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## CORRIGENDUM

This document corrects document SWD(2025) 110 final, part 1/21, of 30.04.2025.  
Missing words in penultimate paragraph on p. 49; and incorrect year in “Sources: CORDA data as of 6 December 2025” under Table 2 on p. 50.  
The text shall read as follows:

### COMMISSION STAFF WORKING DOCUMENT

#### EVALUATION

#### **Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024)**

#### *Accompanying the document*

#### **Communication from the Commission to the European Parliament and the Council**

#### **Horizon Europe: Research and Innovation at the heart of competitiveness**

{COM(2025) 189 final}

## Contents

|  |           |
|--|-----------|
| <b>1. Introduction: purpose and scope of the evaluation .....</b>  | <b>15</b> |
| <b>2. What are the expected outcomes of Horizon Europe? .....</b>  | <b>16</b> |
| <b>2.1 HORIZON EUROPE AND ITS OBJECTIVES.....</b>  | <b>16</b> |
| <b>2.2 POINTS OF COMPARISON .....</b>  | <b>20</b> |
| <b>3. How has the situation evolved during the evaluation period? .....</b>  | <b>20</b> |
| <b>4. Evaluation findings .....</b>  | <b>25</b> |
| <b>4.1 TO WHAT EXTENT HAS HORIZON EUROPE BEEN SUCCESSFUL SO FAR AND WHY? .....</b>   | <b>25</b> |
| 4.1.1. Effectiveness: <b>Towards scientific impacts</b> – To what extent has Horizon Europe advanced scientific excellence (Key Impact Pathways 1-3)? .....  | 26        |
| <i>Creating high-quality new knowledge (Key Impact Pathway 1) .....</i>  | <i>26</i> |
| <i>Strengthening human capital in R&amp;I (Key Impact Pathway 2) .....</i>   | <i>27</i> |
| <i>Fostering diffusion of knowledge and open science (Key Impact Pathway 3).....</i>   | <i>27</i> |
| <i>European Research Council (ERC).....</i>  | <i>28</i> |
| <i>Marie Skłodowska-Curie actions (MSCA).....</i>  | <i>28</i> |
| <i>Research infrastructures.....</i>   | <i>29</i> |
| <i>Pillar II contributions to Excellent Science .....</i>  | <i>30</i> |
| <i>Joint Research Centre's direct research actions .....</i>   | <i>30</i> |
| 4.1.2. Effectiveness: <b>Towards 'societal impacts'</b> – To what extent has Horizon Europe increased the R&I contribution to address global challenges (Key Impact Pathways 4-6)? .....                   | 32        |
| <i>Addressing EU policy priorities and global challenges through R&amp;I (Key Impact Pathway 4) .....</i>  | <i>32</i> |
| <i>Delivering benefits and impact via R&amp;I missions (Key Impact Pathway 5).....</i>   | <i>33</i> |
| <i>Strengthening the uptake of R&amp;I in society (Key Impact Pathway 6).....</i>  | <i>37</i> |
| <i>Horizon Europe clusters.....</i>  | <i>38</i> |
| <i>Impacts of institutionalised European partnerships .....</i>  | <i>41</i> |
| <i>Social sciences and humanities (SSH) .....</i>  | <i>44</i> |
| <i>Promotion of gender equality .....</i>  | <i>45</i> |
| <i>International cooperation, including association of third countries .....</i>   | <i>48</i> |
| 4.1.3. Effectiveness: <b>Towards economic impacts</b> – To what extent has Horizon Europe fostered innovation-based growth, created jobs and leveraged investments in R&I (Key Impact Pathways 7-9)? ..... | 52        |
| <i>Generating innovation-based growth (Key Impact Pathway 7) .....</i>   | <i>52</i> |
| <i>Creating more and better jobs (Key Impact Pathway 8) .....</i>  | <i>53</i> |
| <i>Leveraging investments in R&amp;I (Key Impact Pathway 9).....</i>   | <i>53</i> |
| <i>Programme-wide macroeconomic effects on GDP.....</i>  | <i>54</i> |
| <i>Pillar II economic effects.....</i>   | <i>55</i> |
| <i>European Innovation Council (EIC).....</i>  | <i>55</i> |
| <i>European innovation ecosystems (EIE).....</i>   | <i>56</i> |
| <i>European Institute of Innovation and Technology (EIT) .....</i>   | <i>57</i> |
| 4.1.4. Towards the objective to <b>widen participation and strengthen the European Research Area</b> .....   | 58        |
| 4.1.5. Exploitation and dissemination of results .....   | 61        |
| <b>4.2 EFFICIENCY .....</b>  | <b>63</b> |
| 4.2.1 Costs of Horizon Europe by stakeholder group .....   | 63        |
| 4.2.2 Performance against administrative targets & value-for-money of Horizon Europe.....  | 67        |
| <i>Administrative efficiency of the EU public sector.....</i>  | <i>67</i> |
| <i>Value for money of Horizon Europe .....</i>   | <i>67</i> |
| 4.2.3 Performance of Horizon Europe's simplification measures .....  | 68        |
| <i>Rationalisation of the European Partnership landscape .....</i>   | <i>68</i> |
| <i>Lump sum funding .....</i>  | <i>69</i> |
| <i>Blind evaluation of proposals .....</i>   | <i>71</i> |

|   |           |
|---|-----------|
| <i>Ethics appraisal</i> .....   | 72        |
| 4.2.4 Potential areas for further simplification .....  | 73        |
| 4.2.5 Monitoring and reporting.....   | 74        |
| <b>4.3 COHERENCE .....</b>  | <b>76</b> |
| 4.3.1. Internal coherence.....  | 76        |
| <i>Technology readiness levels (TRLs)</i> .....   | 79        |
| <i>New programme governance</i> .....   | 81        |
| 4.3.2. External coherence and synergies.....  | 81        |
| <i>Synergies between Horizon Europe and other EU programmes</i> .....                           | 81        |
| <i>Seal of Excellence as an instrument of synergy</i> .....                                     | 82        |
| <i>EU Missions and European Partnerships as instruments of synergy</i> .....                    | 84        |
| <b>4.4 EU ADDED VALUE .....</b>   | <b>86</b> |
| 4.4.1. Economic added value: Horizon Europe leveraged additional resources for R&I .....        | 86        |
| <i>European Partnerships</i> .....  | 87        |
| <i>EU Missions</i> .....  | 88        |
| 4.4.2. Horizon Europe-supported activities would not have been possible without EU funding..... | 88        |
| <i>Collaboration networks across borders</i> .....  | 88        |
| <i>Scale and scope of R&amp;I support</i> .....   | 89        |
| 4.4.3 Structuring effect of Horizon Europe and the European partnerships .....                  | 90        |
| <b>4.5 RELEVANCE .....</b>  | <b>91</b> |
| 4.5.1. Responding to the needs of beneficiaries .....   | 91        |
| 4.5.2. Strengthening Europe's competitiveness .....   | 93        |
| 4.5.3. Response to emergencies and changing priorities.....                                     | 95        |
| <b>5. What are the conclusions and lessons learned? .....</b>                                   | <b>97</b> |
| 5.1 CONCLUSIONS.....  | 97        |
| 5.2 LESSONS LEARNED .....   | 102       |

## Annexes:

Annex 1 – Procedural information

Annex 2 – Methodology and analytical models used

Annex 3 – Evaluation matrix and, where relevant, details on answers to the evaluation questions (by criterion)

Annex 4 – Overview of benefits and costs

Annex 5 – Stakeholder consultation: Synopsis report

Annex 6 – Description of synergies, by programme

Annex 7 – Partnership leverage analysis

Annex 8 – Additional state-of-play data, incl. on European Partnerships and EU Missions

Annex 9 – Activities implemented to engage citizens and end-users in projects

Annex 10 – Horizon Europe response to emergencies

*Partnership evaluation reports:*

Annex 11 – Chips JU

Annex 12 – Circular Bio-based Europe JU

Annex 13 – Clean Aviation JU

Annex 14 – Clean Hydrogen JU

Annex 15 – Europe's Rail JU

Annex 16 – EuroHPC JU

Annex 17 – Global Health EDCTP3 JU

Annex 18 – Innovative Health Initiative JU

|  |  |
|--|--|
| Annex 19 – SESAR 3 JU                        |  |
| Annex 20 – Smart Networks and Services JU    |  |
| Annex 21 – EIT KIC Climate                   |  |
| Annex 22 – EIT KIC Digital                   |  |
| Annex 23 – EIT KIC Food                      |  |
| Annex 24 – EIT KIC Health                    |  |
| Annex 25 – EIT KIC InnoEnergy                |  |
| Annex 26 – EIT KIC Manufacturing             |  |
| Annex 27 – EIT KIC Raw Materials             |  |
| Annex 28 – EIT KIC Urban Mobility            |  |
| Annex 29 – European Partnership on Metrology |  |

### **List of Figures**

|   |    |
|---|----|
| Figure 1: Horizon Europe intervention logic.....  | 1  |
| Figure 2 : Horizon Europe programme structure .....   | 4  |
| Figure 3: Horizon Europe key figures .....  | 6  |
| Figure 4: Distribution of Horizon Europe grant funding by type of beneficiary .....   | 7  |
| Figure 5: Share of new participants, by country category .....  | 8  |
| Figure 6: Distribution of Horizon Europe funding by pillar and programme part.....  | 9  |
| Figure 7: Distribution of Horizon Europe applications by type of organisation.....  | 10 |
| Figure 8: Horizon Europe success rates .....  | 10 |
| Figure 9: Applications per thousand scientists and engineers by MS .....  | 11 |
| Figure 10: Scientific impacts of Horizon Europe – Key Impact Pathways 1-3 .....   | 12 |
| Figure 11 - Societal impacts of Horizon Europe – Key Impact Pathways 4-6.....   | 19 |
| Figure 12: Economic impacts of Horizon Europe – Key Impact Pathways 7-9 .....   | 39 |
| Figure 13: Overview of Horizon Europe types of action and their characteristics .....   | 64 |
| Figure 14: Current TRL of Horizon Europe projects (left), as well as the levels at the project beginning and expected/achieved at the end, taking into consideration the size of EU contributions (right) ..... | 68 |
| Figure 15: Evolution of the framework programme for R&I.....  | 79 |
| Figure 16: R&D expenditure in billion EUR, 2000-2021 .....  | 82 |
| Figure 17: The EU's R&D intensity gap with other major economies .....  | 82 |

### **List of Tables**

|  |    |
|--|----|
| Table 1: Gender balance in Horizon Europe .....  | 33 |
| Table 2: Collaborations, participations, and funding by type of country (international cooperation).....   | 37 |
| Table 3: Overview of the application of Article 22(5) in the main Horizon Europe work programmes (WP) 2021-2022 and 2023-2024 and instruments..... | 37 |
| Table 4: Results of macro-economic modelling for Horizon Europe funding (Nemesis, RHOMOLO, FIDELIO) .....  | 42 |
| Table 5: Progress on EIT key monitoring indicators.....  | 45 |
| Table 6: Collaborations, participations and funding by type of country (widening) .....  | 46 |
| Table 7: Seals of Excellence awarded .....   | 71 |

## Abbreviations

|       |  |
|-------|--|
| AYA   | Adolescent and young adult (cancer patients)             |
| CDI   | Citation distribution index                              |
| CEF   | Connecting Europe Facility                               |
| CPS   | Call Passport System                                     |
| CSA   | Coordination and support action                          |
| DEP   | Digital Europe programme                                 |
| DG    | Directorate-General                                      |
| ECA   | European Court of Auditors                               |
| EESC  | European Economic and Social Committee                   |
| EFSI  | European Fund for Strategic Investments                  |
| EIC   | European Innovation Council                              |
| EIT   | European Institute of Innovation and Technology          |
| EMPIR | European Metrology Programme for Innovation and Research |
| ERA   | European Research Area                                   |
| ERC   | European Research Council                                |
| ESIF  | European Structural and Investment Funds                 |
| ERDF  | European Regional Development Fund                       |
| EU    | European Union   |
| FP    | Framework programme                                      |
| FTE   | Full-time equivalent                                     |
| GDP   | Gross domestic product                                   |
| IA    | Innovation actions                                       |
| IF    | Individual fellowships                                   |
| IKAA  | In-kind contributions to additional activities           |
| IKOP  | In-kind contribution to operational activities           |
| INFRA | Research infrastructures                                 |
| IOI   | EU innovation output indicator                           |
| IPR   | Intellectual property rights                             |
| JRC   | Joint Research Centre                                    |
| JU    | Joint undertaking  |

|      |  |
|------|--|
| KIC  | Knowledge and Innovation Communities   |
| MAA  | Multi-actor approach   |
| MSCA | Marie Skłodowska-Curie actions   |
| NEIA | New European Innovation Agenda   |
| PRC  | Private for-profit entities (excluding higher or secondary education bodies) |
| RIA  | Research and innovation actions  |
| RIV  | Regional Innovation Valleys  |
| R&I  | Research and innovation  |
| RI   | Research infrastructure  |
| SDG  | Sustainable Development Goals  |
| SME  | Small and medium-sized enterprises   |
| SoE  | Seal of excellence   |
| SWD  | Staff working document   |
| SEWP | Spreading excellence and widening participation                              |
| SSH  | Social sciences and humanities   |
| TFEU | Treaty on the Functioning of the European Union                              |
| TRL  | Technology readiness levels  |
| VC   | Venture capital  |
| UN   | United Nations   |

## Glossary

| <i>Term</i>                       | <i>Meaning or definition</i>   |
|-----------------------------------|--|
| Administrative data               | Data collected by government entities and agencies in the course of their regular activities for administrative purposes, such as to keep track of project payments.   |
| Applicant                         | Legal entity submitting an application for a call for proposals.   |
| Application                       | The involvement of a legal entity in a proposal. A single applicant can make several applications in different proposals. A single proposal can include several organisations and, therefore, several applications.  |
| Art. 185 initiatives              | Article 185 of the TFEU allows the integration of national efforts into a programme undertaken jointly by several Member States, with the participation of the EU, including participation in the structures created for carrying out the joint programme. In Horizon Europe, this includes the European Metrology Programme for Innovation and Research.  |
| Associated countries              | Association is the closest form of international cooperation. Entities from associated countries can participate under similar conditions as those from EU countries. A country becomes associated to Horizon Europe through an international agreement. 19 countries are associated to Horizon Europe <sup>1</sup> (those not previously associated under Horizon 2020 are marked in bold): Albania, Armenia, Bosnia and Herzegovina, <b>Canada</b> , Faroe Islands, Georgia, Iceland, Israel, <b>Kosovo</b> <sup>*</sup> , Moldova, Montenegro, <b>New Zealand</b> <sup>2</sup> , North Macedonia, Norway, Serbia, Tunisia, Türkiye, Ukraine, United Kingdom <sup>3</sup> .  |
| Background and foreground IPR     | Background IPR applications that are inputs of research rather than outputs, i.e. for which no causal link can be established with the support received by the programme (e.g. IPR applications reported by participants but filed before the start of a project. Foreground IPR are those filed after the start of the project that are genuine outputs of project research.  |
| Causality                         | The sufficient link from one factor or event (the cause) to another factor or event (the effect).  |
| Citation distribution index (CDI) | The citation distribution index is the sum of the weighted share of each decile of a distribution of publications, ranked by citation count (i.e. the first decile includes the 10% least-cited publications, the 10th decile includes the 10% most cited publications). This indicator is also normalised by year and by subfield of science. The CDI is normalised to 0 (i.e., the world average). A score above 0 indicates an above average level of performance, while a score below 0 indicates the opposite.  |
| Cluster                           | To maximise impact, flexibility and synergies, the Horizon Europe Regulation organises R&I activities in six clusters, interconnected through pan-European research infrastructures, which individually and together incentivise interdisciplinary, cross-sectoral, cross-policy, cross-border and international cooperation (Annex 1 to the Regulation). Clusters make up Horizon Europe's second Pillar, 'Global Challenges and European Industrial Competitiveness'. They serve to structure expected impacts which have been defined based on existing strategic documents that are developed together with external stakeholders. Input from these is translated in research topics in a process of co-design (with external stakeholders and the public) and co-creation |

<sup>1</sup> [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation\\_horizon-auratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-auratom_en.pdf)

<sup>\*</sup> This designation does not affect positions on status, and is in line with UNSCR 1244/1999 and the ICJ Opinion on the Kosovo declaration of independence.

<sup>2</sup> Associated to Pillar II 'Global Challenges and European Industrial Competitiveness' as from the work programmes, including for the institutionalised European partnerships.

<sup>3</sup> Associated to the entire programme, with the only exception of the EIC Fund, for award procedures implementing the EU budget from 2024 onwards.

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|  | (among Commission services). The six clusters are: health; culture, creativity and inclusive society; civil security for society; digital, industry and space; climate, energy and mobility; food, bioeconomy, natural resources, agriculture and environment.  |
| Co-funded partnerships   | <p>In Horizon Europe, co-funded partnerships involve EU countries, with research funders and other public authorities at the core of the consortium. This evaluation covers nine such partnerships:</p> <ol style="list-style-type: none"> <li>1. Water4all: Water security for the planet</li> <li>2. Clean Energy Transition</li> <li>3. Driving urban transitions to a sustainable future (DUT)</li> <li>4. A climate neutral, sustainable and productive Blue Economy</li> <li>5. European Partnership on Transforming Health and Care Systems</li> <li>6. ERA for Health</li> <li>7. European Biodiversity Partnership (Biodiversa+)</li> <li>8. European Partnership on the Assessment of Risks from Chemicals (PARC)</li> <li>9. Innovative SMEs.</li> </ol> <p>State-of-play (implementation) statistics also include data on other, more recent co-funded partnerships, namely: accelerating farming systems transition – agroecology living labs and research infrastructures; animal health and welfare; personalised medicine; and sustainable food systems for people, planet and climate.</p> |
| Co-funding rate  | Ratio (expressed as a percentage) between the partners' contribution to a project (see "co-investment") and the total eligible costs of that project. It is the opposite of the funding rate. It differs from the leverage factor, as the denominator is the total project costs, not the EU contribution to the project.   |
| Cohesion policy funds  | Financing provided under Cohesion Policy funds from, e.g. the European Regional Development Fund (ERDF), European Social Fund Plus (ESF+) and the Cohesion Fund in the 2021-2027 period (previously referred to as the European Structural and Investment Funds, ESIF, in the 2014-2020 period). In the current financial framework, the European Agricultural Fund for Rural Development (EAFRD) is not part of the Common Provision Regulation (2021/1060) but part of Common Agricultural Policy regulation (2021/2115). The scope of Common Provision Regulation has thus changed.  |
| Co-investment (or "direct call leverage")                        | At the level of R&I projects, the difference between the project's total eligible costs and the EU contribution to the project. This is equal to Key Impact Pathway #9, short-term indicator ("Co-investment").   |
| Contractual public-private partnership (cPPP) under Horizon 2020 | These are structured public-private partnerships that have direct input into the preparation of work programmes in areas of major industrial significance. They develop roadmaps for R&I activities. There are currently eight partnerships: Factories of the future; Energy-efficient buildings; Green vehicles; Future internet; Sustainable process industry; Robotics; Photonics; and High-performance computing.   |
| Control group  | A group that is suitable for comparison with the group of units that were subject to a given policy. For more information, see Annex 2.   |
| Coordination and support action (CSA)                            | An action consisting primarily of accompanying measures such as standardisation, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogues and mutual learning exercises and studies, including design studies for new infrastructures. This may also include complementary networking and coordination activities between programmes in different countries.  |
| Co-programmed partnerships                                       | <p>In Horizon Europe, co-programmed partnerships are concluded between the Commission and mostly private (and sometimes public) partners. The evaluation covers 11 such partnerships:</p> <ol style="list-style-type: none"> <li>1. Artificial Intelligence, Data and Robotics</li> </ol>   |



|   |  |
|---|--|
|   | <ol style="list-style-type: none"> <li>2. Made in Europe</li> <li>3. Photonics Europe</li> <li>4. Processes4planet</li> <li>5. Batteries: towards a competitive European industrial battery value chain</li> <li>6. Clean steel – Low-carbon steelmaking</li> <li>7. Towards zero-emission road transport (2ZERO)</li> <li>8. People-centric Sustainable Built Environment (Built4People)</li> <li>9. Zero-emission waterborne transport</li> <li>10. Connected and Automated Mobility (CCAM)</li> <li>11. European Open Science Cloud (EOSC) Association</li> </ol>   |
| CORDA (and eCORDA)                              | CORDA stands for Common Research Datawarehouse. It is the internal repository of R&I data gathered from EU R&I framework programmes. eCORDA stands for External COMmon Research Datawarehouse. It contains data on projects and proposals.   |
| Correlation                                     | Association between two variables. The establishment of a reasonable correlation between variables does not imply the establishment of a causal effect.  |
| Counterfactual impact evaluation (CIE)          | Refers to statistical procedures to assess the effect of a policy measure and gauge the degree to which it attained its intended consequences. For more information, see Annex 2.  |
| Differences in differences (DiD)                | A counterfactual impact evaluation (CIE) method. For more information, see Annex 2.  |
| Direct leverage                                 | Difference between a project's total costs and the EU contribution.  |
| Dissemination action                            | The public disclosure of the results by any appropriate means (other than resulting from protecting or exploiting the results), including by scientific publications in any medium.  |
| European Partnerships                           | <p>European Partnerships bring the European Commission and private and/or public partners together to address some of Europe's most pressing challenges through concerted R&amp;I initiatives. They are a key implementation tool of Horizon Europe. There are three types:</p> <ul style="list-style-type: none"> <li>• institutionalised partnerships in the field of R&amp;I between the EU, EU Member States and/or industry (including joint undertakings, Art. 185 partnerships and the EIT Knowledge and Innovation Communities – described and listed as separate items in this glossary);</li> <li>• co-programmed partnerships between the Commission and mostly private (and sometimes public) partners;</li> <li>• co-funded partnerships involving EU countries, with research funders and other public authorities at the core of the consortium.</li> </ul> |
| European Research Council (ERC)                 | The European Research Council is a European funding organisation for excellent frontier research which offers various grant schemes such as: starting grants, consolidator grants, advanced grants, synergy grants and proof of concept. The ERC is led by an independent governing body, the Scientific Council.  |
| European Structural and Investment Funds (ESIF) | <p>ESIF covers the 2014-2020 programming period. It includes the following funds:</p> <ul style="list-style-type: none"> <li>- European Regional Development Fund (ERDF)</li> <li>- European Social Fund (ESF)</li> <li>- Cohesion Fund (CF)</li> <li>- European Agricultural Fund for Rural Development (EAFRD)</li> <li>- European Maritime and Fisheries Fund (EMFF).</li> </ul> <p>The relevant legislation for these funds was the Common Provision Regulation (1303/2013).</p>   |

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| Evaluation criteria                                   | According to better regulation guidelines and toolbox, the five evaluation criteria assess the extent to which an intervention is: 1) <i>effective</i> in fulfilling expectations and meeting its objectives; 2) <i>efficient</i> in terms of cost-effectiveness and proportionality of actual costs to benefits; 3) <i>relevant</i> to current and emerging needs; 4) <i>coherent</i> internally and externally with other EU interventions or international agreements; and 5) has <i>EU added value</i> - i.e. produces results beyond what would have been achieved by Member States acting alone.   |
| Exploitation action                                   | Using results in further research activities other than those covered by the action concerned, or in developing, creating and marketing a product or process, or in creating and providing a service, or in standardisation activities.  |
| Financial instruments                                 | Equity or quasi-equity investments, loans, guarantees and other risk-sharing instruments. Horizon 2020's financial instruments operated in conjunction with those of COSME. Strong synergies were to be ensured with the European Fund for Strategic Investments (EFSI) to create the maximum possible impact. This was the main form of funding for activities close to market under Horizon 2020.  |
| Fast track to innovation (FTI) actions                | A type of action under Horizon 2020 that funded any kind of project on close-to-market innovation activities.  |
| Focus areas in Horizon 2020                           | Horizon 2020 set out four focus areas to stimulate the development of knowledge and technologies deemed crucial to tackling societal challenges. These were: <ul style="list-style-type: none"> <li>• boosting the effectiveness of the Security Union (predominantly funding projects on vulnerabilities and threats related to European cybersecurity, migration and (financial) technologies);</li> <li>• connecting economic and environmental gains - the circular economy (predominantly funding projects on technological innovations in industrial processes and the reuse of resources to reduce waste and CO<sub>2</sub> emissions);</li> <li>• digitising and transforming European industry and services (predominantly funding projects concerned with automation, artificial intelligence and machine learning, as well as Earth observation);</li> <li>• building a low-carbon, climate-resilient future (predominantly funding projects on energy production and consumption, emphasising the economic and environmental aspects of electricity storage, distribution and use).</li> </ul> |
| Funding rate  | Ratio (expressed as a percentage) of the EU contribution to a project and project's total eligible costs.  |
| GDP multiplier  | The GDP multiplier is obtained by dividing the cumulative change in GDP by the magnitude of the policy stimulus and can be understood as the amount of GDP produced for each euro invested in the policy. It represents the economic effect of the policy, and does not account for other direct and indirect costs.   |
| High-quality proposal                                 | A proposal that scores above the threshold established for the action. Depending on the action, admissible and eligible proposals are evaluated and ranked against the award criteria (excellence, impact, quality and efficiency of the implementation). Award criteria and their thresholds are specified in the general annexes <sup>4</sup> to the Horizon Europe work programme.  |
| In-kind contributions to additional activities (IKAA) | Private members of some joint undertakings (JU) had to provide a minimum amount of in-kind contributions for costs incurred for 'additional activities' outside the JU's work programme and budget, but falling within the scope of the JU's general objectives. In Horizon Europe, the JUs' Single Basic Act (Art. 2) defines them as 'contributions by the private members, constituent entities or the affiliated entities of either, and by  |

<sup>4</sup> Horizon Europe work programme 2023-2025, general annexes, pp. 23-26, [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-13-general-annexes\\_horizon-2023-2024\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-13-general-annexes_horizon-2023-2024_en.pdf)

|  |   |
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|  | international organisations, consisting of the costs incurred by them in implementing additional activities less any contribution to those costs from the Union and from the participating states of that joint undertaking’.   |
| In-kind contribution to operational activities (IKOP)  | All private members must contribute a minimum amount to the costs of the JUs’ R&I projects. In Horizon Europe, the JUs’ Single Basic Act (Art. 2) defines them as ‘contributions by private members, constituent entities or the affiliated entities of either, by international organisations and by contributing partners, consisting of the eligible costs incurred by them in implementing indirect actions less the contribution of that joint undertaking and of the participating states of that joint undertaking to those costs’.  |
| Innovation action  | An action primarily consisting of activities that directly aim to produce plans and arrangements or designs for new, altered or improved products, processes or services, possibly including prototyping, testing, demonstrating, piloting, large-scale product validation and market replication.  |
| Interservice groups  | Commission mechanism to ensure internal consistency of policy interventions.  |
| Intervention logic   | A (narrative) description and usually a diagram summarising how the intervention was expected to work. It describes the expected logic of the intervention or chain of events that should lead to the intended change   |
| Joint undertakings (JUs)   | <p>Public-private institutionalised partnerships of the Union with industry and stakeholders for the joint funding and implementation of strategic R&amp;I agendas under Article 187 of TFEU (via a dedicated funding body).</p> <p>Under Horizon 2020, these were: the Innovative Medicines Initiative 2 (IMI2); Electronic Components and Systems for European Leadership (ECSEL); Fuel Cells and Hydrogen (FCH); Clean Sky, Bio-based Industries (BBI); Shift2Rail (S2R); Single European Sky ATM Research (SESAR); and Fusion for Energy (F4E) – most of which also existed under FP7<sup>5</sup>.</p> <p>Under Horizon Europe, the JUs include: the Innovative Health Initiative (IHI); Global Health EDCTP3 Partnership, Europe High-Performance Computing (EuroHPC); the Chips JU (formerly, Key Digital Technologies, KDT); Smart Networks and Services (SNS); Circular Bio-based Europe (CBE); the Clean Aviation JU; the Clean Hydrogen JU; the Europe’s Rail JU; and Single European Sky ATM Research 3 (SESAR 3).</p> |
| Knowledge and Innovation Communities of the European Institute of Innovation and Technology (EIT KICs) | Institutionalised partnerships, as referred to in Regulation (EU) 2021/695, of higher education institutions, research organisations, companies and other stakeholders in the innovation process. They take the form of a strategic network, encouraged and funded by the EIT. The network can have various legal forms and carries out joint innovation planning (mid- to long-term), to develop innovative products and services, start or support new companies and train entrepreneurs, to meet the EIT challenges and contribute to attaining the objectives established under Regulation (EU) 2021/695. The EIT KICs launched prior to Horizon 2020 were EIT Climate-KIC (2010), EIT Digital (2010), EIT InnoEnergy (2010); the EIT KICs launched under Horizon 2020 included EIT Health (2014), EIT Raw Materials (2014), EIT Food (2016), EIT Manufacturing (2018) and EIT Urban Mobility (2018). The EIT Culture and Creativity has been launched in 2022 under Horizon Europe.  |
| Leverage factor  | <p>The ratio (expressed as a number or a value in euro) between the total costs borne by partners other than the EU for R&amp;I activities and the EU contribution to R&amp;I activities. It is calculated for all measures of leverage set out above.</p> <p>For co-investment, the formula is: <math>CA_{Part} / CA_{EU}</math></p> <p>And for total direct leverage (including additional activities): <math>(CA_{Part} + AA_{Part}) / (CA_{EU} + AA_{EU})</math>.</p>   |

<sup>5</sup> ECA annual report on EU Joint Undertakings for the financial year 2020, pp. 11-12, Figure 1.2. [https://www.eca.europa.eu/Lists/ECADocuments/JUS\\_2020/JUS\\_2020\\_EN.pdf](https://www.eca.europa.eu/Lists/ECADocuments/JUS_2020/JUS_2020_EN.pdf)

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|-------------------------|--|
|                         | No financial data is available to this evaluation on additional activities funded by the EU (AA <sub>EU</sub> ) which therefore equals to zero: this means other funding sources with their origin in the EU budget, such as cohesion policy funds, are not accounted for in additional activities.  |
| Lighthouses             | <p>This concept/term is used by three EU Missions, in different ways:</p> <ul style="list-style-type: none"> <li>• Mission Soil: places for demonstration of solutions, training and communication that are exemplary in their performance in terms of soil health improvement.</li> <li>• Mission Ocean &amp; Waters: sites piloting, demonstrating and deploying the Mission activities across EU sea and river basins.</li> <li>• Mission Cities: projects or initiatives with well-defined and measurable goals. They focus on implementation, fast delivery and creating a positive impact-minded culture in a specific area of action.</li> </ul>                            |
| Living labs             | <p>This concept/term is used by two EU Missions, in somewhat different ways.</p> <ul style="list-style-type: none"> <li>• Mission Soil: user-centred, place-based and transdisciplinary R&amp;I ecosystems, which involve land managers, scientists and other relevant partners in systemic research and co-design, testing, monitoring and evaluation of solutions, in real-life settings, to improve their effectiveness for soil health and accelerate adoption.</li> <li>• Mission Cities: open innovation ecosystems that are deployed in real-life environments. They serve to co-design, test, prototype and/or scale-up specific technical or social solutions.</li> </ul> |
| National contact points | Network funded by the framework programme tasked with providing guidance, practical information and assistance on all aspects of participation in Horizon Europe.  |
| Newcomer                | Horizon Europe participant who was not involved in a Horizon 2020 project (not a Horizon 2020 participant). For Horizon 2020, a participant that was not involved in any FP7 project.  |
| Openness                | Horizon Europe is 'as open as possible as closed as necessary'. It is open to almost <sup>6</sup> all countries, 'by default'. It follows a non-discriminatory approach: researchers and innovators of any nationality can apply for grants (e.g. MSCA, ERC). According to Article 14 of the regulation establishing Horizon Europe, this principle does not apply to scientific publications which are all open.  |
| Oversubscription rate   | Share of eligible proposals evaluated as being above the quality threshold that were not retained due to budgetary constraints, out of all eligible proposals evaluated by experts with a score above the quality threshold.   |
| Participant             | Any legal entity carrying out an action or part of an action under Horizon Europe.   |
| Participation           | The involvement of a legal entity in a project. A single participant can be involved in multiple projects.   |
| Policy mix              | The set of activities, instruments and types of action used to implement Horizon Europe.   |
| Prizes                  | Financial contribution (lump-sum) given as the prize in a contest. Prizes are a 'test-validate-scale' open innovation approach that brings together players who are new to an industry and small players that may pursue more radically new concepts than large, institutionalised contestants. Inducement prizes offer an incentive by mobilising new talent and engaging new solver communities around a specific challenge. They are only awarded based on the achievement of a set target, which solves a specific challenge.  |
| Reciprocal access       | Reciprocal access is a new requirement laid down in Article 16.4 of the Horizon Europe Regulation: entities from the EU should be permitted access to and, to the  |

<sup>6</sup> Russia and Belarus under sanctions; China cannot participate to innovation actions (IA) calls.

|                                       |  |
|---------------------------------------|--|
|                                       | extent possible, be allowed to participate in the equivalent programmes of associated countries. This clause refers only to the provision of <i>access</i> and not dedicated funding.  |
| Regression discontinuity design (RDD) | A counterfactual impact evaluation (CIE) method. For more information, see Annex 2.  |
| Final rate of reimbursement           | Proportion of EU funding, i.e. the eligible cost of the action compared to the final grant amount <sup>7</sup> .   |
| Research and innovation action (RIA)  | An action primarily consisting of activities aiming to establish new knowledge or to explore the feasibility of a new or improved technology, product, process, service or solution. This may include basic and applied research, technology development and integration, testing, demonstration and validation on a small-scale prototype in a laboratory or simulated environment.   |
| Research output                       | The results generated by a given action to which access can be given in the form of scientific publications, data or other engineered results and processes such as software, algorithms, protocols and electronic notebooks.  |
| Safeguards                            | Several articles in the Horizon Europe Regulation safeguard EU interests: <ul style="list-style-type: none"> <li>• Art. 19 on ethics and integrity screening, Article 20 on security screening,</li> <li>• Art. 22.5 on protecting the EU's strategic assets, interests, autonomy or security,</li> <li>• Art. 22.6 on additional eligibility criteria based on specific policy requirements,</li> </ul> Art. 39.6 and 40.4 with provisions on exploitation, dissemination and right to object to transfer of ownership and licences to non-associated third-country entities in line with EU interest.  |
| Seal of excellence                    | A quality label which shows that a proposal submitted to a call for proposals exceeded all of the evaluation thresholds set out in the work programme, but could not be funded due to lack of budget available for that call for proposals in the work programme and might receive support from other EU or national sources of funding.   |
| Social sciences and humanities (SSH)  | The Horizon Europe programme guide lists the following SSH disciplines:<br><i>Social sciences, education, business and law</i><br>Social and behavioural sciences: economics, economic history, political science, sociology, demography, anthropology (except physical anthropology), ethnology, futurology, psychology, geography (except physical geography), peace and conflict studies, human rights.<br>Education science: curriculum development in non-vocational and vocational subjects, educational policy and assessment, educational research.<br>Journalism and information: journalism, library and museum sciences, documentation techniques, archival sciences.<br>Business and administration: retailing, marketing, sales, public relations, real estate, finance, banking, insurance, investment analysis, accounting, auditing, management, public and institutional administration.<br>Law: law, jurisprudence, history of law.<br><i>Humanities and the arts</i><br>Humanities: religion and theology, foreign languages and cultures, living or dead languages and their literature, area studies, native languages, current or vernacular language and its literature, interpretation and translation, linguistics, comparative literature, history, archaeology, philosophy, ethics.<br>Arts: fine arts, performing arts, graphic and audio-visual arts, design, crafts. |
| Strategic R&I plan                    | This is an implementing act setting out a strategy to achieve the work programme. The strategy draws on a broad, mandatory multi-stakeholder consultation process and  |

<sup>7</sup> Annotated grant agreement, EU funding programmes 2021-2027, version 2024, p. 226.  
[https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/aga_en.pdf)

|                                   |   |
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|                                   | covers a maximum period of 4 years. It specifies the priorities, suitable types of action and forms of implementation to be used.   |
| Success rate                      | The percentage of proposals that are selected for funding out of the total number of eligible proposals expressed as a percentage (Retained proposals/Eligible proposals*100).  |
| Synergy                           | Synergy occurs when the impact of the results or programmes as a whole is greater than that of the sum of their individual impacts. There are different types of synergies. <u>Upstream</u> synergies are when another programme paves the way to apply to Horizon Europe. <u>Downstream</u> synergies are when other programmes take up the outputs of Horizon Europe and bring them to the market. <u>Cumulative funding</u> occurs when an operation/project that receives support from more than one fund, programme or instrument (including both shared and directly managed funds) for the same item of cost/expenditure. <u>Combined funding</u> is when an ERDF programme or another EU fund supports R&D projects that complement Horizon Europe projects. <u>Transfers</u> are resources allocated to Member States under shared management being - at the request of the Member State concerned - transferred to Horizon Europe. The <u>Seal of excellence</u> is explained under a separate entry above. |
| Technology readiness levels (TRL) | Technology readiness levels indicate the maturity level of particular technologies through a common understanding of technology status and address the entire innovation chain.<br>TRL 1 – basic principles observed; TRL 2 – technology concept formulated; TRL 3 – experimental proof of concept; TRL 4 – technology validated in the lab; TRL 5 – technology validated in a suitable environment; TRL 6 – technology demonstrated in a suitable environment; TRL 7 – system prototype demonstration in an operational environment; TRL 8 – system complete and qualified; TRL 9 – actual system proven in an operational environment.  |
| Time-to-Grant (TTG)               | The time from the date of closure for a call for proposals (call deadline) and the date of signature of a grant by the European Commission. For two-stage calls, the second stage call deadline is used. The target for the Commission is 245 days (8 months). It is the sum of other two indicators, Time-to-Inform and Time-to-Sign (see below)   |
| Time-to-Inform (TTI)              | The time from the date of closure for a call for proposals (call deadline) and the date of communication of evaluation results (invitation letter). The target for the Commission is 153 days (5 months).   |
| Time-to-Sign (TTS)                | The time from the date of communication of evaluation results (invitation letter) and the date of signature of a grant by the European Commission. The target for the Commission is 92 days (3 months).   |
| Total direct leverage             | For European partnerships only: co-investment plus additional activities linked to the goal of the partnership, where applicable. It therefore represents the difference between the total costs of the R&I activities of the partnership (operational project costs, and additional activities) and the contribution of the EU to such activities. Contributions to the administrative costs of the partnership are not included. For non-partnerships, or partnerships without additional activities, this indicator is identical to co-investment.   |
| Widening countries                | Countries identified as ‘low-performing’ in R&I, and thus eligible to apply for actions dedicated to spreading excellence and widening participation. In Horizon Europe: <ul style="list-style-type: none"> <li>• from the Member States, those countries are Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia and Slovenia;</li> <li>• for associated countries, the list of eligible countries is based on an indicator and published in the work programme<sup>8</sup>: Albania, Armenia, Bosnia Herzegovina, Faroe</li> </ul>  |

<sup>8</sup> Article 2, point 17, Regulation 2021/695 of the European Parliament and of the Council of 28 April 2021 establishing Horizon Europe – the FP for Research and Innovation, <http://data.europa.eu/eli/reg/2021/695/oj>

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|  | <p>Islands, Georgia, Kosovo, Moldova, Montenegro, North Macedonia, Serbia, Tunisia, Türkiye, Ukraine, and once associated Morocco.</p> <p>Outermost regions of the EU (defined in Art. 349 TFEU) are also eligible for participation in widening actions. These are Guadeloupe, French Guiana, Martinique, Réunion, Saint-Barthélemy, Saint-Martin (France), the Azores, Madeira (Portugal, itself a widening Member State) and the Canary Islands (Spain).</p> |
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## 1. Introduction: purpose and scope of the evaluation

Horizon Europe is the EU's ninth research and innovation (R&I) funding programme. Set up by Regulation (EU) 2021/695<sup>9</sup>, it covers the period 2021-2027 and has a budget of EUR 93.5 billion<sup>10</sup>. The objective of the interim evaluation of Horizon Europe is to analyse the programme's design, implementation and first results. It is published 4 years after the start of the implementation. It covers all instruments, in every scientific field supported. This evaluation will support the implementation of current EU R&I measures and the design of future measures. It fulfils the Commission's legal obligation to explain how it has spent public funds.

The evaluation addresses the **better regulation criteria** of relevance, coherence, efficiency and effectiveness, and the EU value added of the Horizon Europe programme. It investigates the rationale for the programme, its implementation and achievements, and the longer-term impacts of EU investment in research and innovation. Effectiveness is assessed for the first time following the **Key Impact Pathways** towards the programme's scientific, societal and economic impacts. The efficiency analysis reviews costs and benefits for applicants to the programme and includes an assessment of potential unnecessary burdens and complexities for applicants and participants.

The evaluation faced some data limitations, described in Annex 2. In addition, it is widely acknowledged that it takes time for R&I activities to produce results, outcomes, and impacts and given the lifecycle of research and innovation projects, their impact is expected to become apparent only towards the end of the programme period – or even later.

The evaluation is based on the 15 148 signed projects as of 6 January 2025, including 983 closed projects (6.5%)<sup>11</sup>. This evaluation also assesses the performance of ongoing projects and steps taken for future implementation.

Evaluations of 19 institutionalised partnerships are set out in annexes to this evaluation. They are:

- Eight Knowledge and Innovation Communities of the European Institute of Innovation and Technology<sup>12</sup> (EIT Health, EIT Manufacturing, EIT Raw Materials, EIT Digital, EIT Urban Mobility, EIT Climate KIC, EIT Food, EIT InnoEnergy).
- Nine joint undertakings under the Single Basic Act<sup>13</sup> (Europe Rail, Single European Sky, the Chips JU (previously Key Digital Technologies JU), Smart Network and Services, Global Health EDCTP3, Clean Hydrogen, Circular Bio-based Europe, Clean Aviation and Innovative Health Initiative). Their evaluation includes a final evaluation of the preceding JUs under Horizon 2020, covering a period of 10 years of support by the EU budget.
- The European High Performance Computing JU (EuroHPC).

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<sup>9</sup> Complemented by Council Decision (EU) 2021/764 of 10 May 2021 establishing the Specific Programme implementing Horizon Europe

<sup>10</sup> The mid-term revision of the multi-annual financial framework (MFF) in February 2024 has resulted in a net reduction of EUR 2.1 billion for the Horizon Europe programme over 2025-2027 (redeployed to cover new initiatives), but also added EUR 100 million from previously decommitted funds.

<sup>11</sup> This number also includes 30 suspended and 134 terminated projects.

<sup>12</sup> According to Article 20 of the EIT Regulation 'The Commission (...) shall carry out an interim and final evaluation of the EIT and the KICs. Those evaluations shall feed into the HE evaluations provided for in Art. 52 of Regulation (EU) 2021/695.'

<sup>13</sup> Art. 171.4: 4. States that 'The Commission shall carry out an interim and final evaluation of each JU feeding into the Horizon Europe evaluations (...).' Art 174.13: 3. States that 'The interim evaluations shall include a final evaluation of the preceding JUs.'



- The European Metrology Programme for Innovation and Research (‘Article 185’ initiative)<sup>14</sup>.

The European Defence Fund, a specific programme of Horizon Europe, is outside the scope of this evaluation. It will be evaluated separately in the second quarter of 2025.

## 2. What are the expected outcomes of Horizon Europe?

### 2.1 Horizon Europe and its objectives

The Horizon 2020 interim evaluation and Horizon Europe impact assessment identified four key R&I challenges that should be tackled through future R&I programmes:

- 1) The creation and diffusion of high-quality new knowledge and innovation in Europe should be improved.
- 2) The impact of R&I should be reinforced to deliver on EU priorities.
- 3) The lack of rapid uptake of innovative solutions in the EU should be addressed.
- 4) The European Research Area (ERA) needs to be strengthened.

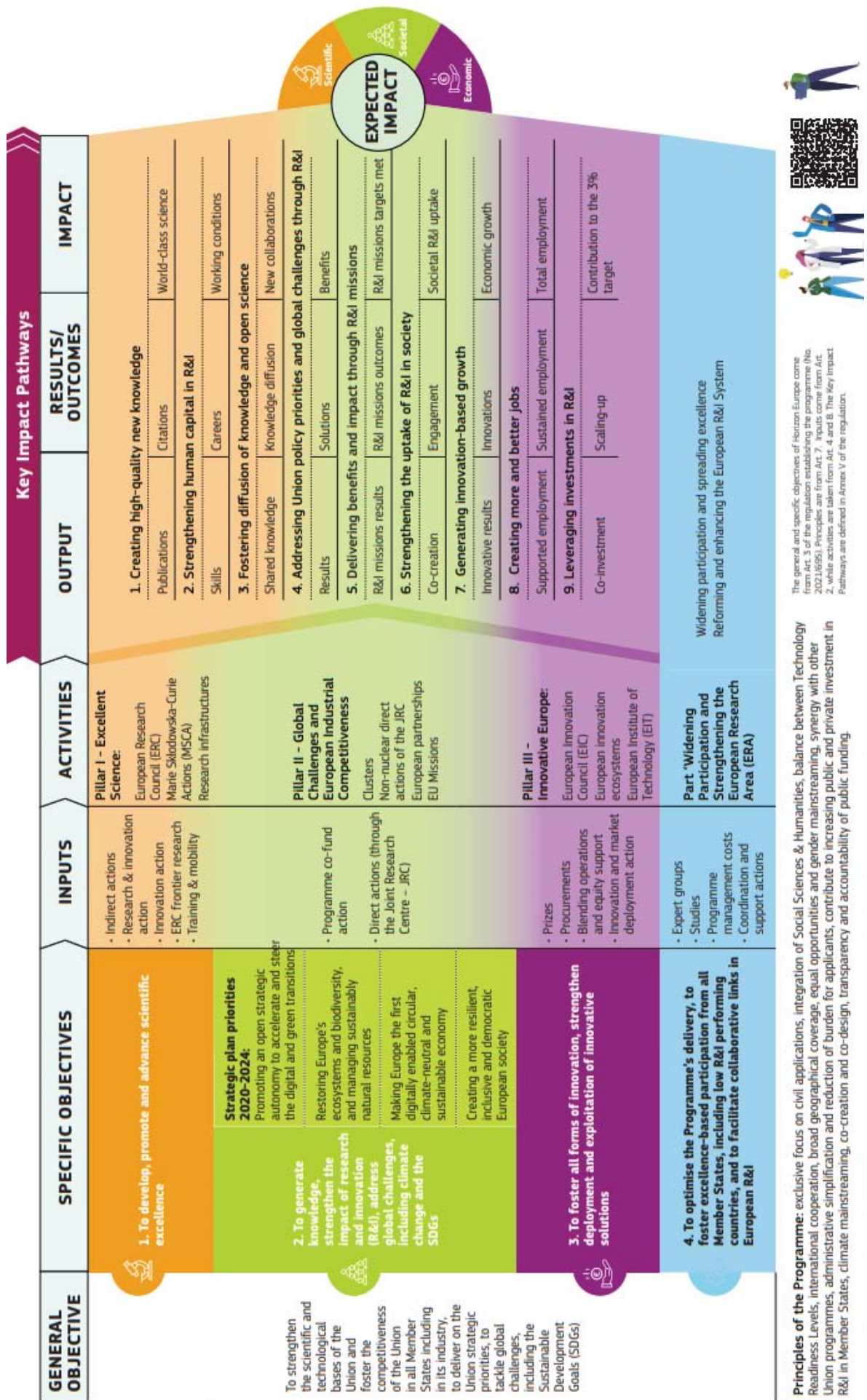
Based on these challenges, Horizon Europe aimed at promoting scientific excellence, generating new knowledge and high-quality technologies, addressing EU priorities and global challenges, providing the appropriate environment, and scaling up finance to turn great ideas into products and services that will create sustainable jobs and economic growth.

The **general objective** of Horizon Europe is to ‘deliver scientific, technological, economic and societal impact from the Union's investments in R&I so as to strengthen the scientific and technological bases of the Union and foster the competitiveness of the Union in all Member States including in its industry, to deliver on the Union strategic priorities and to contribute to the realisation of Union objectives and policies, to tackle global challenges, including the SDGs by following the principles of the 2030 Agenda and the Paris Agreement, and to strengthen the ERA’<sup>15</sup>. The Programme’s **specific objectives** and intervention logic are shown in Figure 1.

<sup>14</sup> The evaluation provision of the European partnership on Metrology decision of 2021 foresees that “The Commission shall conduct an interim evaluation and a final evaluation of the Metrology Partnership in the framework of the Horizon Europe evaluations, in accordance with Article 52 of Regulation (EU) 2021/695.

<sup>15</sup> Article 3, Regulation 2021/695. <http://data.europa.eu/eli/reg/2021/695/oj>

Figure 1: Horizon Europe intervention logic



Horizon Europe brought a considerable change compared to previous framework programmes by introducing **Key Impact Pathways** (KIPs for short, listed on the right-hand side of Figure 1). Every KIP is monitored using a short-term, medium-term and longer-term indicator<sup>16</sup>. Support for basic research remains a cornerstone of the programme, pursued primarily under the first pillar (Excellent Science), but also in the other two pillars. Applied research and incremental innovation are the centre of gravity in the second pillar, addressing both industrial and societal needs (Global challenges and European industrial competitiveness), while innovation is the focus of the third pillar (Innovative Europe). The **mission-oriented** approach provides direction to all activities supported by the programme. The European Partnerships approach was also reinforced under Horizon Europe to become more strategic, coherent, and impact-driven.

The strategic orientations for R&I investments are defined in the multi-annual Horizon Europe strategic plans which act as a compass for defining Horizon Europe's activities. Topics from the Work Programmes come from the Strategic Plan<sup>17</sup>.

Support to **innovation ecosystems** was reinforced under Horizon Europe, and it was given a dedicated programme part under the Innovative Europe pillar. The European innovation ecosystem 'encompasses relations between material resources (such as funds, equipment, and facilities), institutional entities (such as higher education institutions and support services, research and technology organisations, companies, venture capitalists and financial intermediaries) and national, regional and local policy-making and funding entities'<sup>18</sup>.

JRC's direct research actions are funded under the framework programme, continuing its role as in previous periods, to generate scientific evidence for good public policies<sup>19</sup>.

Figure 2: Horizon Europe programme structure



The Horizon Europe Regulation identifies gender equality as a cross-cutting requirement to be followed during implementation<sup>20</sup> and underlines the relevance of social sciences and humanities in the description of cluster priorities. It also states that 'the activities developed under the

<sup>16</sup> Described in more detail in the Commission SWD(2023) 132 final: 'Evidence Framework on monitoring and evaluation of Horizon Europe'. <https://research-and-innovation.ec.europa.eu/system/files/2023-05/swd-2023-132-monitoring-evaluation-he.pdf>.

<sup>17</sup> The Strategic Plan relevant for the evaluation period is available at: [https://commission.europa.eu/system/files/2021-09/ec\\_rtd\\_horizon-europe-strategic-plan-2021-24.pdf](https://commission.europa.eu/system/files/2021-09/ec_rtd_horizon-europe-strategic-plan-2021-24.pdf)

<sup>18</sup> Regulation 2021/695, Article 2.

<sup>19</sup> Ibid, Annex 1.

<sup>20</sup> Ibid, Article 7(6).



Programme should aim to **eliminate gender bias and inequalities, enhancing work-life balance and promoting equality between women and men in R&I**, including the principle of equal pay without discrimination based on sex', that 'the gender dimension should be integrated in R&I content and followed through at all stages of the research cycle' and that 'activities under the Programme should aim to eliminate inequalities and promote equality and diversity in all aspects of R&I with regard to age, disability, race and ethnicity, religion or belief, and sexual orientation'<sup>21</sup>.

The importance of **exploiting** research and innovation results is also underlined in the Regulation: 'More emphasis should be placed on exploiting those results, and the Commission should identify and help maximise opportunities for beneficiaries to exploit results, in particular in the Union'<sup>22</sup>. This aspect is also integrated in the third specific objective. While exploitation is not obligatory, a 'best effort' is expected from beneficiaries<sup>23</sup>.

Horizon Europe has several new features, compared to the preceding programme:

1. strategic plans, multi-annual strategic documents co-designed with stakeholders to guide preparations for bi-annual work programmes;
2. a new instrument: EU missions;
3. streamlined European partnerships;
4. enhanced synergies with other EU and national programmes;
5. a stronger open science policy, to promote collaboration;
6. an updated monitoring system.

The Horizon Europe Work Programme Group discusses indicative timelines for work programme preparation and provides guidance for topic drafting. The group has over 300 members from DGs AGRI, BUDG, CLIMA, CNECT, COMP, DEFIS, DIGIT, EAC, ECFIN, EMPL, ENER, ENV, GROW, HERA, HOME, IAS, JRC, MARE, MOVE, REGIO, RTD, SANTE, SG, TRADE. In addition, representatives from the Executive Agencies (CINEA, EISMEA, ERCEA, HADEA, REA) and the Joint Undertakings (Circular Bio-based Europe, Clean Aviation, Clean Hydrogen, EU Rail, Innovative Health Initiative, Key Digital Technologies) are also part of this group. The Horizon Europe 'main' work programme 2023-2024 and limited extension to 2025 contains 1 060 topics and other actions. The work programme 2023-2024 has 3 297 pages.

The initial budget for Horizon Europe was set at EUR 95.5 billion<sup>24</sup> for 2021-2027. In February 2024, the Council unanimously agreed, and the European Parliament gave consent, to the first ever mid-term revision of the expenditure ceilings in the multi-annual financial framework (MFF). The revision included a redeployment of EUR 2.1 billion from Horizon Europe to cover new initiatives but also added EUR 100 million from previously decommitted funds. Therefore, Horizon Europe Programme budget now stands at EUR 93.5 billion for 2021-2027<sup>25</sup>. The budget of the framework programme draws on a number of sources in addition to the one directly established in its legal base. Added to funds within the MFF<sup>26</sup>, were EUR 5.4 billion from the Next Generation EU (NGEU) instrument in support of the green and digital recovery from the COVID crisis, as well as reused decommitted funds<sup>27</sup>. Funding is allocated through work programmes, which can be either annual or multi-annual, covering different parts of the

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<sup>21</sup> Ibid, recital point 53.

<sup>22</sup> Ibid, recital point 85.

<sup>23</sup> Ibid, Article 39.

<sup>24</sup> Excluding EFTA and third country contributions.

<sup>25</sup> Excluding EFTA and third country contributions.

<sup>26</sup> EUR 84.2 million from MFF (Horizon Europe's legal base) and EUR 3 447 million estimative fines as per Article 5 of the MFF Regulation (fines linked to competition rules and other penalties, sanctions and imposed interest).

<sup>27</sup> In total, the budget includes EUR 678 million estimative reconstitution of decommitments as per Financial Regulation Art 15.3 (Joint declaration).

framework programme. In evaluating project proposals, the following criteria were assessed: (a) excellence; (b) impact; and (c) quality and efficiency<sup>28</sup>.

## 2.2 Points of comparison

This evaluation compares the current Horizon Europe results to those from the same stage of implementation in Horizon 2020. This is the case for the KIP indicators and contribution to Sustainable Development Goals. For funding by country category, success rates, as well as the gender balance indicators – data is compared with the final Horizon 2020 averages.

Where the expected effects were quantitatively estimated or targets were set in the legal base, this evaluation compares the actual Horizon Europe data to these expectations. This is the case for the efficiency metrics (time to contract, time to pay, error rate, etc.) and leverage factors per JU.

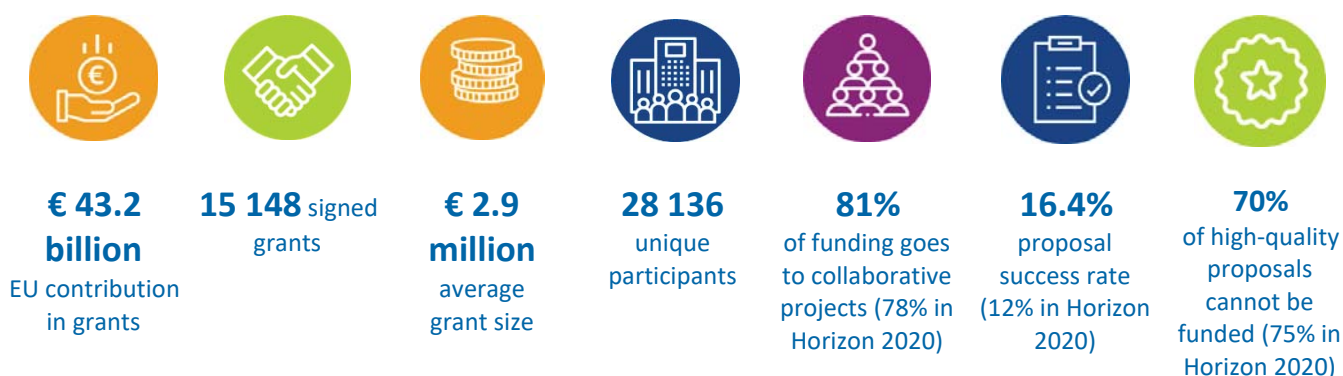
If none of the above is possible, newly available data on Horizon Europe is presented without any baseline or benchmark. This is the case for KIP indicators that did not have an exact equivalent using a comparable methodology in the previous framework programme (e.g. KIP 2 and KIP 6), the share of funding spent on gender equality objectives and biodiversity, as well as some of the new indicators for the EIT KICs.

For all the KIP indicators, data comes from validated periodic project reports in the central database, which is also used for comparison with the baseline from Horizon 2020. In sections on some specific programme parts (i.e. the ERC, MSCA, EIT), the implementing entities also provided data from their internal, continuous monitoring.

## 3. How has the situation evolved during the evaluation period?

Horizon Europe was launched in April 2021 with a total budget of EUR 95.5 billion, which was reduced to EUR 93.5 billion in February 2024. By the end of 2024, 58.4% of the voted budget (including NGEU funds) had been committed and 34.5% of the payments made.

Figure 3: Horizon Europe key figures



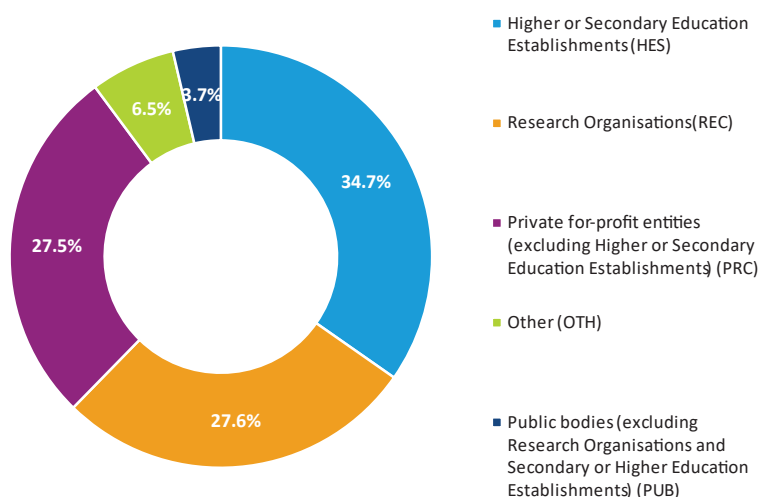
Source: All figures in this chapter come from CORDA<sup>29</sup> and the cut-off date is 6 January 2025.

<sup>28</sup> Ibid, Article 28.

<sup>29</sup> For cascading actions in European partnerships (primarily EIT KICs and co-funded partnerships), the evaluation data source only includes the amounts for the grant initiating the partnership. This should be intended as an *ex-ante* value, as at the reference date the partnership may have not used the Commission grant in full. For more information about this data limitation, see section 4.2.5.

Between 2021 and 2024, **15 148 grants** were signed, with a value of **EUR 43.2 billion** in EU contribution. Slightly more than half of Horizon Europe participants (51.1%) are newcomers, i.e. they did not participate in any Horizon 2020 project. Most newcomers are from the private sector, SMEs in particular.

Figure 4: Distribution of Horizon Europe grant funding by type of beneficiary



Higher education establishments have received the largest contribution (EUR 15.0 billion), followed by research organisations and private for-profit entities, which received similar amounts of contributions (EUR 11.9 billion). Around 16 220 private-for-profit entities (companies) were supported through grants, out of which 2 571 in pillar III (excluding the EIC Fund).

The share of funding per type of organisation is similar to Horizon 2020. Across the entire Horizon Europe programme, 81% of EU funding has been allocated to collaborative projects; in Horizon 2020, this was 78%<sup>30</sup>.

A total of **10 077 SMEs received grants for EUR 7.4 billion**. Each SME joined on average 1.7 projects. **Pillar II involves 70% of all SME unique participants, and a majority of all EU contributions for SMEs, with EUR 4.7 billion allocated to them (68%)**. Within Pillar II, joint undertakings contributed EUR 697 million to SMEs, 15% of the funds managed by JUs. Pillar III plays an increasingly important role: the European Innovation Council alone issued EUR 1.8 billion in grants to SMEs, more than any other programme part.

Additionally, the EIC Fund has approved equity investments towards start-ups and SMEs for further EUR 1.7 billion<sup>31</sup> for the Horizon Europe period alone. This leads to a total amount of Horizon Europe funding allocated to SMEs of EUR 9.1 billion as of 6 January 2025 (20.3% of total FP funding including approved equity investments). However, just around one third of approved EIC Fund investments (EUR 0.57 billion) have actually been paid out to beneficiaries to date<sup>32</sup>.

<sup>30</sup> SWD(2024)29final, p. 16.

<sup>31</sup> The Horizon Europe EIC Fund figures are provided by the European Investment Bank, which manages the Fund on behalf of the Commission. The reference date is 1 December 2024. Unless where expressly specified, statistics in this section do not include the EIC Fund.

<sup>32</sup> For more statistics and analysis on SMEs (at an earlier reference date), see European Commission, SME participation in Horizon Europe, EU Publications Office, 2024.

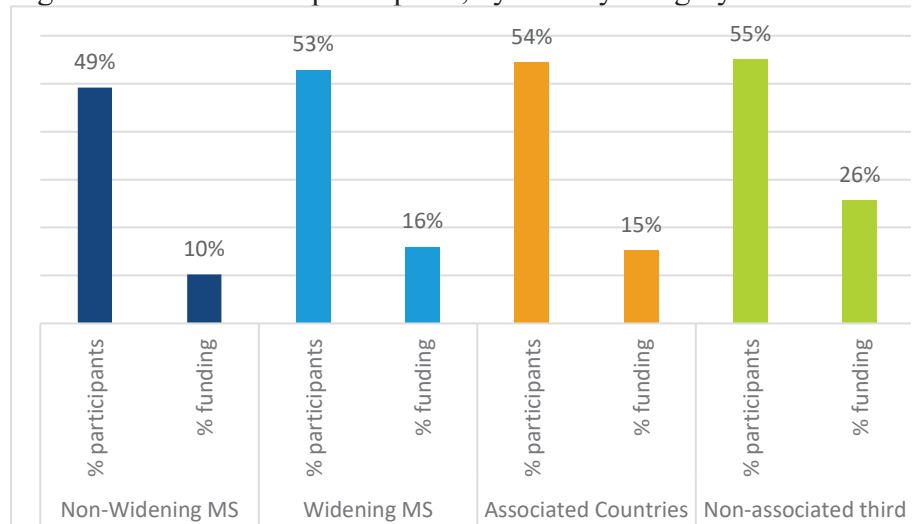
The Horizon Europe 15 ‘widening’ Member States<sup>33</sup> have received 14% of all the funding to date<sup>34</sup> - the same 15 MS had received 9% of the total funding in Horizon 2020<sup>35</sup>. Still, entities in four ‘non-widening’ Member States – Germany, France, Spain, and the Netherlands, in this order – received 50.9% of all Horizon Europe funding. Nonetheless, according to a monitoring report by the Commission<sup>36</sup>, once EU contribution is weighted by national R&D expenditure, beneficiaries from widening Member States received double the amount as beneficiaries from other Member States.

### Number of new programme participants on the rise

Newcomer organisations currently represent a majority of all grant participants: 51%. The share is nonetheless significantly lower than at the end of Horizon 2020, where almost three-quarters of all participants were not recorded in FP7.

**14 365 newcomers** have received **EUR 4.2 billion** in EU contribution. This is about 12% of all funding allocated under Horizon Europe.

Figure 5: Share of new participants, by country category



The discrepancy between the high share of participants and the relatively low share of funding to newcomers is due to the fact that most newcomers are small organisations, joining on average only one or two projects per framework programme. Larger organisations, which participate in many more projects and are also much more likely to be coordinators, are rarely Horizon Europe newcomers: just 4% of universities and 7% of research organisations coordinating projects did not participate in Horizon 2020.

More than half of all private for-profit participants and SMEs are newcomers (56.8%), as are those in the ‘other’ organisations category (e.g. civil society organisations) (59.2%). Around a quarter of higher education institutions in the programme are newcomers (23.7%), but they receive a negligible share of all funding (less than 1%). Among EIC Fund beneficiaries, 67% (165 organisations) are newcomers to Horizon Europe. The amount of EIC Fund investment approved towards newcomers is EUR 1.1 billion (65% of all investments approved by the Fund).

<sup>33</sup> The Widening Member States in Horizon Europe are: Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia, and Slovenia.

<sup>34</sup> Entities from the Horizon Europe 15 ‘widening’ Member States received 15% of the funding going to EU27 beneficiaries - those same 15 MS had received 12% of funding for EU27 beneficiaries in Horizon 2020.

<sup>35</sup> Looking even further back, the Horizon Europe 15 ‘widening’ Member States account for 8% of the total funding in FP7 (cut-off date: 6 January 2025).

<sup>36</sup> European Commission, Country Participation in the EU R&I Framework Programmes: A retrospective on the first three years of Horizon Europe (2021-2023), 2024, <https://data.europa.eu/doi/10.2777/485995>, p. 11.

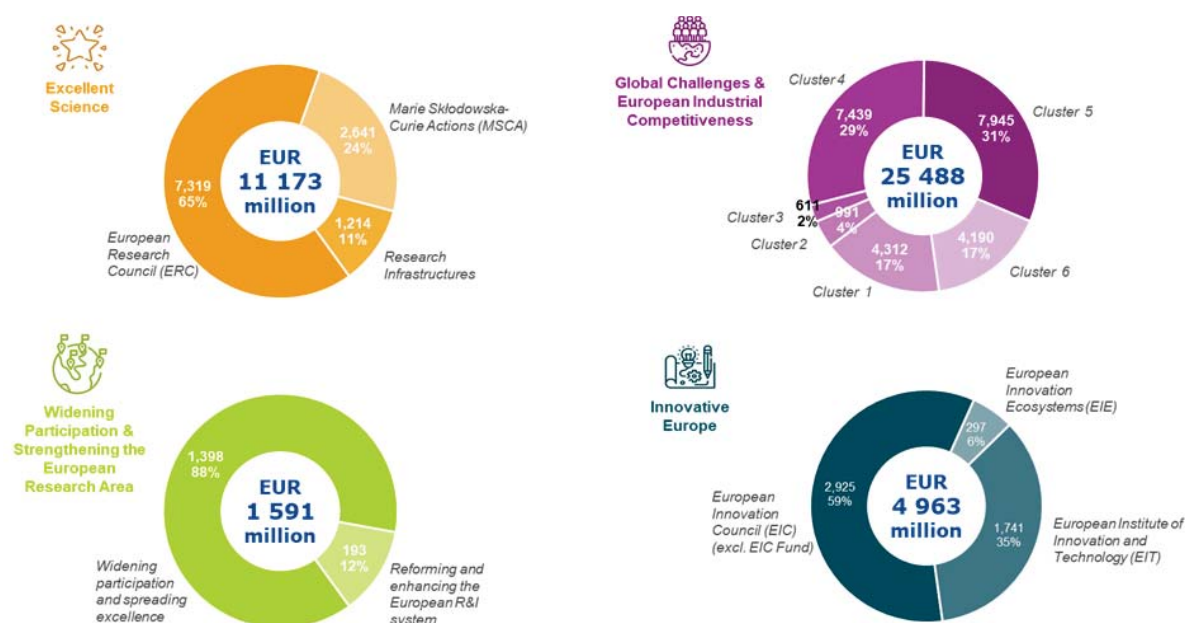
## More collaborative projects and larger grants

More than eight out of every 10 euro went to **collaborative projects**, primarily in Pillar II – representing an increase from 78% in Horizon 2020. The average size of consortia increased from 12 partners in Horizon 2020<sup>37</sup> – to 16 partners in Horizon Europe Pillar II to date.

The average grant size is around **EUR 2.9 million** under Horizon Europe (compared to EUR 1.9 million under Horizon 2020, not adjusting for inflation). The major factors contributing to the larger average grant size are the discontinuation of the phase 1 of the SME instrument which used to award small grants (EUR 50 000 per project) to SMEs, and the introduction of larger grants under the EIC<sup>38</sup>.

The largest share of funding was allocated to Pillar II – Global Challenges and European Industrial Competitiveness (59.0%), of which 60.4% was allocated to the climate and digital clusters of activities. The Excellent Science pillar accounts for 25.9% of the funding, allocated mainly through the European Research Council. The two other pillars share the remaining 15.2% of funding.

Figure 6: Distribution of Horizon Europe funding by pillar and programme part



**Horizon Europe has had a higher success rate than its predecessor, but nevertheless, 7 out of 10 high-quality proposals could not be funded due to the budgetary limitations.**

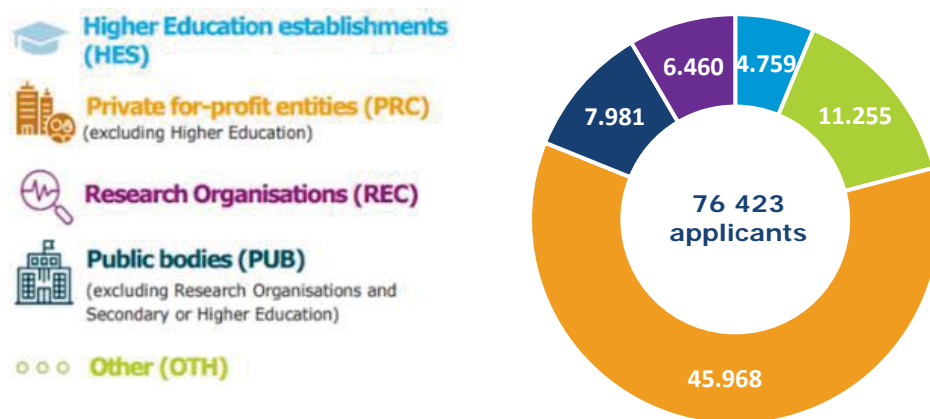
The programme has been very sought after, receiving **88 803 eligible proposals** to 531 fully evaluated calls. On average, each call comprised 4 topics.

<sup>37</sup> Pillars II and III excluding the SME instrument in Horizon 2020.

<sup>38</sup> European Commission, DG for Research and Innovation, SME participation in Horizon Europe, Publications Office of the EU, 2024, p. 10. <https://data.europa.eu/doi/10.2777/576670>



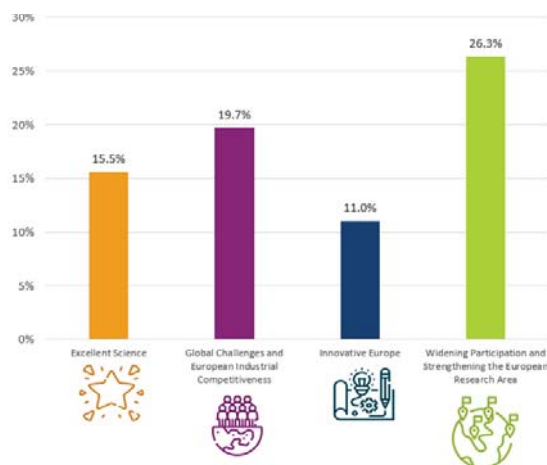
Figure 7: Distribution of Horizon Europe applications by type of organisation



A total of **76 423 applicants** had applied to the programme by 6 January 2025. Each was involved in 6.1 proposals on average. Most applicants were private for-profit entities (45 968) that had applied an average of three times. At the opposite end of the spectrum, 4 759 applicants were from higher education entities, each of which were involved in 37.5 proposals on average. Each research organisation applied an average of 14.4 times.

The **average success rate of proposals has increased** from 12% in Horizon 2020 to 16.4% in Horizon Europe. Success rates vary by pillar, but there are no major differences between country groups. The quality of the proposals has also improved compared to Horizon 2020, 54.6% of them being assessed as high quality by external experts, compared to 46% in Horizon 2020. Only 30.1% of the high-quality proposals could however be funded with the available budget. Even though this is an improvement on Horizon 2020 (25%), an **additional EUR 81.8 billion** (1.9 times the budget allocated to date) would have been needed to fund them all. To promote support through other means at national or regional level, 7 166 of the unfunded proposals have received a Seal of Excellence certificate.

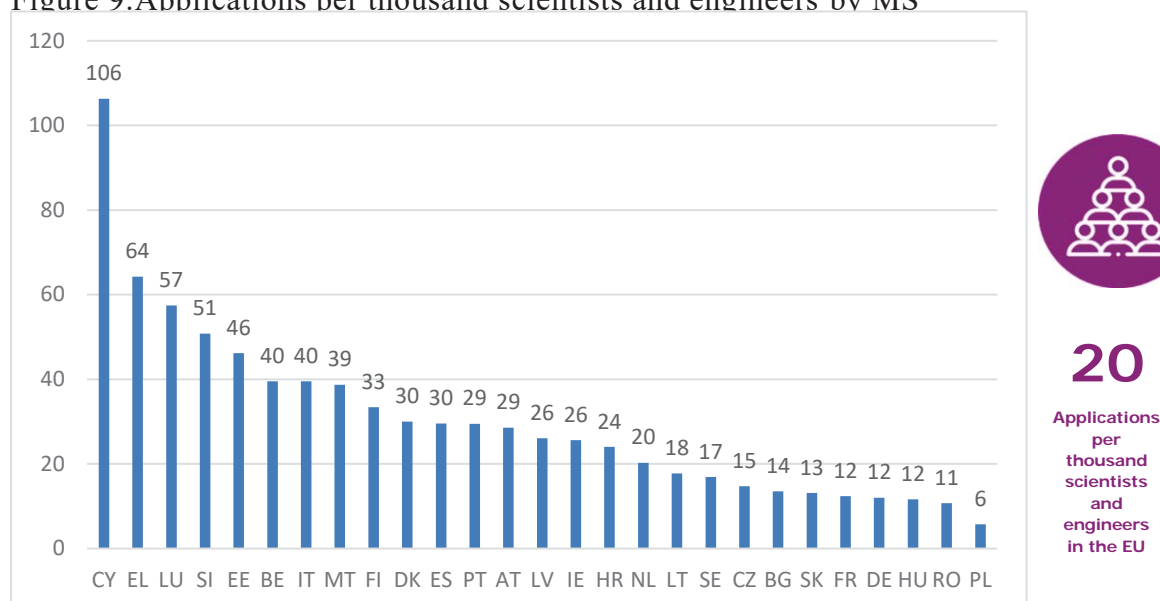
Figure 8: Horizon Europe success rates



## A wider geographical coverage and higher success rates from the widening Member States than in Horizon 2020

The programme received applications with participants from **194 countries**<sup>39</sup>.

Figure 9: Applications per thousand scientists and engineers by MS



Entities located in the 15 **widening Member States** submitted fewer applications than those in the other Member States and accounted for 19.8% of all applications. Some widening Member States (Estonia, Hungary, Lithuania, Slovakia, Slovenia) have an application success rate close to the programme average (20%). It should be noted that the 15 widening Member States are home to 26% of the EU population of scientists and engineers.

**Associated countries** account for 12.6% of applications (mostly the UK, Norway, Türkiye, Israel, and Serbia), while non-associated **third countries** represent 5.6% (mostly Switzerland, US and China). Most associated-country applications were from the United Kingdom (6.1% of total applications and 48.5% of associated-country applications). Although the UK became an Associated Country on 1 January 2024, it is treated as an Associated Country for all grants and proposals from the start of the Programme (2021) in this analysis.

Additional data, including for European Partnerships and EU Missions, is available in Annex 8.

## 4. Evaluation findings

### 4.1 To what extent has Horizon Europe been successful so far and why?

This section provides an evidence-based assessment of the successes and shortcomings of the Horizon Europe programme in terms of its effectiveness, efficiency and coherence. It begins by examining how effectively Horizon Europe has contributed so far to its scientific, societal and economic objectives, as well as the objectives of spreading excellence and widening participation. The section then considers the cost of pursuing these objectives. Finally, it provides evidence of the degree to which the programme has operated in a coherent way, both internally between its different instruments, and externally with other EU and national programmes.

<sup>39</sup> Including Member States (widening and not widening) and third countries (associated and non-associated), see lists in glossary.

#### 4.1.1. Effectiveness: **Towards scientific impacts** – To what extent has Horizon Europe advanced scientific excellence (Key Impact Pathways 1-3)?

This section assesses Horizon Europe’s contribution to the three Key Impact Pathways focusing on ‘Creating high-quality new knowledge’; ‘Strengthening human capital in R&I’; and ‘Fostering diffusion of knowledge and Open Science’.

Figure 10: Scientific impacts of Horizon Europe – Key Impact Pathways 1-3



Source: Annex V to Regulation 2021/695

##### *What messages emerged from the stakeholder consultation?*

The majority of respondents either agreed or strongly agreed with the statement that **Horizon Europe helped to develop, promote and advance scientific excellence** (83%; 1 301). Disaggregating by category of respondent revealed that companies (84%; 225), academic and research institutions (84%; 673) and business associations (87%; 33) deem Horizon Europe to be successful in developing, promoting and advancing scientific excellence. Conversely, 4% (67) of all respondents either disagreed or strongly disagreed with the statement that Horizon Europe helped to develop, promote and advance scientific excellence (67). Among this small minority, respondents from academic / research institutions constitute the largest proportion, representing 69% (46).

#### *Creating high-quality new knowledge (Key Impact Pathway 1)*

As of 6 January 2025, Horizon Europe beneficiaries reported 6 922 peer-reviewed scientific publications that had been validated by the Commission departments. Excluding the publications reported by the Joint Research Centre, Horizon Europe projects reported 4 299 peer-reviewed publications. Under Horizon 2020, at a comparable stage of advancement<sup>40</sup> and excluding publications under the direct actions of the JRC, beneficiaries had reported 2 827 validated peer-reviewed publications.

In past framework programmes, publications were mainly reported once the projects had been closed. For example, under Horizon 2020, grantees reported approximately 245 000 peer-reviewed scientific publications<sup>41</sup>, 43% of which were reported in 2021 or later, when the implementation period of Horizon 2020 had ended.

The R&I framework programme continues to support excellent science – between 1985<sup>42</sup> and 2023, it supported 35 Nobel Prize winners<sup>43</sup> - two more than were reported in the *ex post* evaluation of Horizon 2020.

##### *What messages emerged from the stakeholder consultation?*

Stakeholders share the view that **scientific publications** have the highest potential impact on disseminating and exploiting results vis-à-vis workshops, events, project websites, patents and Commission exploitation support services: 68% (1 056) of respondents indicated that scientific publications help to a great extent to disseminate

<sup>40</sup> 31 March 2017, i.e. 3 years and 3 months after the start of the programme.

<sup>41</sup> Figure from Commission monitoring systems (CORDA), 2 December 2024.

In line with the Key Impact Pathways’ methodology, the figure only encompasses peer-reviewed publications that the Commission could match to an external database for verification (Scopus). This verification step was not carried out in the past, including at the time of the final evaluation of Horizon 2020. The figure for Horizon 2020 might still change in the future as the matching methodology is improved and more publications are matched.

<sup>42</sup> 1985 is the second year of the existence of the Framework Programme for Research and Innovation.

<sup>43</sup> Programme Performance Statement, June 2024.

and exploit results. Research institutions and citizens deem scientific publications most useful (approximately 75% of each group: 596 and 160 respondents respectively). Conversely, business associations and companies saw less potential for scientific publications, with less than 10% indicating that they only helped a little or not at all to disseminate and exploit results (8% (3) and 7% (17) respectively).

### *Strengthening human capital in R&I (Key Impact Pathway 2)*

A total of 95 156 researchers are benefiting from upskilling activities under Horizon Europe, of which 44.14% are women. In addition, MSCA have registered 8 307 researchers benefitting from mobility grants, while the ERC has registered 1 662 such researchers. The EIT KICs also contribute to this KIP through the upskilling/reskilling of the workforce within strategic value chains. More data is available in the EIT dedicated section below.

### *Fostering diffusion of knowledge and open science (Key Impact Pathway 3)*

A total of 10 222 publications – including non-peer-reviewed scientific articles – have been reported so far under Horizon Europe, over 79% of which are reported by beneficiaries as available in open access (OA)<sup>44</sup>. This is a moderate increase compared to Horizon 2020, which had 69.8% at the same stage of advancement.

Horizon Europe's mechanisms for driving the uptake of open science at national level include: 1) supporting the development of knowledge and tools on open science; 2) supporting the development of research and technology infrastructures, environments and platforms that enable open access practices; and 3) inspiring the uptake of open science practices through guidelines, the requirements of the FP and participation in Missions and consensus-building activities<sup>45</sup>.

- Clusters 1, 2, 5 and 6 have promoted open access in the work programmes, but as many projects are still at an early stage it is premature to provide feedback on open-source matters<sup>46</sup>.
- Cluster 3, and to a lesser extent Cluster 4, have more restrictions than other clusters, that apply to sensitive actions that use classified background information and/or produce security-sensitive results<sup>47</sup>.

The main barrier to publishing in open access is accessing sufficient funds to pay for the fees required by some journals or data repositories<sup>48</sup>. The Horizon Europe Regulation states that if the results are not exploited within a given period, the beneficiary shall use an online platform to find interested parties to exploit those results<sup>49</sup>. In 2021, the European Commission created Open Research Europe<sup>50</sup>, a free open access publishing platform for European Commission-funded researchers across all subject areas. As of October 2024, over 750 peer-reviewed publications and 1 500 peer-reviews are available on the platform. Over 1600 authors from nearly 1000 institutions have published in Open Research Europe.

#### *What messages emerged from the stakeholder consultation?*

Over a third (35%; 535) of respondents indicated that **open science activities** for early sharing of results help to disseminate, exploit and access research and innovation results to a great extent. This view is particularly prevalent among non-EU citizens (51%; 18), followed by EU citizens (39%; 73) and academia (38%; 299). Overall, 73% of all respondents (1 114) indicated that open science activities either helped either to a great extent, somewhat or a little. Only 4% (56) held the view that open science activities did not help to disseminate, exploit

<sup>44</sup> Verification of the self-reported data against external data sources was still in progress at the time of this evaluation. The share does not include all JRC publications, 81% of which are published in open access.

<sup>45</sup> Excellent Science evaluation study, 2024, section 4.1.1.4, <https://data.europa.eu/doi/10.2777/2295765>

<sup>46</sup> Resilient Europe evaluation study, section 7.6, <https://data.europa.eu/doi/10.2777/797281>. Green Transition evaluation study 3.6.1.2, p. 69, <https://data.europa.eu/doi/10.2777/67934>

<sup>47</sup> Ibid.

<sup>48</sup> Excellent Science evaluation study, 2024, Executive Summary, p. 2, <https://data.europa.eu/doi/10.2777/7542049>

<sup>49</sup> See Art. 39, Regulation (EU) 2021/695 establishing Horizon Europe.

<sup>50</sup> <https://open-research-europe.ec.europa.eu/>

and access R&I results at all. 23% of all respondents indicated that they either do not know or do not hold any views on the matter (355).

### *European Research Council (ERC)*

According to statistics provided by ERCEA, Horizon Europe ERC grantees have published 2 181 peer reviewed scientific publications by the end of 2024<sup>51</sup>.

One of the objectives of Horizon Europe has been to attract talent to Europe. In the programme's first 4 years, around 2% of applicants to the ERC's schemes came from non-associated countries<sup>52</sup> and they made up nearly 1.5% of successful ERC applicants taking up a grant<sup>53</sup>. Almost half of these grantees came from the US, followed by Australia, India, South Africa, Cameroon and Uganda.

In addition, the survey and the interviews with ERC beneficiaries confirmed the impacts of obtaining an ERC grant on principal investigators (PIs) and their research teams<sup>54</sup>. The main effects cited by interviewees include strengthening their reputation as a researcher, the capacity to conduct frontier research, and the possibility to establish and consolidate their own research group. In addition, according to the survey, ERC grants give PIs the opportunity to improve their skills, mostly in project and people management, as well as in scientific methods and/or techniques. Intersectoral mobility among ERC beneficiaries is very limited, but international mobility opportunities are highly appreciated<sup>55</sup>.

### *Marie Skłodowska-Curie actions (MSCA)*

A total of 65 000 researchers are expected to benefit from MSCA under Horizon Europe, including 25 000 PhD candidates<sup>56</sup>. Of these, MSCA reports more than 8 300 researchers to have already been recruited under Horizon Europe. The MSCA also contribute to producing excellent science through peer reviewed scientific publications (361; 5% of all publications reported under KIP 1).

Postdoctoral fellows benefitting from the MSCA particularly value the freedom to pursue their specific research agendas (91%<sup>57</sup>) and the opportunity to engage in fundamental research (86%)<sup>58</sup>. Moreover, 95% of MSCA postdoctoral fellows affirm that the opportunities provided align with their need to improve their skills and competencies<sup>59</sup>. Countries with the most advanced and attractive research systems continue to host the largest shares of researchers. As with Horizon 2020, the programme also continues to support fellows in returning to their home countries, particularly Greece, Italy, Cyprus and Spain.

<sup>51</sup> The number follows a different methodology from the KIP 1 short-term indicator reported above and should not be counted as a percentage of the latter. Specifically, it is calculated based on the continuous reporting system of projects, which is in principle more up to date but may be subject to revisions when 'official' periodic reports are submitted.

<sup>52</sup> Applicants from Switzerland and the UK have been excluded from this analysis as these were not associated countries in 2021-2023.

<sup>53</sup> Figure from Commission monitoring systems (CORDA), 6 January 2025.

<sup>54</sup> Excellent Science evaluation study, 2024, Annex 1 – executive summary – ERC, pp. 20-21. <https://data.europa.eu/doi/10.2777/9552959>

<sup>55</sup> Ibid, Annex 1 1.3, p. 55. 61% of responding beneficiaries (146 out of 241) stated that their ERC project responds to a 'very large' or 'large' extent to their needs for international mobility opportunities.

<sup>56</sup> Performance tables of the annual mid-term and annual activity reports, as well as the Horizon programme performance statement (PPS), [https://commission.europa.eu/document/download/95839d74-fc50-4ea5-81c9-854efefb7eed\\_en?filename=eac\\_mp\\_2024.pdf](https://commission.europa.eu/document/download/95839d74-fc50-4ea5-81c9-854efefb7eed_en?filename=eac_mp_2024.pdf), p. 35.

<sup>57</sup> Excellent Science evaluation study Annexes, p. 22. 804 survey respondents. For all MSCA PF applicants: 65%, 1820 survey respondents.

<sup>58</sup> 705 survey respondents. For all MSCA PF applicants: 60%, 1671 survey respondents.

<sup>59</sup> Ibid. 782 survey respondents. For all MSCA PF applicants: 74%, 2 047 survey respondents.



According to the survey, 75% of MSCA postdoctoral fellows are satisfied with the supervision provided and agree that the arrangements in place are clearly defined<sup>60</sup>. Nine out of 10 surveyed researchers report that participating in the programme helped them obtain a research position with better career prospects (87%)<sup>61</sup>. A majority of respondents also expect their Horizon Europe project to improve the working conditions of researchers<sup>62</sup> and the provision of career advice<sup>63</sup>. For quality and transparency of recruitment practices, the trend is similar, although slightly lower among staff exchanges participants<sup>64</sup>. Interviewees pointed to measures such as providing more stable job contracts and improving salary conditions as the MSCA benefits that improved the competitiveness of their organisations the most<sup>65</sup>.

Overall, MSCA postdoctoral fellows consider host organisations to be highly committed to improving the stability of researchers' jobs (60%)<sup>66</sup> while noting challenges to keep the MSCA allowances competitive. Since the time of the survey, salaries have already been revised. The need for improved communication on fellowship and grant details before projects commence has also been noted by fellows<sup>67</sup>.

Successful applicants regard MSCA projects as an effective means to create or enhance collaborations with leading research organisations. Notably, 89% of MSCA beneficiary organisations<sup>68</sup> believe that their participation in the programme significantly strengthens their relationship with leading research organisations in Europe and beyond. For MSCA postdoctoral fellows, the programme provides ample opportunities for interdisciplinary cooperation<sup>69</sup>. The MSCA continues to successfully attract well-networked organisations with a long-standing tradition of scientific excellence, with the top 1% most networked entities accounting for 29.6% of total participations in the programme, surpassing the Horizon Europe average of 22.1%<sup>70</sup>.

### *Research infrastructures*

Research infrastructures (INFRA) supports the roadmap of the European Strategy Forum for Research Infrastructures (ESFRI), outlining the essential RIs needed in Europe for the next 10-20 years. INFRA funds various phases of ESFRI projects, including design studies, preparatory phases, and implementation phases. However, many interviewees and survey respondents consider the existing funding for RI development to be insufficient<sup>71</sup>. Problems with the lack of funding for the maintenance or sustainability of infrastructure reported in the final evaluation of Horizon 2020<sup>72</sup> still persist.

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<sup>60</sup> Ibid. 612 survey respondents.

<sup>61</sup> Ibid. 719 survey respondents.

<sup>62</sup> 51% of 326 DN respondents. 53% of the 112 staff exchange (SE) respondents. 100% of 8 COFUND respondents. Not applicable/unknown and blank responses excluded. Excellent Science evaluation study annexes, p. 310.

<sup>63</sup> 65% of 327 DN respondents. 60% of the 111 SE respondents. 88% of 8 COFUND respondents. Not applicable/unknown and blank responses excluded. Excellent Science evaluation study annexes, p. 310.

<sup>64</sup> 57% of the 333 DN respondents. 48% of the 103 SE respondents and 100% of the 8 COFUND respondents. Not applicable/unknown and blank responses excluded. Excellent Science evaluation study annexes, p. 310.

<sup>65</sup> Excellent Science evaluation study annexes, p. 312.

<sup>66</sup> Ibid, p. 22. 495 survey respondents.

<sup>67</sup> Excellent Science study Phase 2 (HE), Annexes, p. 108. The country correction coefficients, also mentioned by stakeholders, were revised in 2024: <https://data.europa.eu/doi/10.2766/344144>

<sup>68</sup> 432 survey respondents from MSCA DN, SE and COFUND actions. Excellent Science evaluation study annexes, p. 313.

<sup>69</sup> 77% of 628 survey respondents agree with this statement, Excellent Science evaluation study annexes p. 22. For all MSCA PF applicants: 60%, 1 656 survey respondents.

<sup>70</sup> Ibid, p. 24.

<sup>71</sup> Ibid, p. 28.

<sup>72</sup> SWD(2024) 29 final, pp. 77-78, [https://eur-lex.europa.eu/resource.html?uri=cellar:b5a1da8b-be92-11ee-b164-01aa75ed71a1.0001.02/DOC\\_1&format=PDF](https://eur-lex.europa.eu/resource.html?uri=cellar:b5a1da8b-be92-11ee-b164-01aa75ed71a1.0001.02/DOC_1&format=PDF)

This programme part aims to foster collaboration among RIs and to ensure accessibility for researchers across Europe. Changes made under Horizon Europe include discontinuing integrating activities (INFRAIA) grants and introducing the more challenge oriented INFRASERV grants for the provision of access. INFRASERV topics bring together more heterogeneous RIs than INFRAIA and aim to better address societal challenges. Typically, INFRASERV grants integrate two or more past INFRAIA RI communities. For example, the canSERV project<sup>73</sup> integrates more than 130 access providers, including providers from 13 pan-European life sciences RIs to support cancer research. Another example is the AQUARIUS project<sup>74</sup>, which supports Mission Ocean by providing free access to a diverse portfolio of European RIs, including research vessels, marine observation platforms, aircraft, drones, satellites and more. Interviewees expressed concerns about these changes, notably the complexity of project coordination, the fragmentation of funding and the sustainability of the services developed beyond the lifetimes of individual projects<sup>75</sup>. Interviewees indicated the need for a longer-term vision for the integration of RIs. However, the full impact of these changes will need to be assessed over a longer period of time.

INFRA plays an important role in the development of the **European Open Science Cloud (EOSC)**. While advances are being made on FAIR data and the creation of new services, interviewees<sup>76</sup> expressed concerns about two issues which are already being addressed:

- The first is the lack of synchronisation between projects, potentially leading to a duplication of efforts and unexploited synergies. To address this, the INFRA work programme includes two topics (in 2021 and 2024) with dedicated activities for coordination among INFRAEOSC projects. The Commission also organises annual ‘concertation’ meetings of INFRAEOSC projects in order to further support coordination and the development of synergies.
- The second is the discontinuation of dedicated funding for the science clusters. Interviewees consider these clusters to be a key platform through which RIs of the same scientific discipline can collaborate, which in turn enables integration of RI services and data into the EOSC.

### *Pillar II contributions to Excellent Science*

Scientific excellence is a primary evaluation criterion for Pillar II projects.

In addition to the main generators of peer reviewed publications (the ERC and JRC, both detailed above), Pillar II has generated 3 026 peer-reviewed publications. The largest share comes from Cluster 4 (Digital, industry, and space) with 1 453 publications. This is followed by Cluster 1 (Health) with 478 publications, and Cluster 5 (Climate, energy, and mobility) with 420 publications. Cluster 6 (Food, bioeconomy, natural resources, agriculture, and environment) has produced 430 publications. Cluster 2 (Culture, creativity, and inclusive society) and Cluster 3 (Civil security for society) contribute the fewest publications, 130 and 132 respectively. The lower number of publications for Cluster 2 and 3 is consistent with their lower funding expenditure, as together they contribute 5% of the pillar II budget.

### *Joint Research Centre’s direct research actions*

According to a bibliometric study<sup>77</sup> that analysed the JRC’s publications indexed by Scopus between 2018 and 2022, JRC publications are cited 2.26 times the world average<sup>78</sup>, similar to

<sup>73</sup> <https://cordis.europa.eu/project/id/101058620>

<sup>74</sup> <https://cordis.europa.eu/project/id/101130915>

<sup>75</sup> Excellent Science study annex, 2024, p. 26, <https://data.europa.eu/doi/10.2777/9552959>.

<sup>76</sup> Ibid, p. 26.

<sup>77</sup> Costa Dantas Faria, J., Hristova, M.A. and Lehto, S., Bibliometric analysis of JRCs research performance using Scopus-Scival tools 2018-2022, European Commission, 2024, JRC136476.

<sup>78</sup> 2014-2018: 2.34, 2016-2020: 2.27.

prestigious institutions such as the University of Oxford. The results were similar during the Horizon 2020 programming period. Moreover, the JRC publishes in top journals<sup>79</sup>, with 45.4% in the top 10% most cited category and 6.6% in the top 1%, showing a significant increase from 37.1% and 2.1% respectively for the first 5 years of Horizon 2020.

Collaboration is a key aspect of the JRC's work, with 82% of publications involving authors from other organisations. Under Horizon Europe, the JRC joined as an associated partner for 32 collaborative projects under Pillars I and II. Of these, it joined 24 projects from Clusters 2, 4, 5 and 6, hosted three doctoral networks and three postdoctoral fellowships under MSCA, and provided research infrastructure in two pan-European research consortia<sup>80</sup>.

In addition, a panel of independent experts<sup>81</sup> provided a positive assessment of the JRC, acknowledging its relevance, high-quality work and agility in addressing new challenges. Examples of JRC's expertise in support of policy-making include:

- **The EU digital policies:** JRC studies on technological and organisational enablers for data sharing in the EU informed the Data Act<sup>82</sup>, while the estimation of benefits from interoperability informed the impact assessment of the Interoperable Europe Act<sup>83</sup>.
- **Monitoring and measuring climate action:** In 2024, the Commission presented its recommendation for a 2040 climate target to reduce net greenhouse gas emissions by 90% relative to 1990 levels, with an impact assessment of possible pathways to reach climate neutrality by 2050<sup>84</sup>. The impact assessment was underpinned by the JRC's quantitative scenario analysis on the policy options.
- **Green Deal industrial plan:** JRC studies on supply chains and recycling potential<sup>85-86</sup> and its Raw Materials Information System<sup>87</sup> were used to track supply and demand for shaping the Critical Raw Materials Act<sup>88</sup>. For the Net-Zero Industry Act, the JRC provided analysis and recommendations on strategic infrastructure investment needs, industrial development and clean tech policies for key strategic net-zero technologies (notably batteries, electrolyzers, solar energy, onshore wind and offshore renewables, sustainable biogas and biomethane, carbon capture and storage, heat pumps and geothermal, and grids)<sup>89</sup>.

<sup>79</sup> Costa Dantas Faria, J., Hristova, M.A. and Lehto, S., European Commission, Bibliometric analysis of JRCs research performance using Scopus-Scival tools 2018-2022 4, p. 26.

<sup>80</sup> Based on Horizon Dashboard data, R&I organisation profiles

[https://dashboard.tech.ec.europa.eu/qs\\_digit\\_dashboard\\_mt/public/sense/app/dc5f6f40-c9de-4c40-8648-015d6ff21342/overview](https://dashboard.tech.ec.europa.eu/qs_digit_dashboard_mt/public/sense/app/dc5f6f40-c9de-4c40-8648-015d6ff21342/overview)

<sup>81</sup> Heuer, R.-D., et al., Interim evaluation of the activities of the Joint Research Centre under Horizon Europe and Euratom 2021-2025 - Final report of the evaluation panel, Publications Office of the European Union, 2023.

<sup>82</sup> SWD/2022/34 final. Reference to JRC: pp. 23, 27, 43, 138.

<sup>83</sup> SWD/2022/721 final. Reference to JRC: pp. 12-13, 18, 21, 33-34, 48-49, 54, 62, 64, 85, 87, 90, 94, 96-98.

<sup>84</sup> SWD(2024) 63 final. Reference to JRC: Part 1, pp. 10, 52-54, 67-69, 87, 92-95, 122; Part 2, pp. 3-5, 7-12, 15-16, 30, 45-47, 83, 97-98, 100, 109, 120; Part 3, pp. 20, 30, 118-119, 122, 131, 143, 151-153, 193-198, 207-210, 214-216, 218, 232-233; Part 3, pp. 9, 11, 15, 23-24, 36, 52, 58; Part 5, pp. 6.

<sup>85</sup> Carrara, S. et al., Supply chain analysis and material demand forecast in strategic technologies and sectors in the EU – A foresight study, Publications Office of the European Union, 2023.

<sup>86</sup> Tazi, N. et al., Initial analysis of selected measures to improve the circularity of critical raw materials and other materials in vehicles, Publications Office of the European Union, 2023.

<sup>87</sup> <https://rmis.jrc.ec.europa.eu/>

<sup>88</sup> (i) Proposal for a Regulation COM(2023)160final, p.1; (ii) SWD/2023/161/FINAL, pp.116-117, 160, 173.

<sup>89</sup> (i) Proposal for a Regulation COM(2023) 161 final. Reference to JRC: p. 10; (ii) SWD(2023) 68 final. Reference to JRC: pp.27, 50-58, 74, 76, 103, 109; iii) SWD(2023) 219 final. Reference to JRC: pp. 13, 83, 84 and 94.



#### 4.1.2. Effectiveness: **Towards ‘societal impacts’** – To what extent has Horizon Europe increased the R&I contribution to address global challenges (Key Impact Pathways 4-6)?

This section assesses Horizon Europe’s contribution to the Key Impact Pathways focusing on societal impact: ‘Addressing EU policy priorities & global challenges through R&I’; ‘Delivering benefits and impact via R&I missions’; and ‘Strengthening the uptake of R&I in society’.

Figure 11 - Societal impacts of Horizon Europe – Key Impact Pathways 4-6



Source: Annex V to Regulation 2021/695

#### *Addressing EU policy priorities and global challenges through R&I (Key Impact Pathway 4)*

By mid-2024, beneficiaries mobilised EUR 7.42 billion of their own funds to address SDGs, and EUR 6.08 billion of their own funds to support climate-relevant projects. A total of 9 463 publications were linked to SDGs and 8 827 are climate-relevant in that they support EU policy priorities and address global challenges through R&I. Regarding innovative outputs, 3 570 were linked to SDGs, and 2 893 were climate-related.

Of the projects supported under Horizon Europe, the biggest proportion focused on **SDG3 - Good health and well-being (44%)**, followed by **SDG7 - Affordable and clean energy (24.2%)**, **SDG9 - Industry, innovation and infrastructure (22.9%)**, and **SDG16 - Peace, justice and strong institutions (21%)**<sup>90</sup>. Climate action (SDG13) is no longer in the top four, whereas the coverage of SDG3, SDG7 and SDG16 increased so far compared to Horizon 2020 (from 26% to 44%, from 12% to 24%, and from 6% to 21%, respectively)<sup>91</sup>.

Effectiveness in contributing to EU policy priorities:

- **Climate action:**

- The climate contribution of Horizon Europe was 35% by the end of 2023<sup>92</sup>. By comparison, the contribution of the previous framework programme, Horizon 2020, was 32%, falling short of the 35% target<sup>93</sup>.
- 65% of Horizon Europe call topics on climate science in Cluster 5 between 2021 and 2024<sup>94</sup> should contribute to the Intergovernmental Panel on Climate Change (IPCC)’s work by improving climate, adaptation and mitigation knowledge and projections. The results of these projects are not yet available. The previous two framework programmes were identified as the second most frequently acknowledged funding source of the

<sup>90</sup> Innovative Europe external evaluation study, Annex 6.3 on ‘Sustainable Development Goals (SDG) Analysis’, forthcoming in 2024, p. 400. More detail can also be found in the dedicated section on SDGs in the PPS.

<sup>91</sup> Ibid, p. 401 and 405. The comparison between Horizon Europe and Horizon 2020 is subject to methodological limitations (see Annex 2 of this SWD).

<sup>92</sup> According to the DG BUDG Climate Dashboard data as of 27 January 2025. This is based partly on preliminary estimates and continuous monitoring of Horizon Europe’s climate mainstreaming efforts, therefore data is subject to yearly revisions as the programme evolves. The data is currently being revised and might be updated in future Programme performance statements.

<sup>93</sup> SWD(2024) 29 final, p. 22.

<sup>94</sup> [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-8-climate-energy-and-mobility\\_horizon-2021-2022\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-8-climate-energy-and-mobility_horizon-2021-2022_en.pdf), [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-8-climate-energy-and-mobility\\_horizon-2023-2024\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-8-climate-energy-and-mobility_horizon-2023-2024_en.pdf)

research referenced in the IPCC's 6th Assessment Cycle reports, with over 4 500 publications cited, coming from over 1 200 projects<sup>95</sup>.

- Spending on **biodiversity** increased from 7.9% in 2021 to 8.7% in 2023<sup>96</sup>. According to Horizon Europe's legal basis, the programme should contribute to the overall ambition of directing 7.5% of annual spending under the MFF towards biodiversity objectives in 2024 and 10% in 2026 and 2027<sup>97</sup>.
- Although there is no specific target determined for spending on **clean air objectives**, the Commission is obliged to report on Member States' uptake of EU funds to achieve the objectives of Directive (EU) 2016/2284 on the reduction of national emissions of certain atmospheric pollutants. From 2021 to 2024, the committed contribution of Horizon Europe to clean air is estimated at EUR 3 762.9 million (4%)<sup>98</sup>.
- Horizon Europe investments in the **digital transformation** for 2021-2023 are estimated at up to EUR 14 053.2 million, or 33% of the Horizon Europe budget for these years (compared to 32% under Horizon 2020)<sup>99</sup>.
- Horizon Europe investments in **security** (Cluster 3) supported the EU's commitment to ensuring the EU's civil **security resilience** of citizens and critical infrastructure, and establishing a common culture for disaster preparedness<sup>100</sup>.

*What messages emerged from the stakeholder consultation?*

Overall, 60% of respondents (928) agreed or strongly agreed that Horizon Europe supports access to and uptake of innovative solutions by European industry and society to address global challenges, including climate change and the SDGs. This view was held most strongly among business associations (79%; 30), followed by non-EU citizens (70%; 23) and companies (69%; 183). EU citizens agreed to a lesser extent: 55% (105) (strongly) agreed with the statement, corresponding to a 15-percentage point difference from non-EU respondents.

### *Delivering benefits and impact via R&I missions (Key Impact Pathway 5)*

**EU Missions, of which there are five, are a new feature of Horizon Europe. They aim to address societal challenges and boost the impact of the programme.** Following the submission of reports<sup>101</sup> from the five Mission Boards, they were launched in September 2021 in the form of a Commission Communication<sup>102</sup>. Since then, the Missions have developed activities funded through three Horizon Europe work programme parts (2021-2023), accounting for 10% of the Pillar II budget.

Projects related to EU Missions have led to 33 peer-reviewed scientific publications and 1 intellectual property rights (IPR) output. A total of 87 innovative products, processes, and methods have been developed under the projects. In addition, in 38 mission projects (representing 66.7% of the total), citizens or end-users were involved in the co-design of R&I content (compared to 48.7% programme-wide, reported below under KIP 6).

In January 2024, the Commission expert group supporting the monitoring of EU Missions found that 'faster and deeper integration of Missions with national systems and processes has occurred in cases where the Mission's objectives are closely aligned to pre-existing European and national policy strategies, and when the introduction of EU Missions has overlapped with national policy

<sup>95</sup> SWD (2024) 29 final on the *ex post* evaluation of Horizon 2020, p. 39.

<sup>96</sup> Horizon Europe programme statement, quoted in [COM\(2024\) 231 final](#)

<sup>97</sup> Regulation (EU) 2021/695, recital point 76.

<sup>98</sup> Clean air overview 2024, from June 2024, [https://commission.europa.eu/document/download/52cb8a30-ab44-4973-8776-1b97f74bb503\\_en?filename=Budget%20contribution%20-%20clean%20air\\_0.pdf](https://commission.europa.eu/document/download/52cb8a30-ab44-4973-8776-1b97f74bb503_en?filename=Budget%20contribution%20-%20clean%20air_0.pdf)

<sup>99</sup> Ibid. Tracker based on the *intent* of the action.

<sup>100</sup> Resilient Europe evaluation study, 2024, p. 52. <https://data.europa.eu/doi/10.2777/797281>

<sup>101</sup> [https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data/publications/all-publications/foresight-reports-missions-horizon-europe\\_en](https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data/publications/all-publications/foresight-reports-missions-horizon-europe_en)

<sup>102</sup> COM(2021) 609 final. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52021DC0609>

planning cycles. In terms of concrete actions, most countries are at the early stages in their contributions to EU Missions'<sup>103</sup>. For the evaluation at hand, the Mission secretariats provided data on progress towards their goals:

As of the end of 2024, the EU Mission **'Restore our ocean and waters by 2030'** is supporting 225 demonstration sites to prepare the ground for the uptake by national and regional actors of the proposed solutions:

- 122 demo sites in projects selected/running under Specific Objective 1 on marine protection and restoration, and restoration of inland waters.
- Another 55 demo sites in projects selected/running under Specific Objective 2 on preventing and eliminating pollution (microplastics, nutrients and chemicals).
- 29 demo sites in projects selected/running under Specific Objective 3 on greenhouse gas emissions from maritime economic activities in the EU, zero-carbon and low impact aquaculture, low-carbon multi-purpose use of marine and water space.
- 19 demonstrators in projects selected/running that contribute to the development of the 'digital twin ocean', a multi-dimensional and near real-time virtual representation of the ocean. The digital twin combines ocean observations, artificial intelligence, and advanced modelling operating on high-performance computers, and is accessible to all<sup>104</sup>.

These results are available on the Mission Ocean and Waters Monitoring dashboard<sup>105</sup>.

**The Mission 'A Soil deal for Europe'** (Mission Soil) aims to *'establish 100 living labs and lighthouses leading the transition towards healthy soils by 2030'*. The first 25 living labs have been set-up. The encompass around 250 real-life testing sites and involve 167 partners, 25% of which are from private sector, in 11 Member States. They take a bottom-up research approach that is place-based and collaborative, engaging stakeholders to address specific soil health needs and challenges in real-world settings. Although the list of living labs and lighthouses has not been published, numbers were provided by the Mission secretariat for this evaluation. Similar or higher numbers are expected under current and future annual work programmes. High-performing living labs sites will be designated as 'lighthouses' on a rolling basis, starting in 2025, based on criteria from the Mission implementation plan (undergoing refinement)<sup>106</sup>.

Mission Soil has also contributed to key EU policies, including the proposal for a directive on soil monitoring and resilience. A key tool for such policy support is its Soil Health Dashboard<sup>107</sup>, launched in March 2023, which provides an overview of soil health in the EU using 19 indicators. It covers the whole EU territory and covers some of those indicators for the first time (i.e. concentrations of heavy metals).

**The Mission '100 Climate-Neutral and Smart Cities by 2030'** has also made progress:

- In 2022, 100 cities<sup>108</sup> from 27 MS were *selected* to participate in the Cities Mission, as well as 12 cities from associated countries (out of a total of 377 interested cities)<sup>109</sup>.

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<sup>103</sup> Karo, E., Barajas, A., Sarvaranta, L. et al., Final report of the Commission expert group to support the monitoring of EU missions, Publications Office of the EU, 2024, p. 7. <https://data.europa.eu/doi/10.2777/076494>

<sup>104</sup> <https://digitaltwinoccean.mercator-ocean.eu/>

<sup>105</sup> <https://projects.research-and-innovation.ec.europa.eu/en/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/restore-our-ocean-and-waters/monitoring-dashboard>

<sup>106</sup> European Commission, Mission Soil implementation plan, pp. 31-32, and Annex D, p. 74. [https://mission-soil-platform.ec.europa.eu/sites/default/files/2023-07/soil\\_mission\\_implementation\\_plan\\_final\\_for\\_publication.pdf](https://mission-soil-platform.ec.europa.eu/sites/default/files/2023-07/soil_mission_implementation_plan_final_for_publication.pdf)

<sup>107</sup> <https://esdac.jrc.ec.europa.eu/esdacviewer/euso-dashboard/>

<sup>108</sup> EU missions, 100 climate-neutral and smart cities – Cities on a journey to climate neutrality, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/169604>

<sup>109</sup> [https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/climate-neutral-and-smart-cities\\_en](https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/climate-neutral-and-smart-cities_en)

- By October 2024, 53 of these cities<sup>110</sup> had received the *Mission label*, meaning that their ‘climate city contracts’ were completed and assessed positively by the Commission.
- In addition to those with climate city contracts, 104 participating cities<sup>111</sup> are exploring innovative approaches to accelerate their climate transitions with funding from a pilot programme.
- As of November 2024, no cities have been designated by the Mission as climate neutral and smart. Cities with a Mission label have 5-6 years to work towards becoming climate neutral and smart<sup>112</sup> along the lines set out in their climate city contracts.

**The Mission on adaptation to climate change** is progressing towards its goal of ‘supporting 150 European regions and communities becoming climate resilient by 2030’:

- As of November 2024, the Mission is supporting 145 regions in accelerating their adaptation efforts. Of these, 32 regions are receiving financial support to assess their climate risk, 40 are receiving financial support to develop their pathways to climate resilience, 58 are receiving technical assistance to develop their adaptation plans, and 18 have already received the full range of support.
- 200 regions / local authorities are participating in projects funded by the Mission. Of these, 162 are participating in projects where they test and demonstrate innovative adaptation solutions. For example, the CLIMATEFIT project<sup>113</sup> helps Mission participants to develop investment strategies and mobilise financial resources.

Although the list of regions and communities has not been published, the Mission secretariat provided the figures for this evaluation.

The Mission has produced guidance<sup>114</sup>, tools<sup>115</sup>, and data<sup>116</sup>, and has supported the implementation of innovative solutions<sup>117,118</sup>. Much of the support is provided on the Climate ADAPT portal and through the Mission Adaptation Community<sup>119</sup>. For example, participating as a leading demonstration site in the ARCADIA project<sup>120</sup> enabled the region of Emilia-Romagna (Italy) to exchange information with other regions, raise awareness among local policymakers about climate adaptation, and explore improvements to its water network management<sup>121</sup>.

The EU Cancer Mission’s goal is to **‘improve the lives of more than 3 million people by 2030 through prevention, cure and for cancer patients, including their families, to live longer and better’**. While the number of people whose lives have been improved cannot yet be reported, progress towards the goal is as follows:

<sup>110</sup> [https://ec.europa.eu/commission/presscorner/api/files/document/print/en/ip\\_23\\_4879/IP\\_23\\_4879\\_EN.pdf](https://ec.europa.eu/commission/presscorner/api/files/document/print/en/ip_23_4879/IP_23_4879_EN.pdf), [https://managenergy.ec.europa.eu/managenergy-discover/news/23-cities-awarded-eu-mission-label-their-efforts-towards-climate-neutrality-2024-04-08\\_en](https://managenergy.ec.europa.eu/managenergy-discover/news/23-cities-awarded-eu-mission-label-their-efforts-towards-climate-neutrality-2024-04-08_en) and [https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/commissioner-ivanova-hands-over-eu-mission-label-20-cities-2024-10-22\\_en](https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/commissioner-ivanova-hands-over-eu-mission-label-20-cities-2024-10-22_en)

<sup>111</sup> <https://netzerocities.eu/pilot-cities-programme/>

<sup>112</sup> According to the JRC definition. [https://research-and-innovation.ec.europa.eu/document/download/cb258381-77d5-435a-8b25-9a590795dc9e\\_en?filename=ec\\_rtd\\_eu-mission-climate-neutral-cities-infokit.pdf](https://research-and-innovation.ec.europa.eu/document/download/cb258381-77d5-435a-8b25-9a590795dc9e_en?filename=ec_rtd_eu-mission-climate-neutral-cities-infokit.pdf)

<sup>113</sup> <https://cordis.europa.eu/project/id/101112705>

<sup>114</sup> E.g. with the Funding and Financing Guide. <https://climate-adapt.eea.europa.eu/en/mission/funding/guide>

<sup>115</sup> E.g. *Stakeholder and Citizen Engagement in Climate Adaptation: A DIY Manual*

<sup>116</sup> E.g. *Regional Adaptation Support Tool*

<sup>117</sup> *Adaptation Stories and Mission Case Studies* showcase real-life examples of regional or local actions and good practices regarding the planning, funding, implementing and monitoring of climate adaptation solutions.

<sup>118</sup> <https://climate-adapt.eea.europa.eu/en/mission/solutions/mission-stories/natural-playgrounds-and-schoolyards-story17>

<sup>119</sup> <https://futurium.ec.europa.eu/en/eu-mission-adaptation-community>

<sup>120</sup> <https://cordis.europa.eu/project/id/101112737>

<sup>121</sup> <https://climate-adapt.eea.europa.eu/en/mission/solutions/mission-success-stories?activeAccordion=b88b1f74-8e1e-4dad-853b-eeac4ddbda7>; More examples and details are available in the *Mission Stories*



- the ECHoS project<sup>122</sup>, which involves 60 partners from all EU Member States and three associated countries, is creating a network of national cancer Mission hubs through stakeholder engagement and cross-policy dialogue.
- The Mission supports the revised Council Recommendation on cancer screening<sup>123</sup> by helping develop innovative, less invasive and more accessible methods and technologies for cancer screening. It also supported a pilot roadshow in Lithuania, Poland and Romania to raise awareness about cancer prevention and screening, which had 16 804 visitors<sup>124</sup>.
- A dialogue with young cancer survivors from all over Europe was organised, which resulted in a new research topic being added to the 2024 Cancer Mission work programme on ‘late-effects of treatment in adolescent and young adult (AYA) cancer patients and survivors’ (budget: EUR 36 million). A complimentary study on the provision of AYA care in Europe is being supported by the 2024 EU4Health programme<sup>125</sup>.
- Support for 20 international clinical trials which use participative research to optimise affordable personalised diagnostic and therapeutic interventions. The trials involve over 3000 patients with difficult-to-treat cancers and aim to integrate successful interventions into national healthcare systems by 2030.

Mission Cancer is currently setting up its monitoring system so it can effectively measure progress towards its goal of improving the lives of more than 3 million people by 2030 through prevention, cure and solutions to live longer and better. However, it faces the challenge of defining ‘improving lives’ in the context of a disease that may return after treatment.

*What messages emerged from the stakeholder consultation?*

When asked about the **effectiveness of EU Missions compared to regular collaborative research**, 30% of respondents said they were ‘somewhat’ or ‘to a great extent’ more effective (491 out of 1663 respondents).

However, only **20% of respondents are (very) satisfied with the EU Missions’ progress towards their objectives so far** (325). The most satisfied stakeholder groups are public authorities (24%; 21) and academia (21%; 174). At the other end of the spectrum, 12% are (very) dissatisfied (196), with the most dissatisfied stakeholder groups being NGOs (18%; 13), public authorities (16%; 14) and academia (14%; 115).

### *EU Missions’ governance*

The process for designing all five EU Missions was participatory, open and transparent, despite challenges with conducting consultations caused by the COVID-19 pandemic<sup>126</sup>. The regulation establishing Horizon Europe called for Missions to ‘be bold and inspirational’, with ‘wide, scientific, technological, societal, economic, environmental or policy relevance and impact’<sup>127</sup>. Their goals were further developed at the political level in diverse ways.<sup>128</sup>

The Missions’ implementation plans include *possible* impact-level indicators<sup>129</sup> but their monitoring and evaluation framework has not been finalized, despite the fact that the regulation establishing Horizon Europe stipulated that “The missions, their objectives, budget, targets,

<sup>122</sup> <https://cordis.europa.eu/project/id/101104587>

<sup>123</sup> <https://data.consilium.europa.eu/doc/document/ST-14770-2022-INIT/en/pdf>

<sup>124</sup> Details are available on the [Cancer Mission implementation page](#)

<sup>125</sup> For further information please consult [https://hadea.ec.europa.eu/news/eu4health-prior-information-notice-exploratory-study-provision-care-adolescent-and-young-adult-aya-2024-07-16\\_en](https://hadea.ec.europa.eu/news/eu4health-prior-information-notice-exploratory-study-provision-care-adolescent-and-young-adult-aya-2024-07-16_en)

<sup>126</sup> SWD(2023) 260 final on the assessment of EU Missions, p. 11 for Mission Climate Change Adaptation, p. 34 for Mission Cancer, pp. 59-60 for Mission Ocean and Waters, p. 87 for Mission Cities, pp. 108-109 for Mission Soil, <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52023SC0260>

<sup>127</sup> Regulation (EU) 2021/695, Art. 8. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R0695>

<sup>128</sup> Goals were further specified after they were laid out in the Horizon Europe regulation.

<sup>129</sup> Table 1 in the implementation of the Mission on Climate Change Adaptation, p. 36 in the Mission Cancer implementation plan, p. 51 of the Mission Ocean and Water implementation plan, illustrative examples on p. 43 in the Mission Cities implementation plan, proposed indicators on p. 69 of the Mission Soil implementation plan.

scope, indicators and milestones shall be identified in strategic R&I plans or the work programmes”<sup>130</sup>.

In the 2023 assessment of Missions, many stakeholders reported that their **governance process is ‘cumbersome, complex and lacking transparency’**<sup>131</sup>. While acknowledging the differences between the Missions’ governance, the Commission committed to make the EU Missions more effective for example by:

- intensifying discussion with political actors, notably Member States, on how to streamline their governance to make it more efficient, inclusive, and effective;
- mobilising a broader portfolio of instruments to secure greater participation of the private sector, including public-private partnerships and the public procurement of innovation;
- carrying out targeted actions to support local and national communication efforts to boost citizen engagement and raise awareness about EU Missions.

Since the 2023 assessment, the relevant Commission departments have strengthened the governance processes by reinforcing the horizontal steer and coordination of the EU Missions. More specifically, they engaged with Member States through the *mutual learning exercise (MLE)* of the Policy Support Facility. In addition, the Mission Boards’ terms of reference (ToR) were updated in 2024 to improve coordination mechanisms and ensure strategic alignment with EU-wide and local objectives.

Governance issues were also flagged in the evaluation of Focus Areas – a pilot initiative under the predecessor programme, Horizon 2020. The evaluation remarked that Focus Areas were added as an extra layer of cooperation, within a policy mix already suffering from ‘increasing complexity and fragmentation’<sup>132</sup>.

*What messages emerged from the stakeholder consultation?*

More than half of respondents to the consultation consider that the **creation of EU Missions** contributes **somewhat or to a great extent** to strengthening the impact of European R&I (52%; 813).

Public authorities feel the most favourably about the EU Missions, with 56% (49) agreeing with the statement that the creation of the EU Mission contributes somewhat or to a great extent to strengthening the impact of EU R&I, followed by EU citizens (52%; 105) and companies (50%; 138). Non-EU citizens were less favourable, with 42% (105) agreeing or strongly agreeing that the EU Missions help strengthen impact. Only business associations were less favourable (37%; 18).

Only 6% (95) of the respondents consider that the creation of the EU Missions does **not at all** contribute to strengthening the impact of European R&I.

### *Strengthening the uptake of R&I in society (Key Impact Pathway 6)*

A total of 1 636 projects (or 49% of the projects that provided such information by 6 January 2025) have EU citizens or end users involved. This is a new indicator in Horizon Europe: comparable figures for Horizon 2020 are only available for civil society engagement, reported in just 2.9% of projects as of 31 March 2017.

The inclusion of citizens and stakeholders and co-design aspects are emphasised in EU Mission projects (67% of their projects report this type of engagement, compared to 49% programme-wide). Some examples include:

<sup>130</sup> Regulation (EU) 2021/695, Art. 8. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32021R0695>

<sup>131</sup> COM(2023) 457 final, p. 9, <https://mission-soil-platform.ec.europa.eu/resource-library/communication-commission-eu-missions-two-years-assessment-progress-and-way-forward>

<sup>132</sup> SWD(2024) 29, p. 76. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52024SC0029>

- The first European Mission Soil Week in 2023 brought together over 300 in-person and 600 online participants, including key stakeholders, researchers, and policymakers, to discuss the importance of soil health. Launched in April 2023, the Mission Soil manifesto now has 3400 signatories, including more than 600 legal entities and a growing number of local and regional authorities.
- The EU Mission on adaptation to climate change organised 27 community-level events in the regions and local authorities involved in the Mission, and 21 regions / local authorities have received technical assistance to engage citizens and stakeholders.
- the EU Cancer Mission held a dialogue with over 100 young cancer survivors from across Europe, to better understand the challenges they face during and after cancer treatment. It has brought young cancer patients and survivors on board to co-create initiatives<sup>133</sup> that will help address their physical and mental well-being, follow-up care, continuity in education etc.

### *Horizon Europe clusters*

This section provides a few, illustrative examples of Pillar II projects per cluster, but is not exhaustive<sup>134</sup>. The work programmes did not provide indicators or targets to assess progress towards the expected outcomes and impacts. Given the early stage of programme implementation (only 6.6% of projects were closed on 6 January), the evaluation can only present examples of outputs.

Under the health cluster (Cluster 1), the CLIMOS project<sup>135</sup> involved collaboration on an indicator for climatic suitability conditions for leishmaniasis<sup>136</sup> (a parasitic tropical disease caused by sandflies, deadly in around 8% of the 700 000 to 1 million new cases each year). This cross-project effort resulted in a machine learning modelling approach that has been applied to predict the climatic suitability for this disease across several regions. Several countries can therefore prepare for the climate change-related arrival of a devastating disease.

Horizon Europe also funds **digital health solutions**, as demonstrated by XpanDH<sup>137</sup> - a project that aims to speed up the adoption of the European electronic health record exchange format (EEHRxF) across the EU by mobilising and building capacity in individuals and organisations, enabling citizens to easily access and share their health data with healthcare professionals. Another project, MELISSA<sup>138</sup>, which brings together experts in diabetes, AI, behavioural sciences, and clinical trials, among others, – is developing an AI-based digital diabetes management solution that provides personalised treatment and care recommendations. AI approaches are used to adjust daily insulin treatment in line with real-time glucose fluctuations.

Cluster 2 – **Culture, creativity and inclusive societies** supports research aimed at strengthening European democratic values, including rule of law and fundamental rights. For example, ITHACA<sup>139</sup> is developing and testing a human-centric AI and ethics-by-design online discussion platform for civic participation in local governance, integrating human and social interpretations

<sup>133</sup> [2024 EU Cancer Mission call, topic 05: Improving the understanding and management of late-effects in adolescents and young adults \(AYA\) with cancer \(RIA\) - European Commission \(europa.eu\)](#)

<sup>134</sup> The highlighted projects stem from the ‘feedback to policy’ mechanism and were identified in January-March 2024 through the network of coordinators and contact points. Feedback to policy bridges policy work and research stemming from Horizon Europe via collaborative channels and work between policy DGs and executive agencies.

<sup>135</sup> <https://climos-project.eu/>; <https://cordis.europa.eu/project/id/101057690>

<sup>136</sup> The indicator is expected to be part of the [Lancet Countdown Europe Report for 2024](#) (due in May 2025) and will be made available to public health professionals and decision-makers as part of the [European Climate and Health Observatory](#).

<sup>137</sup> <https://cordis.europa.eu/project/id/101095594>

<sup>138</sup> <https://cordis.europa.eu/project/id/101057730>

<sup>139</sup> <https://cordis.europa.eu/project/id/101094364>

into the design, to ensure that AI decision-making processes are explainable, transparent and fair and consider the needs of vulnerable groups.

Cluster 3 initiatives address security threats, disaster management, and crisis response. They enable the development of security solutions in real environments by involving security practitioners and citizens<sup>140</sup>. Horizon Europe contributes to **border security** through projects such as MELCHIOR<sup>141</sup> and ODYSSEUS<sup>142</sup> aimed at making border control checks more efficient and ethical thanks to advanced, non-intrusive technologies. MELCHIOR, which builds on the success of the Horizon 2020 project MESMERISE<sup>143</sup>, is further developing and demonstrating a novel technology based on infrasound waves for detecting drugs, explosives, weapons, and illicit goods concealed on individuals and in body cavities. ODYSSEUS uses a combination of portable unobtrusive screening technology, drone-assisted image processing, and AI-based data analytics to enable border authorities to remotely validate identities and check vehicles, luggage or cargo, while enhancing the travel experience for EU and non-EU citizens.

Horizon Europe also supports **disaster resilience** in Cluster 3 through initiatives such as DIREKTION<sup>144</sup>, which follows up on the Horizon 2020 project Fire-IN<sup>145</sup>. The project promotes an EU-wide network of fire and rescue practitioners, evaluating emerging technologies, and fostering collaboration between various stakeholders to address challenges related to climate change, ageing infrastructure, and geopolitical instability. Under Cluster 3, Horizon Europe also funds efforts to improve **cybersecurity**, e.g. the CS-AWARE-NEXT<sup>146</sup> project, which focuses on improving cybersecurity management for organisations and local supply networks by providing advanced AI-based threat intelligence integration, supporting compliance with European legislation, and enhancing internal and external cooperation.

Through its targeted investments, **Cluster 4** has not only contributed to immediate research advances but has also laid the **groundwork for an EU positioning in key technology areas** contributing to the digital and industrial transition, such as quantum computing, space and advanced materials. However, and even though the patent profiles of Cluster 4 researchers show the appropriate specialisation in all KETs, patent filing trends from EU-27 countries have remained stable since FP7, while the EU global patent shares in most KETs<sup>147</sup> have been declining<sup>148</sup>.

Through projects like IRISS<sup>149</sup>, the programme supports the development and implementation of **sustainable and safe materials**. With a specific focus on SMEs, IRISS aims to help industries utilise safe and sustainable-by-design materials (SSbDs) via a state-of-the-art ecosystem. Cluster 4 also funds the development of **advanced materials** such as high-performance composites (HPCs) whose applications are currently hindered by long processing times, high costs, and low recyclability. The r-LightBioCom project<sup>150</sup> proposes a paradigm shift in the way HPCs are manufactured and recycled, unlocking sustainable-by-design production of lightweight HPCs.

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<sup>140</sup> Resilient Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/797281>, p. 46

<sup>141</sup> <https://cordis.europa.eu/project/id/101073899>

<sup>142</sup> <https://cordis.europa.eu/project/id/101073910>

<sup>143</sup> <https://cordis.europa.eu/project/id/700399>

<sup>144</sup> <https://cordis.europa.eu/project/id/101121249>

<sup>145</sup> <https://cordis.europa.eu/project/id/740575>

<sup>146</sup> <https://cordis.europa.eu/project/id/101069543>

<sup>147</sup> Including advanced manufacturing, advanced materials, life-science technologies, micro/nano-electronics and photonics, artificial intelligence, security and connectivity, [https://research-and-innovation.ec.europa.eu/key-enabling-technologies\\_en](https://research-and-innovation.ec.europa.eu/key-enabling-technologies_en)

<sup>148</sup> Digital & industrial transition evaluation study – Conclusions, 2024, <https://data.europa.eu/doi/10.2777/845650>.

<sup>149</sup> <https://cordis.europa.eu/project/id/101058245>

<sup>150</sup> <https://cordis.europa.eu/project/id/101091691>



The project seeks to enable new circular value chains by reducing HPC waste generation and reliance on non-sustainable energy sources.

To respond to Europe's need for a new generation of batteries that are durable, safer and sustainably manufactured, the framework programme invests in projects such as TEMPEST<sup>151</sup>. Supported **under Cluster 5**, the project aims to develop high-performance, lightweight, and recyclable batteries for various transportation applications. Its approach involves advanced chemistry and AI with the aim of optimising battery systems with integrated health monitoring and thermal management.

In addition, the European Green Deal relies on continuous input from the scientific research community to ensure it is implemented effectively and based on the latest evidence. By providing better understanding on how the climate system works and how it will change over time, climate science is fundamental for making informed and wise decisions about reducing emissions and adapting to a changing climate<sup>152</sup>. For example, the Cluster 5 projects TipESM<sup>153</sup> and ClimTip<sup>154</sup> bring together scientists from a range of disciplines boost our understanding of climate tipping points on our planet - including their impact on ecosystems and society and to develop a set of early warning indicators and safe future emission pathways that minimise the risk of exceeding these dangerous thresholds and increase societal preparedness.

Cluster 6 supports the development of innovative circular solutions that will be crucial to halting environmental degradation and accelerating the transition to a competitive circular economy in Europe. For example, **the CISUTAC project**<sup>155</sup> is increasing circularity and sustainability in the textiles and clothing sector. It does so by demonstrating the feasibility and value of repair and disassembly, as well as sorting for reuse and recycling, and the creation of circular garments through 'fibre-to-fibre' recycling and design for circularity regarding two material groups of textiles fibre materials (polyester and cotton).

Innovation in aquaculture is also funded under Cluster 6. For example, the **Aquaponics from Wastewater REclamation (AWARE)** project<sup>156</sup> is investigating to grow fish in recycled water. The project hereby aims to farm fish for human consumption in any city, with no impact on natural habitats and no dependence on natural freshwater availability.

EU-funded research is a key contributor to the **Intergovernmental Science Policy Platform on Biodiversity and Ecosystem Services (IPBES)**<sup>157</sup>. For example, EU-funded projects have provided knowledge on pollinators that was taken up in the IPBES reports and in turn sparked policy action that addresses knowledge gaps on pollinators<sup>158</sup>. Pollinators such as bees and butterflies are a key group of animals that plays a crucial role in maintaining global food security and ecosystems health and that is essential for biodiversity and human well-being. A key Horizon Europe-funded projects in this area is RestPoll<sup>159</sup>, that proposes a holistic approach to pollinators habitat restoration through an innovative network of demonstration cases and living labs that engage not only experts but also others stakeholders to achieve solutions combining cutting-edge research, participatory planning and new business models.

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<sup>151</sup> <https://cordis.europa.eu/project/id/101103681>

<sup>152</sup> European Commission: DG for Research and Innovation, EU research & innovation – Top funder of leading climate science, Publications Office of the European Union, 2023. <https://data.europa.eu/doi/10.2777/40193>

<sup>153</sup> <https://cordis.europa.eu/project/id/101137673>

<sup>154</sup> <https://cordis.europa.eu/project/id/101137601>

<sup>155</sup> <https://cordis.europa.eu/project/id/101060375>

<sup>156</sup> <https://cordis.europa.eu/project/id/101084245>

<sup>157</sup> <https://op.europa.eu/en/publication-detail/-/publication/4cff1a99-42fd-11ee-a8b8-01aa75ed71a1/language-en>

<sup>158</sup> <https://op.europa.eu/en/publication-detail/-/publication/4846a018-cd83-11eb-ac72-01aa75ed71a1>

<sup>159</sup> <https://cordis.europa.eu/project/id/101082102>

### *Impacts of institutionalised European partnerships*

The legal base for joint undertakings sets out various possible impacts<sup>160</sup> and each JU contributes to one or more of these pathways:

- According to each of their evaluations, all JUs (see annexes) have helped to create and diffuse high-quality new knowledge and skills, through publications, patents, technological solutions, cooperation and knowledge transfer. They have also helped to harmonise regulations and standards across Member States and between other actors.
- All JUs also reported some contribution to the EU's global leadership and value chain resilience in key technologies. Some had more tangible effects than others. For example, the Chips JU (previously ECSEL/KDT) strengthened the European electronic components and systems (ECS) industry by driving innovation and advances in semiconductor manufacturing, and improving the resilience of its technology value chains, particularly in strategic sectors like mobility, health, and environmental technologies<sup>161</sup>. The Clean Hydrogen JU was instrumental in advancing electrolyser technology and scaling up capacity from 100 kW in 2011 to 10 MW by 2017 and 30 MW in 2023. This JU has ensured that Europe remains a leader in hydrogen fuel cell buses and refuelling infrastructure. Projects like JIVE and JIVE 2 made it possible for fuel cell electric buses to be running in 22 European cities<sup>162</sup>.
- Several JUs contributed to developing and accelerating the uptake of innovative solutions. For example, IMI2/IHI JU projects made a practical contribution to the fight against COVID-19, supported an approved vaccine for Ebola virus disease<sup>163</sup> and a new antibiotic for difficult-to-treat infections<sup>164</sup>, provided insights into the genetics of Alzheimer's disease, and identified biomarkers associated with diabetes development<sup>165</sup>. The world's second malaria vaccine (R21) was developed through clinical studies supported by the Global Health EDCTP JU, receiving the WHO recommendation for global use in 2023<sup>166</sup>.
- Moreover, the EMPIR (institutional) partnership<sup>167</sup> supported research that contributed to the revision process of for of the seven base units for the International System of Units in 2019, linking them to fundamental constants of the universe, addressing the related measuring challenges<sup>168</sup>.

Data on the EIT KICs is presented below in the section on that specific topic.

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<sup>160</sup> Objectives in Art. 4 of the Council Regulation (EU) 2021/2085. Art. 171 stipulate that the evaluation 'shall examine how each JU fulfils its mission and objectives, cover all activities of the JU and evaluate the JU's European added value, effectiveness, efficiency, including its openness and transparency, relevance of the activities pursued and their coherence and complementarity with relevant regional, national and Union policies, including synergies with other parts of Horizon Europe, such as missions, clusters or thematic or specific programmes. The evaluations shall take into account the views of stakeholders, at both European and national level and shall, where relevant, also include an assessment of the long-term scientific, societal, economic and technological impacts of the JUs'.

<sup>161</sup> Annex on the evaluation of ECSEL / KDT / Chips JU.

<sup>162</sup> Annex on the evaluation of Clean Hydrogen / FCH JU.

<sup>163</sup> EBOVAC, <https://cordis.europa.eu/project/id/115854>

<sup>164</sup> <https://ec.europa.eu/newsroom/sante/newsletter-archives/52538>

<sup>165</sup> Annex on the evaluation of IMI2 / IHI, pp.1-2.

<sup>166</sup> Annex on the evaluation of Global Health EDCTP.

<sup>167</sup> Decision (EU) 2021/2084

<sup>168</sup> Annex on the evaluation of EMPIR / EPM, p. 2.

### *Visibility, transparency and phasing-out of European Partnerships*

Horizon Europe introduced new criteria for evaluating partnerships<sup>169</sup>. This section focuses on their (a) international positioning and visibility as global ambassadors for European research and innovation, (b) openness to new participants and transparency of stakeholder involvement, and (c) phasing out preparedness. In addition, an analysis of the partnerships' directionality is presented under the chapter on relevance below, while the partnerships' additionality is assessed under EU added value.

**On international positioning and visibility**, the European Partnerships' approaches have varied depending on their strategic objectives. According to the Biennial Monitoring Report survey, 23 Partnerships have allocated a budget to establish collaborations with partners outside the EU. However, their approaches vary significantly:

- European-centred partnerships, which focus primarily on European initiatives (e.g. EIT Urban Mobility, Circular Bio-based Europe, Single European Sky Partnership, Driving Urban Transition, InnoEnergy, European Partnership for an Industrial Battery Value Chain, People-centric sustainable built environment - Built4People), either have no international exposure or involve limited efforts to connect with stakeholders outside the EU. Any connection with non-EU stakeholders has mostly been made during international conferences.
- Global-oriented partnerships, which require the involvement of international partners to achieve their objectives (e.g. Global Health EDCTP3, Biodiversa +, Innovative Health Initiative, Water4All), focus on international collaboration aligned with the SDGs and EU policy priorities, such as the AU-EU Innovation Agenda, and are active in the relevant global fora.

Despite their efforts, partnerships' external evaluations identified the following obstacles: lack of sufficient financial resources to engage effectively with international partners<sup>170</sup>, concerns about the competitiveness of European industry<sup>171</sup>, geopolitical issues and demands for technological sovereignty<sup>172</sup>, and the absence of a well-defined strategy for international collaboration<sup>173</sup>.

#### ***SESAR 2020 and SESAR 3 acting as ambassadors for European air traffic management practices globally***

SESAR 3 engages in bilateral cooperation with international partners such as the US Federal Aviation Administration under the EU-US Memorandum of Cooperation, focusing on the modernization and global interoperability of air traffic management (ATM). SESAR 3 has also established cooperation with Singapore, Qatar and the UAE, highlighting strategic aviation partnerships. By cooperating with Japan and supporting the EU Aviation Safety Agency (EASA), SESAR 3 plays a major role in advancing global ATM modernisation and aligning with International Civil Aviation Organisation (ICAO) standards.

Europe's success in the aviation and ATM industry is bolstered by its contribution to global standards through ICAO, aligning the European ATM Master Plan with ICAO's Global Air Navigation Plan (GANP).

<sup>169</sup> Art. 171 (point 4) of the [Council Regulation \(EU\) 2021/2085](#) establishing the joint undertakings under Horizon Europe, as well as Art. 50 and point 4 in Annex III to the Regulation 2021/695 establishing Horizon Europe.

<sup>170</sup> Co-programmed partnership external evaluation report Processes4Planet CP (P4P), Section 4.4.

<sup>171</sup> Co-programmed partnership external evaluation report Made in Europe (MiE), Section 4.4.

<sup>172</sup> Smart network and services (SNS) external evaluation report, Section 4.8, 2024. <https://data.europa.eu/doi/10.2777/7895247>.

<sup>173</sup> ECSEL & Key Digital Technologies JU external evaluation report, Section 4.8, 2024. <https://data.europa.eu/doi/10.2777/71518>.

On **transparency and openness**, according to the data collected by the BMR survey<sup>174</sup>, the number of new organisations involved in the partnerships increased slightly between 2022 and 2024. Most of the 308 new organisations are associated with the EIT KICs<sup>175</sup>, while the other institutionalised partnerships have attracted fewer newcomers<sup>176</sup>. In addition, the partnerships extended to 55 countries in 2022 to 54 in 2024, demonstrating their significant reach beyond European borders. Several new countries have joined, including Australia, Brazil, Egypt and Georgia. Participation from widening countries has increased from 840 to 1 070 members, with some countries experiencing a significant rise of around 30% in the number of participating institutions<sup>177</sup>.

However, challenges with attracting participants persist, especially due to the co-funding requirements<sup>178</sup> and membership fees<sup>179</sup>. In particular, some partnerships such as the Circular Bio-based Europe, Made in Europe and BATT4EU struggle to attract organisations from Central and Eastern Europe<sup>180</sup>. The share of SME members increased more than that of universities and private organisations between 2022 and 2024, primarily because of their participation in the EIT KICs. Only three JUs reported SME as members (SNS, Clean Aviation, Single European Sky)<sup>181</sup>.

On **phasing-out preparedness**, all EIT KICs have in place a phasing-out strategy to become financially sustainable after 15 years of operation. Only three other institutionalised partnerships have adopted a phasing-out plan which was required by the end of 2023<sup>182</sup> (Single European Sky ATM Research 3, Global Health EDCTP3 and Europe's Rail). EIT InnoEnergy<sup>183</sup>, EIT Digital<sup>184</sup>, and EIT Climate-KIC<sup>185</sup> reached the end of their partnership status in December 2024, and continue their activities without structural EIT funding. The EIT has signed a Memorandum of Cooperation offering these three KICs targeted, project-based funding through calls for proposals for education and training activities, that are more difficult to self-finance. In 2023-2024, the EIT grants represent 25% of the EIT InnoEnergy budget, 25% of the EIT Climate budget and 27% of the EIT Digital budget. Data for 2025 is not yet available.

*What messages emerged from the stakeholder consultation?*

49% of the 435 respondents either “agreed” or “strongly agreed” that the exercise to rationalise European Partnerships led to them producing more solutions for the benefit of society, the environment and the economy – this point of view was held most by business associations (39%; 15), companies (34%; 89) and academia (30%; 243). On the other hand, 9% of respondents (146) either “disagreed” or “strongly disagreed” with this statement, with the highest levels of disagreement among NGOs (17%; 12), EU citizens and respondents from academia (10%; 21 and 80 respectively).

<sup>174</sup> European Commission, Biennial monitoring report (BMR) on partnerships in Horizon Europe, 2024, p. 34. <https://data.europa.eu/doi/10.2777/991766>.

<sup>175</sup> Ibid, p.34.

<sup>176</sup> Digital & Industrial Transition evaluation study, 2024, Annex I, p. 45. <https://data.europa.eu/doi/10.2777/489648>

<sup>177</sup> European Commission, BMR, 2024, p. 35. <https://data.europa.eu/doi/10.2777/991766>.

<sup>178</sup> For example, in PARC, the lower funding rate requires more national co-financing. European Commission, Evaluation support study on Horizon Europe's contribution to a Resilient Europe – Final Report Phase 2, Publication Office of the European Commission, 2024, Annexes-case study 15, section on EU added value.

<sup>179</sup> In EIT Digital, the membership fee increased by 30% between 2022 and 2024. Institutionalised partnership evaluation report EIT Digital. <https://data.europa.eu/doi/10.2777/431739>

<sup>180</sup> Evaluations of the Circular Bio-Based Europe JU, Section 5.9. <https://data.europa.eu/doi/10.2777/636121>, co-programmed partnership Made in Europe, Section 4.5, and the partnership for Batteries (BATT4EU), Section 4.8.

<sup>181</sup> European Commission, Biennial monitoring report (BMR), 2024, p. 34. <https://data.europa.eu/doi/10.2777/991766>

<sup>182</sup> Article 17, Council Regulation 2021-2085 (Single Basic Act). Co-funded Partnerships, whose financing depends on a grant agreement of limited duration, are not required to produce a phasing-out strategy.

<sup>183</sup> Evaluation of the EIT InnoEnergy Partnership, Section 6.10, 2024. <https://data.europa.eu/doi/10.2777/5626827>.

<sup>184</sup> Digital & Industrial Transition study. Annex I, 2024, Section 3.10. <https://data.europa.eu/doi/10.2777/489648>

<sup>185</sup> Evaluation of the EIT Climate-KIC, Section 3.10, 2024. <https://data.europa.eu/doi/10.2777/1601692>



Overall, the responses on European Partnerships (co-programmed, co-funded and institutionalised) show that a majority of respondents (53%; 825) are either “very satisfied” or “satisfied” with this type of support.

When probed about the level of satisfaction for the various types of support, excluding respondents who selected “I do not know / I have not used it”, of all types of support, **co-funding**<sup>186</sup> yielded the most responses of “dissatisfied” or “very dissatisfied” (22%; 204). Dissatisfaction rates were higher among public authorities (32%), NGOs (29%) and academic and research organisations (24%) than among companies and business organisations (9%) or business associations (12%).

Notably, when breaking down stakeholder responses by Cluster<sup>187</sup>, we see that 73% of Cluster 4 respondents (417), 72% of Cluster 5 respondents (454) and 68% of Cluster 3 respondents (220) deem European Partnerships effective compared to regular collaborative research projects in achieving Horizon Europe’s objectives.

In view of the change from Horizon 2020 to Horizon Europe, 53% of all stakeholders (825) maintained that the **new approach to partnerships** (co-programmed, co-funded and institutionalised) contributed to strengthening the impact of European research and innovation. Most supportive of the new approach to partnerships are business associations (74%; 29), non-EU citizens (60%; 21) and companies (58%; 154)<sup>188</sup>.

### *Social sciences and humanities (SSH)*

Under Horizon Europe, SSH<sup>189</sup> activities are implemented by: (1) mobilising multidisciplinary SSH expertise in Cluster 2, focusing on democracy, governance, cultural heritage and socio-economic transitions; and (2) making SSH a cross-cutting priority in order to boost the Programme’s economic and societal impacts – a commitment now set in its legal base, building on the systematic integration first initiated under Horizon 2020<sup>190</sup>. In 2025, the first SSH integration monitoring report for Horizon Europe will provide an analysis of the funding attributed in 2021-2024 to SSH-flagged topics and the level of SSH integration achieved through the programme so far. As of August 2024, SSH-flagged topics account for 27.3% (665 out of 2 432 topics), while SSH projects account for 9.5% (1 363 out of 14 423 total funded projects).

Although progress has been made on the integration of SSH and funding of related research, position papers submitted to the Horizon Europe public consultation by stakeholders flagged concerns such as insufficient early engagement of SSH researchers in the preparation of the work programme and call across all clusters, difficulties in identifying funding opportunities due to overly prescriptive work programmes, and the use of the TRL scale in certain topics.

In the same consultation, certain respondents expressed that, although social science specialists are involved in the consortia, SSH methodologies are not always integrated into the project overall. Moreover, over 40% (889) of the respondents believed that SSH disciplines should be further developed for the 2025-2027 strategic plan<sup>191</sup>.

Respondents were asked for their views on potential untapped complementarities between the different Horizon Europe Clusters. They flagged untapped complementarities between Cluster 2

<sup>186</sup> Without specifically inquiring for co-programmed, co-funded and institutionalised.

<sup>187</sup> Included options: ‘to a great extent’ and ‘somewhat’, excluding ‘I don’t know/no opinion’.

<sup>188</sup> Included options: ‘to a great extent’ and ‘somewhat’.

<sup>189</sup> Social sciences and humanities encompass various disciplines such as social sciences, education, business, law, and humanities and the arts, notably including economics, sociology, demography, anthropology, psychology, geography, human rights, journalism, library and museum science, religion and theology, foreign languages and cultures, history, philosophy, fine arts, performing arts, graphic and audio-visual arts, and design. Please see glossary for comprehensive list of SSH disciplines as per the Horizon Europe programme guide.

<sup>190</sup> European Commission, G 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>, p. 58.

<sup>191</sup> Directorate-General for Research and Innovation. (2023). Synopsis report: Looking into the R&I future priorities 2025-2027, p. 37, <https://data.europa.eu/doi/10.2777/93927>.



projects and Cluster 3 in particular (44%, 320), followed by Clusters 4 and 1 (39%, 284 and 281 respectively)<sup>192</sup>.

Specific findings were observed for Clusters under Pillar II. For example, interviewed Cluster 2 project coordinators acknowledged that the integration of the SSH aspect throughout Pillar II Clusters has facilitated greater interdisciplinary collaboration, enabling SSH participants to engage more extensively in scientific domains beyond SSH, and positioning SSH as a critical driver of project impacts across all Clusters<sup>193</sup>. Cluster 4 interviewees however reported that the effective incorporation of SSH into its funded projects could be better targeted at specific actions, while the cluster placed increasing importance on the integration of skills and the human dimension in the various topics<sup>194</sup>.

In Clusters 5 and 6, the broader consideration of societal needs and processes received limited attention, although destinations focusing on climate science, food and communities dedicate over half of their funding to projects with contributions from SSH<sup>195</sup>.

### *Promotion of gender equality*

Between 2021 and 2023, Horizon Europe allocated **EUR 215.3 million to actions focused on improving gender equality (i.e. where it was a principal objective)**. Another EUR 4 841.4 million was allocated to actions with gender equality as an important and deliberate objective but not as the main reason for intervention. In total, **EUR 5 056.7 million can be directly linked with gender equality-advancing efforts**, corresponding to 11% of Horizon Europe commitments<sup>196</sup>. Examples of such contributions include funding for gender-related research under Horizon Europe Pillar I (e.g. Marie-Sklódowska-Curie Actions and the ERC), under Pillar II (e.g. gender biases in AI, radicalisation and violence against women, women's health, backlash against women in politics, women in rail), and under Pillar III (the [Women Leadership Programme](#) (EIC), the [EU Prize for Women Innovators](#) (EIC/EIT), the [Supernovas](#) (EIT), [Girls Go Circular](#) (EIT) and WIDERA (e.g. implementation of inclusive gender equality plans).

The figures above are ex-ante budgetary estimates: project-level estimates on gender equality relevance of funded activities are not yet available to this evaluation. It is likely that the share of Horizon Europe activities with *some* relevance for gender equality is higher than 11%: as of January 2025, only 19.5% of all research topics under the Horizon Europe main work programme<sup>197</sup> explicitly indicated that gender equality is not at all relevant.<sup>198</sup>

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<sup>192</sup> Ibid p. 45

<sup>193</sup> Resilient Europe Case Study 7: Research on democracy in practice, in annexes to the evaluation study. <https://data.europa.eu/doi/10.2777/22355>, p. 366.

<sup>194</sup> Green Transition evaluation report, 2024; in Section 3.1.1.3. <https://data.europa.eu/doi/10.2777/67934> Digital and Industrial Transition study, 2024; Section 6.2.3. <https://data.europa.eu/doi/10.2777/845650>

<sup>195</sup> Green Transition evaluation report, 2024; in Section 3.1.1.3. <https://data.europa.eu/doi/10.2777/67934>

<sup>196</sup> The total contribution that can be directly linked with gender equality-advancing efforts was divided by the total programme funding committed at the end of 2023 (EUR 44 039.9 million), as reported in the Horizon Europe Performance Statement, retrieved on 01/12/24 from [Horizon Europe - Performance - European Commission \(europa.eu\)](#). The **estimated total contribution** - including indirect contributions - **is expected to be higher**, amounting to EUR 36 067.8 million. Funding allocation from score 0 and score 0\* integrated in total.

<sup>197</sup> This definition encompasses R&I actions, Innovation actions, and Cofund actions. It does not include non-research Coordination and support actions, procurement, prizes, Framework Programme agreements, as well as any actions for which this flagging system does not exist (e.g. joint undertakings and all bottom-up actions)

<sup>198</sup> Figure from CORDA as of 2 December 2024. In Horizon 2020 specific topics were flagged as “relevant for gender mainstreaming” whereas Horizon Europe rolled out the requirement of integrating the gender dimension as a default for all RIAs, IAs and COFUND, unless it is expressly specified otherwise. See factsheet on gender equality provision under Horizon Europe <https://op.europa.eu/en/publication-detail/-/publication/51704c8d-ca5f-11eb-84ce-01aa75ed71a1>.

As a benchmark, an estimated 23% of Horizon 2020 projects took the gender dimension into account<sup>199</sup>.

Table 1: Gender balance in Horizon Europe<sup>200</sup>

| Indicators  | Horizon 2020 | Horizon Europe | Horizon Europe target |
|---|--------------|----------------|-----------------------|
| Percentage of women expert evaluators   | 42%          | 45%            | 50%                   |
| Percentage of women participating in Horizon 2020 / Horizon Europe advisory groups and expert groups* | 43%          | 51%            | 50%                   |
| Percentage of women coordinators in FP projects   | 24%          | 31%            | n/a                   |
| Percentage of women researchers in FP projects  | 37%          | 38%            | n/a                   |

Source: Commission monitoring data (cut-off date: 6 January 2025). For Horizon 2020 advisory groups: Horizon 2020 ex-post evaluation, section ‘Promotion of gender equality in Horizon 2020’ (p. 45)

The percentage of women in Commission expert evaluation panels and in Horizon Europe advisory and expert groups has increased compared to Horizon 2020. Women now sign 45% of expert evaluation contracts, against 42% at the end of Horizon 2020. Moreover, as of 2025, women make up 51% of Horizon Europe advisory and expert groups (against a 50% target): a considerable increase since Horizon 2020 (43%) and FP7 (33%). The share of women-led consortia has also substantially increased, from 24% under Horizon 2020 to 31% under Horizon Europe. Although the percentage varies significantly from one programme part to another<sup>201</sup>, the positive trend is also observed in the programme parts where women’s participation is lower<sup>202</sup>.

Conversely, the share of women participating in projects as researchers is similar to that of Horizon 2020 (38% of all researchers), with a notable exception of the MSCA where the share of women among recruited researchers (fellows) is 45.1%<sup>203</sup>. **This is higher than the average share of women researchers in the EU in 2021 - 33.7%**<sup>204</sup>. While this under-representation occurs at all career stages, the imbalance is more pronounced in later stages: women represent only 26% of senior researchers/associate professors and full professors/directors of research participating in the programme<sup>205</sup>. This figure is lower than the EU average (e.g. 29.7% for grade A researchers).

In private sector-oriented parts of the programme, the participation rate of women is lower:

- The share of women-led companies and of companies with women CEOs accounted for 19% and 17% of EIC Accelerator companies respectively<sup>206</sup>.
- 24% of start-ups created through EIT innovation projects in 2021-2022 are led by women<sup>207</sup>.

<sup>199</sup> SWD on the ex post evaluation of Horizon 2020, SWD(2024) 29 final, p. 46

<sup>200</sup> These and other monitoring figures on gender equality in Horizon Europe have been first released in the following report: Commission: Directorate-General for Research and Innovation, Neehus, S. and Volpe, R., *Fostering gender equality – Key figures from Horizon Europe – R&I monitoring flash*, Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/2941871>

<sup>201</sup> The share of women coordinators in Horizon Europe projects ranges from 81% in European innovation ecosystems and 55% for reforming and enhancing the European R&I system, to as low as 21% for Cluster 3 – “Civil Security for Society”.

<sup>202</sup> For example, the percentage of women-led consortia in digital, industry and space topics (current Cluster 4 ‘Digital, Industry and Space’) increased about 5 percentage points between 2014 and 2022, Digital and Industrial Transition, Final Report, p. 81.

<sup>203</sup> 2 890 out of 6 403, as of 1 July 2024. Data provided by DG EAC.

<sup>204</sup> She Figures 2024 – Gender in R&I, p. 138, <https://data.europa.eu/doi/10.2777/592260>

<sup>205</sup> While women represent 48.1% of first stage researchers (Category D), women are significantly less represented among top grade researchers (26%). Commission administrative & monitoring data, cut-off date: 31 May 2024.

<sup>206</sup> Women in Innovation Actions data extraction, March 2024. Women-led companies figure encompasses successful CEOs, CTOs and CSOs.

<sup>207</sup> Innovative Europe evaluation study, 2024, p. 78. <https://data.europa.eu/doi/10.2777/499132>

- **The share of women participants in the partnerships' activities is below 30%**<sup>208</sup>. This is well below the proportion of women employed in science and technology in the EU in 2022 (52%), the overall proportion of women among scientists and engineers (41%)<sup>209</sup>, as well as the share of women researchers in Horizon Europe (38%).

These results are consistent with the broader start-up and scale-up landscape. In the EU, women reportedly represent only 2% of the founders of 'unicorn' companies<sup>210</sup>, and there is an estimated USD 1.7 trillion financing gap for women-owned SMEs<sup>211</sup>. The share of investment attracted by women-led start-ups also remains comparably low, with only 8.7% of investments going to women-led companies<sup>212</sup>. The discrepancy is particularly pronounced for venture capital funding, as in 2023, all-men founded companies secured 75% of capital raised whereas all-women founded companies secured a mere 7% (the remaining 18% was secured by mixed companies)<sup>213</sup>. A significant funding imbalance persists for all-women teams, who receive 2 to 6 times less investment than all-men teams, despite securing a similar number of deals<sup>214</sup>. Closing this considerable gender gap is crucial for the EU if it is to harness the full potential of women entrepreneurs, which would increase economic output and innovation<sup>215</sup>.

In 2022, **gender equality plans (GEPs)** became an eligibility criterion for public bodies, research organisations and higher education establishments. The objective was to increase awareness about and action on gender equality and inclusiveness<sup>216</sup>. Data updated in January 2025 shows that 81% of Horizon Europe applications in these categories declared to have a gender equality plan at proposal stage<sup>217</sup> – a considerable improvement given that most research performing organisations in EU countries did not yet have a GEP in 2021<sup>218</sup>.

At the end of 2023, the European Commission conducted a pilot compliance check on a randomly selected set of beneficiaries and affiliated entities of projects funded under Horizon Europe calls with deadlines in 2022. The findings of the pilot check revealed deficiencies in GEPs in 59% of the checked entities, resulting in the launching of grant termination procedures for three entities<sup>219</sup>. The effectiveness of gender equality plans (GEPs) could be further supported by

<sup>208</sup> The only partnership where women account for more than 30% of participants is the Circular Bio-based Europe JU (39% of participants). See figure in BATT4EU partnership external evaluation report, p. 36, Digital and Industrial Transition evaluation support study - Annex 1: Cross-partnership Analysis, p. 49, and figures in the EIT Gender Equality Plan 2023 Implementation Report. [https://eit.europa.eu/sites/default/files/2024-02/EIT%20GEP%202023%20Implementation%20Report\\_ADOPTED.pdf](https://eit.europa.eu/sites/default/files/2024-02/EIT%20GEP%202023%20Implementation%20Report_ADOPTED.pdf).

<sup>209</sup> Eurostat. <https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20230602-1>.

<sup>210</sup> The JRC Technical Report 'In search of EU unicorns - What do we know about them?' examines the gender of founders and finds a pronounced gender equality gap in the creation of innovative start-ups. Notably among the founding teams of unicorn companies in the EU, there are 3 founders per company (N=94) 2% of which are women based on an analysis of Crunchbase data. Innovative Europe, Final Report, p. 78.

<sup>211</sup> Financial Alliance for Women (2022), retrieved 5/12/24 at: <https://financialallianceforwomen.org/the-opportunity/#growthpotential>, data based on World Bank findings. Innovative Europe, Final Report p.78.

<sup>212</sup> Financial Alliance for Women (2022). <https://financialallianceforwomen.org/the-opportunity/#growthpotential>. Retrieved 5 December 2023, data based on World Bank findings.

<sup>213</sup> Atomico (2023), The State of European Tech 2023.

<sup>214</sup> Atomico (2022), The State of European Tech 2022.

<sup>215</sup> European Commission, Science, Research and Innovation Performance of the EU, 2024, p. 344.

<sup>216</sup> See factsheet on gender equality provision under Horizon Europe, retrieved 05/07/24 at <https://op.europa.eu/en/publication-detail/-/publication/51704c8d-ca5f-11eb-84ce-01aa75ed71a1>.

<sup>217</sup> Commission monitoring systems (CORDA), data at 13 January 2025.

<sup>218</sup> Information available in the Gender Equality in Academia and Research (GEAR) tool and reported in a report from the ERAC Standing Working Group on Gender in Research and Innovation (ERAC SWG GRI). Available at: <https://data.consilium.europa.eu/doc/document/ST-1202-2021-INIT/en/pdf> Excellent Science, Annex 2.12, p. 550.

<sup>219</sup> Results reported by Commission services on 13 December 2024.

facilitating development of compliant plans, and by strengthening enforcement by means of *ex ante* verification and regular *ex post* compliance checks<sup>220</sup>.

*What messages emerged from the stakeholder consultation?*

Overall, 36% (575) of respondents agreed and 15% (229) strongly agreed that strengthened gender equality provisions have the potential to promote gender equality across R&I organisations and activities. Citizens were the most positive across the various stakeholder groups, closely followed by public authorities (61%; 51)<sup>221</sup>.

The least positive stakeholder group, i.e. those that (strongly) disagreed that these provisions have the potential to promote gender equality across R&I organisations and activities – were companies (15%; 40), academia (14%; 111) and EU citizens (13%; 25).

*International cooperation, including association of third countries*

Stakeholders consulted in interviews and during workshops stressed that the Horizon Europe internationalisation strategy should follow a ‘win-win’ principle, ensuring reciprocity and a level playing field with international partners (e.g., exploitation rules, IPR, etc.) and strengthening ties with ‘like-minded’ countries<sup>222</sup>. In the first two 2-year work programmes, 21% of collaborative research topics encouraged international cooperation.

Horizon Europe extended the association policy to like-minded third countries – countries with a strong R&I basis, located in the EU neighbourhood and beyond. It offered them the possibility of a partial association<sup>223</sup> and reciprocal access to national R&I programmes of associated countries seen as equivalent to Horizon Europe. Under Horizon 2020, reciprocity clauses were introduced only in the association agreements with Switzerland and the Faroe Islands (similar provisions existed in the FP7 Association Agreement with Israel). In line with the regulation establishing Horizon Europe, such reciprocity clauses have been introduced in all new association agreements.<sup>224</sup> As of October 2024, through the reciprocity clause, the association of third countries has provided access to EU-based entities in 64 national programmes of the 19 associated countries<sup>225</sup>.

The association of third countries also implies a substantial financial input. The combined annual financial contribution of the associated countries is close to EUR 3 billion, resulting in a substantial increase in the funding for R&I activities under Horizon Europe (Horizon Europe budget and the financial contribution of associated countries constituting external assigned revenue of the Union budget).

For high-income countries, association has increased access to excellence and globally-ranked research performing organisations and infrastructures. In the targeted evaluation survey, 73% of responding beneficiaries agreed to a (very) large extent that Horizon Europe has achieved or is likely to achieve increased international visibility through collaboration with leading global partners (3 208 respondents).

Partners from associated countries supplement scientific areas in which Member States may be lacking: the *ex post* evaluation of Horizon 2020 found that peer-reviewed publications, involving

<sup>220</sup> European Commission: Directorate-General for Research and Innovation, Pépin, A., Andriescu, M., Buckingham, S., Mounou, A. et al., *Impact of gender equality plans across the European Research Area – Policy briefs*, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/655676>

<sup>221</sup> Either “agreed” or “strongly agreed” with the statement.

<sup>222</sup> Viscido, S., Lotito, A. and Boekholt, P., *Horizon Europe and the digital & industrial transition – Interim evaluation support study*, Publications Office of the EU, 2024, p. 113. <https://data.europa.eu/doi/10.2777/845650>.

<sup>223</sup> In all cases so far, in relation to Pillar II, which addresses global societal challenges such as climate change.

<sup>224</sup> In line with Article 16 (4) Horizon Europe Regulation.

<sup>225</sup> As examples, EU-based entities now have access to programmes in Associated Countries such as the Israeli National Quantum Initiative, the Turkish Industrial R&D Supports Programme and the calls from Canada’s Natural Sciences and Engineering Research Council (Alliance grants, Alliance International grants, Alliance International Quantum grants; Collaborative Research and Training Experience (CREATE) Quantum Call).



a contributor from at least one associated or other non-EU country, have a higher scientific impact<sup>226</sup>.

Association also contributes to broader geopolitical goals: the reform of national R&I systems in the enlargement countries and support to R&I capacity building<sup>227</sup>, their alignment with the ERA and the EU objectives in the area of ‘Science and Research’ (EU acquis, Chapter 25)<sup>228</sup>. All nine states recognized as candidates for EU membership are associated to Horizon Europe: Albania, Bosnia and Herzegovina, Georgia, Moldova, Montenegro, North Macedonia, Serbia, Türkiye and Ukraine. Kosovo, which formally submitted its application for EU membership in 2022 and is considered a potential candidate, also became associated to Horizon Europe for the first time in 2021. These countries are collaborating in projects such as Montevitis<sup>229</sup>, which has developed infrastructure for the systematic collection of data on the viticulture sector, enabling an analysis of climate change effects<sup>230</sup>. In addition, as the majority of the associated countries belong to the widening group, Horizon Europe is helping to narrow the gap in R&I excellence across the continent<sup>231</sup>.

The list of associated countries has changed between Horizon 2020 and Horizon Europe. The United Kingdom, considered a Member State throughout Horizon 2020, became a third country and then became associated since 1 January 2024<sup>232</sup>. Switzerland was associated in Horizon 2020 and negotiations were concluded in December 2024 for its association to Horizon Europe. Both countries have historically had high participation in Framework Programmes. According to Commission analysis, participation of UK entities in particular has considerably declined compared to Horizon 2020<sup>233</sup>.

The change in status of the UK and Switzerland affects participation statistics. Across the programme, the EU contribution to associated countries shows a relative decrease, from 8.6% to 7.5% compared to Horizon 2020. At the same time, associated countries have a high share of newcomer participants among all country groups (54%, although lower than the 63% in Horizon 2020)<sup>234</sup>. Non-associated third countries also have high newcomer participation: 55% of all participants and 26% of all funding.

As a group, non-associated third countries have had a small surge in shares of distinct applicants (up from 7% to 10.1%), total applications (from 4% to 5.6%) and requested EU contribution (from 1% to 2.3%) compared to Horizon 2020. Among collaborative projects, Horizon Europe pillar I stands out for its international dimension, with 10.7% of participants coming from non-associated third countries, followed by Pillar II (5.4%), Pillar III (2.9%) and WIDERA (2.8%).

More specifically, the share of participation of associated and third countries in collaborative projects has increased compared to Horizon 2020. 62% of Horizon Europe Pillar II projects include at least a participant from an Associated Country, compared to 44% under Horizon 2020. The change in status of the UK is an important driver, but the involvement of associated countries in collaborative projects is higher than in Horizon 2020 even without the UK, see Table 2). An

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<sup>226</sup> Cited more than MS-only publications and three times more than the world average, SWD(2024) 29 final, p. 47.

<sup>227</sup> International cooperation case study, Excellent Science, pp. 15, 44. <https://data.europa.eu/doi/10.2777/9552959>

<sup>228</sup> Ibid, pp. 15-16, 44.

<sup>229</sup> <https://cordis.europa.eu/project/id/101059461>

<sup>230</sup> <https://montevitis.eu/introducing-the-montevitis-phenology-app-revolutionizing-viticulture-data-collection/>

<sup>231</sup> Case study on international cooperation, Excellent Science study, pp. 16, 44, 46.

<sup>232</sup> In this and all other state of play figures, the UK is treated as an Associated Country for all grants and proposals since the start of the Programme (2021), even though it only became an Associated Country on 1 January 2024. The same applies to the other countries that became Associated Countries during the implementation of Horizon Europe (Canada, New Zealand).

<sup>233</sup> European Commission, Country participation in the EU R&I framework programmes (2021-2023), p. 12 and 17.

<sup>234</sup> Ibid, Figure 16.



analysis<sup>235</sup> of the Commission shows that even before it became associated, UK entities were participating in three out of ten Horizon Europe collaborative projects.

Table 2: Collaborations, participations, and funding by type of country (international cooperation)

| Indicators on international participation in collaborative projects | Associated countries |              | Other third countries |              |
|---|----------------------|--------------|-----------------------|--------------|
|   | Horizon Europe       | Horizon 2020 | Horizon Europe        | Horizon 2020 |
| Share of participation in collaborative projects                    | 10%                  | 7%           | 6%                    | 5%           |
| <i>Pillar II only<br/>(II-III for Horizon 2020)</i>                 | 10%                  | 7%           | 5%                    | 4%           |
| Share of EU contribution in collaborative projects                  | 6%                   | 7%           | 1%                    | 1%           |
| <i>Pillar II only<br/>(II-III for Horizon 2020)</i>                 | 6%                   | 7%           | 2%                    | 1%           |
| Share of collaborative projects involving country group             | 48%                  | 37%          | 33%                   | 22%          |
| <i>Pillar II only<br/>(II-III for Horizon 2020)</i>                 | 62%                  | 44%          | 37%                   | 15%          |

Sources: CORDA as of 6 December 2024

International cooperation is not limited to participation of associated and non-associated teams in projects, it also takes with the form of programme-level cooperation, partnerships that are international by design, such as EDCTP3 or through global consortia involving funding agencies from third countries pooling their resources and defining a common strategic research agenda (such as the International Rare Diseases Research Consortium or Water4All on water security).

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| <i>What messages emerged from the stakeholder consultation?</i>  |
| When asked about for the benefits of Horizon Europe, a large majority of respondents (74%; 1 184) agreed that <b>participating in Horizon Europe “improved cooperation with partners from other countries - within the EU and beyond”</b> . Results were similar for all country groups. Public authorities (88%), NGOs (77%) and academia (74%) were the most likely to select this option. Non-EU citizens were also likely to select this option (67%), as were EU citizens (65%).  |
| 70% of respondents (1 367) highlighted the need to improve international cooperation. Most position papers that addressed this issue highlighted the relevance of international R&I activities to the programme. Some also provided the following suggestions for improvement: 1) association of the UK and Switzerland; 2) addressing practical issues that arise as a result of the variation in statuses of third countries (e.g. countries with transitional arrangements, countries in negotiations), including budgetary and administrative consequences when the country’s status changes; 3) complexities in building synergies with international initiatives (e.g. the Belmont Forum) under Horizon Europe compared with Horizon 2020; and 4) the late communication of the work programmes as an obstacle to the better integration of non-EU partners <sup>236</sup> . |

Horizon Europe’s openness to international cooperation is balanced with safeguarding EU interests in strategic areas. Its Regulation sets out new provisions<sup>237</sup> **for actions related to EU strategic assets, interests, autonomy and security**. The table below provides an overview of **Article 22(5)** application - the topics open to specified third countries primarily relate to quantum research, artificial intelligence, and critical raw materials.

Table 3: Overview of the application of Article 22(5) in the main Horizon Europe work programmes (WP) 2021-2022 and 2023-2024 and instruments

| Overview  | WP 2021-2022                            | WP 2023-2024<br>(main WP) | WP 2023-2024<br>(after amendment)       |
|---|---|---------------------------|---|
| Total HE budget per WP  | € 27,433,798,406                        | 27,416,624,390 €          | 27,416,624,390 €                        |
| Total budget per main WP  | € 15,978,811,926                        | 13,519,989,622 €          | 14,887,909,796 €                        |
| Topics applying Art. 22(5)<br>(*topics open to specified third countries) | <b>49 topics</b><br><b>(*19 topics)</b> | <b>31 topics</b>          | <b>33 topics</b><br><b>(*14 topics)</b> |

<sup>235</sup> European Commission, Country participation in the EU R&I framework programmes (2021-2023), p. 19

<sup>236</sup> Ibid, figure 14.

<sup>237</sup> Articles 22.5 and 22.6 of Regulation (EU) 2021/695 set the foundation for the protection of information.

|   |               |               |               |
|---|---------------|---------------|---------------|
| Total Budget subject to Art.22(5)                         | € 786,120,000 | 475,500,000 € | 540,000,000 € |
| Share of main WP budget subject to Art.22(5)              | 4.92%         | 3.52%         | 3.63%         |
| Share of total Horizon Europe budget subject to Art.22(5) | 2.87%         | 1.73%         | 1.97%         |

Source: DG RTD, reflecting the amendment of 17 April 2024 to the 2023-2024 work programme.

In addition, the EuroHPC JU has made use of Article 22(5) in six calls in its first three work programmes. The EIC work programme for 2024 also provides for specific economic security measures such as specific eligibility criteria and investment safeguards.

Cooperation with entities based in China has been excluded from all innovation actions in the Horizon Europe 2023-2024 work programme<sup>238</sup>, due to concerns linked to unwanted IP transfer and the stalling of negotiations on the joint roadmap for the future of EU-China cooperation in science, technology, and innovation. Covering 243 actions, this provision does not apply to EU-based entities controlled by China.

In the amendment to that work programme, entities assessed as being “high risk suppliers”<sup>239</sup> of mobile network communication equipment are excluded from taking part in 35 actions.

**Security scrutiny**<sup>240</sup> addresses potential misuse of project results of sensitive or classified nature (e.g. results that could be channelled into crime or terrorism). In 2023, the security appraisal involved screening 118 proposals (68 in 2022), of which 20 underwent the security scrutiny procedure in cooperation with national security experts<sup>241</sup>. Examples of security-sensitive topics include explosives and CBRN, infrastructure and utilities, border security, intelligent surveillance, terrorism & organised crime, digital security, and space.

Applying these safeguards can be cumbersome for Member States, associated countries and the Commission departments (e.g. the assessment of control necessary for applying Art. 22.5 requires a complex process involving many entities at Member State and EU level). Nevertheless, the safeguards incorporated into Horizon Europe feed into the European economic security strategy, which identified four categories of risk<sup>242</sup>, and its implementation<sup>243</sup>.

#### *What messages emerged from the stakeholder consultation?*

The majority of respondents (56%; 650) stated that their project was **not “impacted by the exceptional limitations on participation in Horizon Europe by non-EU legal entities”** or was impacted a little, while 13% (151) indicated that their project was impacted to a great extent. Academic and research institutions seem to have been affected more than any other stakeholder group (around half of responses submitted indicated that their project was affected “to a great extent”).

<sup>238</sup> Under Art. 22.6 which allows, where appropriate and duly justified, to insert additional eligibility criteria in the work programme, taking account specific policy requirements or the nature and objectives of a given action.

<sup>239</sup> Set out in the second report on Member States’ progress in implementing the EU toolbox on 5G cybersecurity of 2023 and the related Communication on the implementation of the 5G cybersecurity toolbox of 2023.

<sup>240</sup> Art. 20 of Regulation (EU) 2021/695 sets the foundations for the protection of information in the programme.

<sup>241</sup> European Commission, DG for Research and Innovation, Annual report on research and technological development activities of the EU and monitoring of Horizon Europe and Horizon 2020 in 2023, published in 2024, COM(2024)231 final, p. 2. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52024DC0231>

<sup>242</sup> The strategy identified broad, non-exhaustive categories of risk to economic security, related to: 1) resilience of supply chains; 2) physical and cyber security of critical infrastructure; 3) technology security and leakage; and 4) weaponisation of economic dependencies or economic coercion. They can occur along the value chain, from basic research to commercialisation and manufacturing. JOIN(2023)20final, <https://op.europa.eu/s/zW9M>.

<sup>243</sup> The Commission’s economic security package includes a white paper on enhancing R&D support involving technologies with dual-use potential and a proposal for a Council Recommendation on research security.

#### 4.1.3. Effectiveness: **Towards economic impacts** – To what extent has Horizon Europe fostered innovation-based growth, created jobs and leveraged investments in R&I (Key Impact Pathways 7-9)?

This section assesses Horizon Europe’s contribution to the three key impact pathways focusing on the desired economic impacts: ‘Generating innovation-based growth’; ‘Creating more and better jobs’; and ‘Leveraging investments in R&I’.

Figure 12: Economic impacts of Horizon Europe – Key Impact Pathways 7-9



Source: Annex V to Regulation 2021/695.

##### *Generating innovation-based growth (Key Impact Pathway 7)*

As of 6 January 2025, Horizon Europe beneficiaries reported 124 *validated* outputs concerning intellectual property rights (IPR). These include patent applications, trademarks, and utility designs<sup>244</sup>. By comparison, at the same stage of Horizon 2020, only five valid IPR applications had been reported. So far under Horizon Europe, 3 703 innovative products, processes or methods have been produced and reported by the projects. The process for research IPR application and ultimately award of IPR is lengthy: for FP7, IPR applications almost tripled within 7 years of its *ex post* evaluation<sup>245</sup>.

Pillar II projects have reported 24 IPR applications, but 1 900 innovative outputs (particularly new methods and product innovations). Most IPR applications recorded up until now are under Pillar III, particularly the EIC Accelerator (76).

Since 2011, the European Research Council (ERC) ‘proof of concept’ grants have been helping researchers bring their ideas from the laboratory and academia to the realm of business, marking a crucial phase in the innovation lifecycle. In other words, they help the beneficiaries to bridge the gap between the results of their pioneering research and the early phases of its commercialisation. Notable projects funded in the 2023 include<sup>246</sup>:

- Istituto Italiano di Tecnologia’s project STORE-LIGHT, which focuses on advancing solar energy storage by combining solar energy conversion and storage into one system.
- In the field of medical technology, the FitSleep project is set to revolutionise the treatment of obstructive sleep apnoea, a condition causing disruption in breathing during sleep,

<sup>244</sup> While it is expected that the number of IPR applications reported by projects at this stage is low and unrepresentative, there is evidence that the number available in Commission monitoring systems is an underestimate of the current IPR activity of participants. IPR applications reported under cascading actions, such as the EIT and co-funded partnerships, are only very partially reflected in the system at the reference date (see Section 4.2.5). This may be particularly impactful for the EIT KICs, which have reported over 300 IPR applications in the 2021-2023: however, the data was not yet validated in central monitoring systems at the reference date.

Moreover, the continuous reporting tools of the programme allow beneficiaries to encode aggregate data about the *confidential* IPR applications they submitted. The tool suggest that participants have submitted already at least 700 IPR applications, of which more than 600 for patents only; the vast majority (over 400) are for EIC projects. However, the data structure of this reporting does not allow to verify the validity of these applications, and in particular to check whether these have been lodged before the start of the projects concerned – as observed in the Horizon 2020 final evaluation, these “background” IPR outputs are commonly reported by beneficiaries in continuous reporting tools.

<sup>245</sup> SWD(2024) 29 final, p. 62.

<sup>246</sup> [https://erc.europa.eu/sites/default/files/2024-01/erc-2023-poc-3-dl3-results\\_list.pdf](https://erc.europa.eu/sites/default/files/2024-01/erc-2023-poc-3-dl3-results_list.pdf)

affecting over a billion people worldwide. This pioneering device uses non-invasive electrical stimulation to activate tongue muscles, preventing airway collapse during sleep.

More detail on this bridging mechanism between Pillars I and III is provided in chapter 4.3.1.

As noted in chapter 3, Horizon Europe has provided support to around 16 220 companies through grants, out of which 2 571 in pillar III (excluding the EIC Fund). This includes large companies: more specifically, in the period of 2018-2024, the EIC and EIC pilot supported over 70 companies that achieved ‘centaur’ status (valuation above of EUR 100 million) – of these, six are valued at over EUR 500 million<sup>247</sup>. In the Horizon Europe period alone, the programme supported 30 centaurs<sup>248</sup>.

In 2021-2023, according to EIT data, the EIT KICs reported to have launched 956 innovations on the market<sup>249</sup>, created 436 start-ups and provided support to 5 806 start-ups and scale-ups.<sup>250</sup>

### *Creating more and better jobs (Key Impact Pathway 8)*

With the support of Horizon Europe, 39 543 full time equivalent (FTE) jobs were created or maintained by organisations participating in the programme, based on data declared by 21% of funded projects before 6 January 2025. By comparison, at the same stage of Horizon 2020, projects were maintaining 17 365 FTE employees.

The NEMESIS macroeconomic model estimates an increase in the number of persons employed in the research sector of up to 60 000 jobs by 2023-2024, which is similar to the estimations performed for the impact assessment of Horizon Europe<sup>251 252</sup>. In the long-term, the total Horizon Europe is estimated to create a total of 1 490 jobs in 2021, 20 400 jobs in 2023, and to reach a maximum of 63 000 jobs in 2033-2034<sup>253</sup>. The 63 000 jobs created in 2033-2034 include 2 000 in research and 61 000 in production activities. They also include 41 000 low qualified jobs and 20 000 high qualified jobs<sup>254</sup>. The current calculations are based on data up to June 2023 encompassing EUR 22.8 billion in EU contribution to projects, and are consistent with the *ex ante* estimation presented in the impact assessment up to that date<sup>255</sup>.

Moreover, according to RHOMOLO macroeconomic model analysis (see Annex 2, data as of 2 July 2024), Horizon Europe has led to an increase in employment, its impact peaking at +0.06% in 2023, amounting to about 128 000 persons (the total number of persons employed in the EU and UK in the base year of the model is almost 232 million).

### *Leveraging investments in R&I (Key Impact Pathway 9)*

Programme participants have already mobilised EUR 10.2 billion in co-investment to implement the projects, in complement to the initial investment of the programme. This is a considerable

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<sup>247</sup> EISMEA, Scaling Deep Tech in Europe – the European Innovation Council Impact Report 2025, p. 9, [https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f\\_en?filename=EIC-Impact-Report-2025.pdf](https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f_en?filename=EIC-Impact-Report-2025.pdf).

<sup>248</sup> DG RTD monitoring.

<sup>249</sup> Figures of innovations reported by the EIT KICs are not yet fully reflected in the Commission’s central monitoring system.

<sup>250</sup> Annexes 21-27; Chapter 1 on Effectiveness, summary of tables on EIT KICs data on KPIs.

<sup>251</sup> SWD(2018) 307 final, Part 2/3, p. 36. Estimating a gain of up to 100 000 jobs in R&I activities in the investment phase (2021-2027).

<sup>252</sup> The discrepancy between the macroeconomic model and the KIP8 indicator can be attributed to 1) the lag in project reporting, 2) the fact that the latter includes jobs maintained by participants, not only created, and 3) by macroeconomic models estimating economy-wide employment in research sectors, not restricted to projects funded by the programme.

<sup>253</sup> Innovative Europe study, 2024, p. 60. <https://data.europa.eu/doi/10.2777/499132>.

<sup>254</sup> Based on the ‘medium’ case.

<sup>255</sup> Estimating a gain of 200 000 jobs over 2027-2036, 40% high skilled. See SWD(2018) 307 final, Part 2/3, p. 36.



increase compared to the same stage in Horizon 2020, when just over EUR 5 billion in co-investment had been provided by project participants.

Leverage factors of different Horizon Europe programme parts (the ratio between co-investment from participants and financial contribution from the EU) vary widely. Under Pillar II only, they range between 0.01 in civil society and academia-oriented Cluster 2 to around 0.35 in more industry-oriented Cluster 4 and Cluster 5. The co-investment rate is primarily a function of the funding rate of each action, which is defined *ex ante* by the Commission; moreover, in general, costs for private for-profit entities are covered to a lesser extent than those of universities or non-profit organisations. Annex 7 presents a more detailed analysis.

In the short-term, one of the added value aspects of the European partnerships and EU Missions was the aim to leverage external funds towards Research and Innovation. Their progress is discussed below in section 4.4.1 on EU added value.

### *Programme-wide macroeconomic effects on GDP*

For estimating long-term economic effects, this evaluation uses three macro-economic models<sup>256</sup>, providing a GDP multiplier in the range of 4 and 11, by 2045:

NEMESIS macroeconomic modelling<sup>257</sup> estimates that expected GDP gains for the EU-27 induced by Horizon Europe increase progressively, from EUR 0.2 billion in 2021, to EUR 3.3 billion in 2023 and EUR 14 billion by 2032-2034, making up 0.0012%, 0.023%, and 0.085% of GDP, respectively (see table 4 below). This is on track compared to estimates in the impact assessment<sup>258</sup>, considering that the current estimation accounts for only a fraction of the overall budget of the programme (EUR 22.8 billion in signed grants by 10 June 2023). The GDP effect is thus limited to the budget allocated so far. The GDP multiplier shows that each Euro invested through Horizon Europe is expected to return up to EUR 11 in GDP gains by 2045, the same 25-year period reported on in the impact assessment.

The estimations of the RHOMOLO macroeconomic model, which build upon Horizon Europe funding data allocated by 2 July 2024, show that GDP impact increases steadily over the implementation period, peaking at +0.10% in 2024. It then gradually declines as the simulated monetary injection ends, the increased private and public capital stocks depreciate and the temporary increase in total factor productivity (TFP) fades. The GDP multiplier exceeds 6.5 by 2045. A comparison of these results with those of the ex-ante impact assessment carried out with an earlier version of the RHOMOLO model suggests that the impact of the policy is in line with, and even exceeds, the expected impact<sup>259</sup>.

The FIDELIO macroeconomic model is also based on Horizon Europe projects data from July 2024, and shows similar results to RHOMOLO in terms of GDP impact over years. EU GDP increases swiftly during the implementation period, with a peak of +0.10% in 2023, then declines slowly as the financial injection (modelled over 2021-2024) ends. The GDP multiplier keeps rising after the end of the programme due to the supply-side effects of the policy, and reaches 4.4 in 2045, 25 years after the start of the financial injection. In 2023, within the EU, most (69%) of the impact is directed towards the private sector (BERD), followed by higher education

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<sup>256</sup> See Annex 2 for detailed methodology and results.

<sup>257</sup> NEMESIS model results are reported for the Horizon Europe (2021-2023)-only scenario.

<sup>258</sup> SWD(2018) 307 final, Part 1/3, p. 40.

<sup>259</sup> The continuation scenario in the ex-ante impact assessment estimated the cumulative impact on GDP up to 2030 to be +0.63% compared to a no-policy scenario. The cumulative impact of the funds analysed is expected to be +0.73% by 2030, with a volume of investment around half of that simulated in the ex-ante analysis. This is due to the different assumptions on the funds' geographical distribution, their composition and alternative hypotheses on crowding in of private investment and additional returns from European funds.



institutions (HERD), while the impact on the public sector (GOVERD) is relatively small<sup>260</sup>. The BERD impact is particularly directed towards the manufacturing sector, with the top benefiting industries being machinery and equipment, computer and electronic products, motor vehicles and fabricated metal products.

Table 4: Results of macro-economic modelling for Horizon Europe funding (Nemesis, RHOMOLO, FIDELIO)

| Model   | 2021  | 2023  | 2025  | 2027  | 2030  | 2034  | 2040  | 2045  |
|---|-------|-------|-------|-------|-------|-------|-------|-------|
| <b>Nemesis</b>  |       |       |       |       |       |       |       |       |
| GDP gain (in bn EUR 2020/y w.r.t. reference scenario) | 0.2   | 3.3   | 4.8   | 6.6   | 12.2  | 13.8  | 9.3   | 6.6   |
| GDP gain (% w.r.t. reference scenario)                | 0.00% | 0.02% | 0.03% | 0.04% | 0.08% | 0.08% | 0.05% | 0.03% |
| <b>RHOMOLO</b>  |       |       |       |       |       |       |       |       |
| GDP gain (in bn EUR 2020/y w.r.t. baseline scenario)  | 0.3   | 11.1  | 13.3  | 11.6  | 9.9   | 8.1   | 6.1   | 4.8   |
| GDP gain (% w.r.t. baseline scenario)                 | 0.00% | 0.08% | 0.1%  | 0.09% | 0.07% | 0.06% | 0.05% | 0.04% |
| <b>FIDELIO</b>  |       |       |       |       |       |       |       |       |
| GDP gain (in bn EUR 2020/y w.r.t. baseline scenario)  | 0.2   | 10.6  | 9.8   | 7.0   | 6.6   | 5.6   | 3.5   | 2.5   |
| GDP gain (% w.r.t. baseline scenario)                 | 0.00% | 0.08% | 0.07% | 0.05% | 0.04% | 0.03% | 0.02% | 0.01% |

### *Pillar II economic effects*

**Most reported innovations come from Pillar II**, which has produced 1 900. The majority of IPR applications come from Pillar III, with 91 recorded, while Pillar II has generated 24 IPR outputs and Pillar I has produced 6.

In Pillar II, Cluster 4 (Digital, Industry, and Space) leads with 763 innovations, followed by Cluster 6 (Food, bioeconomy, natural Resources, agriculture, and environment) with 411 and Cluster 5 (Climate, energy, and mobility) with 405. Cluster 1 (Health) contributed 153 innovations, while Cluster 2 (Culture, creativity, and inclusive society) and Cluster 3 (Civil security for society) have the fewest outputs, with 96 and 73 innovations respectively.

Among the main types of actions, joint undertakings from Pillar II have the highest direct leverage factor (0.8). In the average JU project, 55% of total eligible costs are covered by the EU, and the remaining 45% by project participants. For more information on this, see the analysis below under the EU added value.

### *European Innovation Council (EIC)*

The Horizon Europe budget for Pillar III doubles the support that was available for equivalent programmes under Horizon 2020<sup>261</sup>, with much of this increase (including a top-up from NextGenerationEU) supporting the full implementation of the EIC. Under Horizon 2020, there

<sup>260</sup> The distribution of impact between institutional sectors is related to the modelling of R&I spending in FIDELIO. It is assumed that 30% of the funding is dedicated to basic research, specifically in the NACE M72 category from the BERD sector, 30% to the HERD sector, 3% to the GOVERD sector, and the remaining 37% is allocated to applied research, covering the remaining BERD sector categories.

<sup>261</sup> Under Horizon 2020, the EIC Pilot had a budget of EUR 3 billion, and the collective budget of Innovation in SMEs was over EUR 1.5 billion. In contrast, the Horizon Europe budget for the EIC and EIE is EUR 10.6 billion (up to EUR 527 million for the EIE). The EIT budget increased by EUR 0.6 billion (EUR 3 billion in HE).

was a gap during the EIC Pilot stage for technology readiness level (TRL) 3-6 support, as the EIC Launchpad Pilot offered only relatively small grants for bridging what is known as the ‘valley of death’ for organisations looking to commercialise the outputs of their research. The Transition instrument filled this gap and allowed the EIC to cover the entire TRL scale. Only the EIC (Accelerator) offers direct equity investment into companies with options for grant, blended finance (grant and equity) or equity-only support - this is where EIC is unique in the framework programme and wider EU programme landscape. As of 6 January 2025, the EIC Pathfinder supported 363 projects, while the EIC Transition supported 137 projects. The EIC Accelerator selected for funding over 700 start-ups and SMEs across 30 countries.<sup>262</sup> An analysis conducted one year prior found<sup>263</sup> that 50% of EIC Accelerator beneficiary companies were incorporated for less than 5 years at the date of grant signature. For the EIC Fund, from 2020 up until February 2025, 272 companies pertain to the portfolio, among which 17 have been declared bankrupt.

While predominantly open, more targeted Challenge calls are an integral part of the Pathfinder and Accelerator schemes. The Challenges are developed based on policy priorities and the insights of EIC programme managers. Their purpose is to identify opportunities in new and emerging technology fields and to build project portfolios, with the ultimate goal of strengthening Europe’s position in these fields. As of September 2024, there have been 22 Pathfinder Challenges and 14 Accelerator Challenges, along with 8 Transition Challenges which were discontinued after the 2023 work programme.

### *European innovation ecosystems (EIE)*

The European innovation ecosystems (EIE) is a new component of the programme in Pillar III that aims to support the scaling up of companies and to spur innovation to address important challenges in a responsible way, as set out in the New European Innovation Agenda (NEIA)<sup>264</sup>.

Since its launch, the EIE part of the Horizon Europe work programme has covered 782 unique participants, including 67 research organisations, 287 SMEs and 105 public bodies distributed across all the Member States<sup>265</sup>. As of June 2023, 53% of the researchers involved in EIE funded projects were women<sup>266</sup>.

In addition, as of November 2024, the Innovative SMEs Partnership funded under the EIE has supported 1 420 SMEs (of which 1335 are receiving public funding and 85 are self-funding their activities, 328 from widening countries). However, between 12% and 19% of applications to the last three calls for proposals were not funded due to the lack of national funding.

The EIE work programme also addresses the innovation divide through the creation of Regional Innovation Valleys (RIVs). In June 2024, the Commission identified 149 regions<sup>267</sup> as RIVs in order to strengthen regional innovation ecosystems, bridge the innovation gap in Europe and improve Europe's overall innovation performance. While 51% of the selected regions are innovation leaders and strong innovators, 49% are moderate and emergent innovators.

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<sup>262</sup> EISMEA, Scaling Deep Tech in Europe – the European Innovation Council Impact Report 2025, [https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f\\_en?filename=EIC-Impact-Report-2025.pdf](https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f_en?filename=EIC-Impact-Report-2025.pdf)

<sup>263</sup> European Commission, DG Research and Innovation, SME participation in Horizon Europe, data from 1 January 2024, <https://data.europa.eu/doi/10.2777/576670>.

<sup>264</sup> The New European Innovation Agenda. [https://research-and-innovation.ec.europa.eu/strategy/support-policy-making/shaping-eu-research-and-innovation-policy/new-european-innovation-agenda\\_en](https://research-and-innovation.ec.europa.eu/strategy/support-policy-making/shaping-eu-research-and-innovation-policy/new-european-innovation-agenda_en).

<sup>265</sup> Data extracted from CORDA on 26 September 2024. This data excludes the SMEs funded via FSTP under the InnovSMEs partnership.

<sup>266</sup> Innovative Europe Study, p. 103. <https://data.europa.eu/doi/10.2777/499132>

<sup>267</sup> List as of July 2024 available at: [https://research-and-innovation.ec.europa.eu/document/download/12476e45-0413-4487-bdd6-668d7457f1cc\\_en](https://research-and-innovation.ec.europa.eu/document/download/12476e45-0413-4487-bdd6-668d7457f1cc_en)

In line with the remit of the EIE part of the Horizon Europe work programme's legal basis, the Commission has organised an EIC Forum of public authorities and bodies in charge of innovation policies and programmes covering all Member States, to promote coordination and dialogue on the development of the EU's innovation ecosystem. In the EIC Forum, more than 200 initiatives to support the NEIA at national level with legislative actions, policy initiatives or funding schemes have been announced<sup>268</sup>.

### *European Institute of Innovation and Technology (EIT)*

The EIT, with its KICs and regional innovation hubs, is present 'on the ground' in all Member States including modest and moderate innovation countries and regions, as well as some associated countries<sup>269</sup>. This allows it to operate in local languages, which is crucial for education and training, and for providing business support and advice. Thanks to these capacities, the EIT plays a role in preventing brain drain in those regions and promotes innovation through a geographically balanced approach<sup>270</sup>.

The EIT and its EIT KICs are in charge of the management of several EU Skills Academies in strategic sectors for EU competitiveness, in particular those covered by the Net-Zero Industry Act, i.e. batteries, raw materials, solar, wind and hydrogen<sup>271</sup>. The objective of these Skills Academies is to accelerate training as well as up- and re-skilling in order to equip people with highly competitive skills that are in demand across Europe. Selected EIT KICs have been mandated by the Commission to lead those academies:

- The European Battery Alliance Academy (created by EIT InnoEnergy) is helping to ensure that Europe has enough skilled workers in the battery industry. The EBA Academy achieved its main target of 100 000 learners completing training by the end of 2024, ahead of the 2025 goal. According to the battery industry's estimates, 800 000 workers will need to learn new or additional skills by 2025 to bridge the skills gap<sup>272</sup>.
- The EIT InnoEnergy has also been appointed as the Secretariat of the European Solar Photovoltaic Industry Alliance (ESIA), whose aims include creating 400 000 new direct and indirect jobs and 30 GW of annual solar PV manufacturing capacity<sup>273,274</sup>.
- Venture Centre of Excellence – EIT Health, in partnership with the European Investment Fund, operates this public-private co-investment programme to empower finance for European health SMEs.
- EIT KICs also work together as EIT Community on activities such as the Deep Tech Talent Initiative (DTTI), one of the flagship initiatives of the new European Innovation Agenda. The target to train 1 million talents in deep tech fields by 2025 has been almost reached<sup>275</sup>. Also, the EIT Higher Education Initiative supports projects that aim to make universities more innovative and entrepreneurial.

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<sup>268</sup> European Commission, DG for Research and Innovation, Report on the state of play of the new European innovation agenda, Publications Office of the EU, 2024, p.3. <https://data.europa.eu/doi/10.2777/097305>.

<sup>269</sup> Bulgaria, Cyprus, Czech Republic, Estonia, Spain, Greece, Croatia, Hungary, Italy, Lithuania, Latvia, Montenegro, Malta, Poland, Portugal, Romania, Serbia, Slovenia, Slovakia, Türkiye, and Ukraine.

<sup>270</sup> See Innovative Europe Case Study 12 and Case Study 13 in Annex 4, <https://data.europa.eu/doi/10.2777/354>.

<sup>271</sup> [Annex 2 to the Commission Implementing Decision C\(2024\)8194 on the financing of the Programme and the adoption of the work programme for 2025-2027](#).

<sup>272</sup> European Commission (2022) Questions and Answers: The European Battery Alliance. [https://ec.europa.eu/commission/presscorner/detail/en/qanda\\_22\\_1257](https://ec.europa.eu/commission/presscorner/detail/en/qanda_22_1257) Accessed 4 July 2023.

<sup>273</sup> European Commission (2023) Commissioner Breton hosts ministerial meeting on European Solar PV Industry Alliance. [https://energy.ec.europa.eu/news/commissioner-breton-hosts-ministerial-meeting-european-solar-pv-industry-alliance-2023-12-01\\_en](https://energy.ec.europa.eu/news/commissioner-breton-hosts-ministerial-meeting-european-solar-pv-industry-alliance-2023-12-01_en).

<sup>274</sup> EIT InnoEnergy (n.d.) European Solar PV Industry Alliance. <https://www.innoenergy.com/about/about-eit-innoenergy/industrial-value-chains/solaralliance/>.

<sup>275</sup> <https://www.eitdeeptechtalent.eu/>

This unique support for skills building and learning does not exist in other Innovative Europe programme parts<sup>276</sup>. Since the beginning of Horizon Europe, the EIT Community has delivered the following results:

Table 5: Progress on EIT key monitoring indicators

| Indicator   | Time period: 2021-2023<br>(results reported by EIT KICs and validated by EIT) |                             | Values from<br>Horizon 2020's ex<br>post evaluation<br>(SWD Table 12) |
|---|---|-----------------------------|---|
|   | Target  | End of 2023                 |   |
| Number of people who graduated from the EIT-labelled master's and doctoral programmes | 3 378   | 2 757                       | Not reported  |
| Number of start-ups created by students from EIT programmes                           | 143   | 90                          | 36 in 2017-2020   |
| Number of start-ups as a result of EIT innovation projects                            | 289   | 346                         | 99 in 2017-2020   |
| Number of start-ups that received support from EIT KICs                               | 3 093   | 5 806                       | 3 862   |
| Number of innovative products or services put on the market by the EIT KICs           | 872   | 956                         | 1 501   |
| Participants in (non-degree) education and training                                   | 192 669   | 287 163                     | Not reported  |
| Other indicators, on training and skills development <sup>277</sup> :                 | Target:   | As of March 2025:           |   |
| Deep Tech Talent initiative   | 100 pledging partners   | 378 pledging partners       | Not reported  |
|   | 1 million people trained by end of 2025                                       | over 900 000 trained talent | Not reported  |
| The European Battery Alliance Academy   | 100 000 learners by 2025  | 112 000 learners            | Not reported  |

Source: EIT administrative data based on the KICs' monitoring. Targets based on the KIC's Strategic Agendas and approved by EIT.

#### 4.1.4. Towards the objective to widen participation and strengthen the European Research Area

Widening participation and strengthening the ERA is part of the Horizon Europe's general objective and is supported by WIDERA - a dedicated programme part. It has two components: widening participation and spreading excellence (widening) and reforming and enhancing the European R&I System (ERA). The ERA component is aligned with the Pact for Research and Innovation<sup>278</sup> and the ERA Policy Agenda<sup>279</sup>, and aims to strengthen capacities of R&I actors in areas such as open access and gender equality (see dedicated sections above).

The widening Member States have a higher share of participations in collaborative projects under Horizon Europe than previously under Horizon 2020 (accompanied by a higher EU contribution). There is also a significant rise in the share of collaborative projects involving widening Member States – from 47% under Horizon 2020 to 58% under Horizon Europe.

Table 6: Collaborations, participations and funding by type of country (widening)

|  | Widening MS | Non-widening MS |
|--|-------------|-----------------|
|--|-------------|-----------------|

<sup>276</sup> Innovative Europe study, 2024, chapter on internal coherence. <https://data.europa.eu/doi/10.2777/499132>.

<sup>277</sup> If one individual has been trained through two different courses (i.e. in two different deep tech fields), he/she is counted twice.

<sup>278</sup> [https://european-research-area.ec.europa.eu/sites/default/files/2023-11/2021-11-26\\_council%20recommendations\\_pact%20for%20r%26i%20in%20europe.pdf](https://european-research-area.ec.europa.eu/sites/default/files/2023-11/2021-11-26_council%20recommendations_pact%20for%20r%26i%20in%20europe.pdf)

<sup>279</sup> [https://commission.europa.eu/system/files/2021-11/ec\\_rtd\\_era-policy-agenda-2021.pdf](https://commission.europa.eu/system/files/2021-11/ec_rtd_era-policy-agenda-2021.pdf)

|   | Horizon Europe | Horizon 2020 | Horizon Europe | Horizon 2020 |
|---|----------------|--------------|----------------|--------------|
| Share of participations in collaborative projects       | 18%            | 15%          | 65%            | 73%          |
| Share of EU contribution in collaborative projects      | 15%            | 11%          | 77%            | 82%          |
| Share of collaborative projects involving country group | 58%            | 47%          | 97%            | 96%          |

Source: CORDA as of 6 January 2025

Several widening actions continue from the previous framework programme: Teaming, Twinning, ERA chairs, and the grant provided to the European Cooperation in Science & Technology programme (COST)<sup>280</sup>. While funded under the WIDERA budget, some stakeholders noted that COST actions are not aimed at supporting a given group of countries, and therefore not ideally positioned under the widening objective<sup>281</sup>.

One new initiative includes the Hop-on Facility, which allows research institutions from widening countries to join ongoing RIA under Horizon Europe Pillar II and EIC Pathfinder. As of January 2025, 140 research institutions from widening countries were selected for the Hop-on facility, joining collaborative projects with only non-Widening country participants. Approximately two-thirds joined Pillar II projects, the remaining ones being selected for the EIC Pathfinder. Stakeholders expressed appreciation for the concept, but lamented the strict eligibility criteria and difficulty in finding consortia that would include them in running projects, due to lack of contacts and possibly low awareness in non-widening countries<sup>282</sup>.

*What messages emerged from the stakeholder consultation?*

67% of respondents (1 035) (strongly) agreed that Horizon Europe is **on track to strengthen the impact and attractiveness of the European Research Area**. This view is more widespread among respondents who are not EU citizens (85%; 28), than among those whose are (68%; 85). 70% of respondents from academia (557) and NGOs (44) also support the statement. 5% of respondents from academia (strongly) disagreed.

Widening actions are among the few collaborative research actions still funded by the programme that can be focused on low-TRL discovery research<sup>283</sup>, often in the field of natural sciences, machine learning and artificial intelligence<sup>284</sup>.

The European Court of Auditors has highlighted the difficulties faced by entities in widening countries in recruiting international staff due, for example, to the low attractiveness of a research career (and salary) in certain widening countries.<sup>285</sup> Under Horizon Europe, widening actions have increased their focus on fostering brain circulation across the ERA by facilitating the mobility of researchers, both across countries and across sectors. The ERA Fellowships provide a chance for unsuccessful applicants to the MSCA Postdoctoral Fellowships to carry out their research in a widening country. As of 2 December 2024, 267 researchers benefitted from the scheme. Local stakeholders appreciate these actions as they encourage mobility to widening countries<sup>286</sup>.

Encouraging mobility and new collaborations is particularly important, as researchers in Widening countries are still less connected than those in non-widening countries, as evidenced by them seldom taking a central role in collaboration networks<sup>287</sup>. Almost 90% of beneficiaries

<sup>280</sup> <https://www.cost.eu/>. As of 2 December 2024, COST received EUR 273 million from the Horizon Europe budget.

<sup>281</sup> Excellent Science evaluation study, Annex I, p. 221. A list of ‘inclusive target countries’, not fully overlapping with widening countries, exists in COST: <https://www.cost.eu/uploads/2022/06/COST-Action-Booklet-220607.pdf>

<sup>282</sup> Excellent Science evaluation support study, Annex I, p. 218. <https://data.europa.eu/doi/10.2777/9552959>

<sup>283</sup> Excellent Science evaluation support study, p. 58. <https://data.europa.eu/doi/10.2777/2295765>

<sup>284</sup> Ibid, p. 61.

<sup>285</sup> ECA, Special Report 15/2022, par. 63-64. <https://www.eca.europa.eu/en/publications?did=61346>

<sup>286</sup> Excellent Science evaluation support study, p. 29. <https://data.europa.eu/doi/10.2777/2295765>

<sup>287</sup> Excellent Science evaluation support study, p. 32. Statement based on Horizon 2020 data, due to the very limited number of publications reported at this stage of Horizon Europe. <https://data.europa.eu/doi/10.2777/2295765>



of widening actions who responded to the evaluation survey found that their project creates or strengthens collaborations with leading research organisations<sup>288</sup>. Case study evidence also highlights the added value of Horizon Europe support to cross-border collaborations and networking, as there are no comparable grants available in widening countries<sup>289</sup>.

Widening actions are not designed to have a significant direct effect on commercialisation of research results. Most widening actions focus on coordination and support, and are not expected to result in innovation outputs. Private for-profit entities (including SMEs) are underrepresented in these actions compared to most other parts of the FP<sup>290</sup>. Widening actions therefore have a relatively few programme newcomers (17.2% of all participants), as most new participants in R&I programmes come from the private sector. However, compared to Horizon 2020, efforts were made under Horizon Europe to include the private sector in actions such as the new Excellence Hubs, and in the first call dedicated to dissemination and exploitation launched in 2023<sup>291</sup>. As of 6 January 2025, 12.9% of participants in widening actions are from private for-profit entities compared with 2% at the end of Horizon 2020.

The European Court of Auditors highlighted that a sustainable improvement in FP participation in widening countries can only be achieved through higher national R&I investment levels and structural reforms. In 2022, of the 15 EU widening countries, only Slovenia and Czechia spent over 2% of GDP on R&D<sup>292</sup>. Widening actions aim to spur structural changes in the institutions, regions and countries involved, but the absence of a clear definition of structural changes in the context of the widening actions makes it difficult to monitor and evaluate their effects<sup>293</sup>.

*What messages emerged from the stakeholder consultation?*

Stakeholders expressed their level of agreement on whether Horizon Europe is on track to **foster excellence-based participation from all Member States, including low R&I performing countries**. Among the 1 547 respondents, 67% (strongly) agreed (1 060) that this is the case. Respondents from academic or research institutions were the most positive (50%; 535), followed by companies (18%; 193) and EU citizens (11%; 120). Only 5% of respondents (73) indicated that they (strongly) disagree.

Horizon 2020's *ex post* evaluation found that national implementation plans were often not updated in response to the periodic feedback of the Policy Support Facility (PSF)<sup>294</sup>. Under Horizon Europe, PSF was strengthened thanks to a new service, PSF Open, aimed at providing support for the implementation of previous PSF country reviews. In 2023, the first two PSF Open exercises (for Romania and Greece) were carried out.

Under Horizon Europe the PSF has so far supported 32 Member States and associated countries, with Belgium, Austria and Romania being the most active participants. The 11 mutual learning exercises (MLEs) covered a range of topics such as the decarbonisation of industries, national policies for knowledge valorisation and the implementation of EU Missions.

A network analysis<sup>295</sup> shows that over one third of countries are connected through **researchers participating in Horizon Europe-funded projects**, and that **Pillar I is the Horizon Europe Pillar with the most globally connection**. Nevertheless, some flagship topics in Pillar II are key for the international positioning of the EU (e.g. those contributing to globally coordinated assessments such as the ones produced by the IPCC and IPBES). The most central countries (i.e. those with the highest population density) in the European research ecosystem under Horizon

<sup>288</sup> Excellent Science evaluation support study, p. 37. <https://data.europa.eu/doi/10.2777/2295765>

<sup>289</sup> Ibid, p. 57

<sup>290</sup> Source: Corda data on 2 December 2024.

<sup>291</sup> Excellent Science evaluation support study, Annex I, p. 219. <https://data.europa.eu/doi/10.2777/9552959>

<sup>292</sup> Eurostat, Source dataset: [rd\\_e\\_gerdtdot](#) (2022 is the latest available year).

<sup>293</sup> Excellent Science evaluation support study, p. 34. <https://data.europa.eu/doi/10.2777/2295765>

<sup>294</sup> SWD (2024) 29, p. 88. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52024SC0029>

<sup>295</sup> Excellent Science evaluation support study, 2024, Annex 6 'Quantitative research track findings'.

Europe are Germany, France, Italy and Spain. **Non-widening countries are generally more connected than widening countries.** Nevertheless, among widening countries, researchers from Greece, Portugal, Poland and Czechia are found to be **central to the European research ecosystem**<sup>296</sup>.

**The ERC plays an important role in making the EU research system more attractive to both European and non-European researchers.** Interviews and stakeholders' position papers praise the size of the funding, the flexibility for ground-breaking research and the length of projects<sup>297</sup>. However, participation by the private for-profit sector remains limited.

**The EIT Regional Innovation Scheme (EIT RIS)** addresses the innovation divide in Europe through capacity building support which reached over 87 000 participants<sup>298</sup>, created and supported over 2 500 ventures and launched 360 innovations on the market. A network of EIT hubs/offices and 887 partners has been created. Through this place-based approach to innovation, the EIT bridges also towards relevant regional Smart Specialisation Strategies<sup>299</sup>.

*What messages emerged from the stakeholder consultation?*

67% of respondents (1 035) (strongly) agreed that Horizon Europe is on track to strengthen and **increase the impact and attractiveness of the European Research Area**. Non-EU citizens were the most likely to agree or strongly agree with the statement (85%; 28) than EU citizens (68%; 85), and 70% of respondents from academia (557) and NGOs (44) supported the statement.

#### 4.1.5. Exploitation and dissemination of results

In Horizon Europe, **focus is put on: (i) beneficiaries' best efforts** to exploit the results they own and to disseminate their results as soon as feasible; **and (ii) and the responsibility of the project consortium to disseminate and exploit results**<sup>300</sup>. Projects are requested to: (i) identify and to declare ownership of projects results in the reporting template; (ii) list their key exploitable results and (iii) prepare a plan for dissemination and exploitation during the project and after it ends. Previously, Horizon 2020 was found to fail reaching satisfactory levels of dissemination of scientific results within the scientific community and to policymakers<sup>301</sup>. Concerns were raised about the resources and skills required for dissemination and the need for continued knowledge management after the end of projects. Shortcomings in dissemination may contribute to a limited uptake of Horizon 2020 results<sup>302</sup>.

The Commission provides the tools and services described below to address Horizon Europe beneficiaries' needs.

- The **Horizon Results Platform**, set up in 2019, provides a space for beneficiaries to raise the visibility of project results of Horizon Europe, its predecessors and other EU-funded

<sup>296</sup> In terms of the degree of centrality (how many connections each network node has), closeness centrality (how close each node is to others in the network), and betweenness centrality (how important a node is to the network information flow).

<sup>297</sup> Excellent Science evaluation study, Annex 1, p. 21, <https://data.europa.eu/doi/10.2777/9552959>

<sup>298</sup> By 2022, from the modest and moderate innovator countries according to European Innovation Scoreboard.

<sup>299</sup> Innovative Europe evaluation study, 2024, Annex 4, Case study 12, p. 272-280

<sup>300</sup> As per the Article 39 of the Horizon Europe regulation, each beneficiary that has received Union funding shall use its best efforts to exploit the results it owns, or to have them exploited by another legal entity. Exploitation may be direct by the beneficiaries or indirect through the transfer and licensing of results in accordance with Article 40. If, despite a beneficiary's best efforts to exploit its results directly or indirectly, the results are not exploited within a given period as established in the grant agreement, the beneficiary shall use an appropriate online platform as identified in the grant agreement to find interested parties to exploit those results. The beneficiaries are best placed to maximise the impact of their own research by communicating, disseminating, exploiting during the project's lifetime and after the project's completion.

<sup>301</sup> Green Transition evaluation study supporting the final evaluation of Horizon 2020 (2023), Section 3.1.5.2.

<sup>302</sup> Resilient Europe evaluation study supporting the final evaluation of Horizon 2020 (2023), pp. 41, 129. Annex V.

programmes. Beneficiaries who, despite their best efforts, have not succeeded in exploiting their results are required to disseminate their key exploitable results via the Platform.

From 2020 to 2022, the Horizon Results Platform saw an increase in visitors from 21 283 to 37 650 and showcased a total of 3200 key exploitable results, 65 coming from Horizon Europe<sup>303</sup>. The platform also supports networking and pitching events in collaboration with organisations representing early-stage investors. However, there is a difficulty in enforcing the requirement to disseminate results on the Platform as this step is taken at the end of the grant agreement.<sup>304</sup>

- The **Horizon Results Booster-I** (2020-2024) and the improved Horizon Results Booster-II (from 2024) also provide free support and guidance services to beneficiaries for disseminating and exploiting their results. Between September 2020 and September 2024, the Horizon Results Booster-I delivered 1 521 services: 938 on the portfolio dissemination & exploitation strategy (PDES), 285 on business plan development (BPD) and 298 go-to-market services (G2M - innovation management, pitching, intellectual property support, feasibility studies, start-up support)<sup>305</sup>. There were 78 requests for IPR services, which provide support to beneficiaries in clarifying intellectual property and non-disclosure agreements, especially for collaborative ventures and spin-offs. Feedback from interviews about these services was positive, but there is scope for more beneficiaries to use these services<sup>306</sup>.
- The EIC's **Business Acceleration Services** provided non-financial support to over 4 000 companies and innovators to connect with procurers and investors, helping to increase their likelihood of market entry and up-scale EIC-funded innovation. They facilitated 440 introductions to corporates, public and private procurers resulting in follow-ups (with over a quarter resulting in a commercial contract including for example the deployment or integration of a product).
- **CORDIS** (Community Research and Development Information Service) is the European Commission's primary source of results from EU-funded research projects, spanning FP1 to Horizon Europe. Having attracted over 6.5 million visitors in 2024, it offers a structured public repository with project factsheets, participants, reports, Intellectual Property Rights, and links to open-access publications, along with articles, videos and podcasts in six languages. Projects are classified by scientific fields using the European Science Vocabulary Taxonomy (**EuroSciVoc**).

The evaluation also found a variety of project activities that were carried out to engage the public and end users in projects – a summary is provided in Annex 9.

*What messages emerged from the stakeholder consultation and beneficiaries survey?*

The beneficiaries' survey, which was carried out between May and July 2023, highlighted an improvement compared with the results of the previous stakeholder consultations. Approximately 63% of respondents report that the Commission platforms and measures (e.g. Horizon Results Booster, Horizon Results Platform, IPR Helpdesk) help facilitate the uptake of projects' research findings to a (very) large extent.

According to stakeholders, the most helpful Commission-related exploitation services in view of dissemination, exploitation and access to research and innovation results are CORDIS (75%; 1 524), the Horizon Dashboard (59%; 1 517), the Horizon Results Platform (55%; 1 514) and the Horizon Results Booster (48%; 1 520).

<sup>303</sup> Typically, Key Exploitable Results become available towards the end of a project's lifecycle, with many Horizon Europe projects still ongoing, particularly RIA and IA, results will not become available until more projects conclude.

<sup>304</sup> Green Transition evaluation study, 2024, section 14.4.2. <https://data.europa.eu/doi/10.2777/67934>.

<sup>305</sup> HRB services are available to beneficiaries of Horizon Europe and its predecessors (Horizon 2020 and FP7). The figures represent all services provided. For Horizon Europe specifically, data estimates are 192 for PDES, 44 for PD, and 85 for G2M, including 29 for IPR services.

<sup>306</sup> Green Transition evaluation study, 2024, Section 14.4.2. <https://data.europa.eu/doi/10.2777/67934>.

Excluding 'I do not know / no opinion' replies, the Horizon Results Platform is appreciated the most by NGOs (97%; 34), public authorities (92%; 44) and companies (91%; 139)<sup>307</sup>. Similarly, the Horizon Results Booster is best received by business associations (100%; 20), followed by NGOs (97%; 32) and companies (88%; 118)<sup>308</sup>.

Besides Commission platforms, 55% (832) of respondents to the public consultation indicated that they (strongly) agree that **patents** helped to disseminate, exploit and give access to research and innovation results. 41% of respondents from business associations (15) and 32% of companies (82) indicated that patent filing fosters dissemination and exploitation of results 'to a great extent'.

## 4.2 Efficiency

The first part of this section assesses the costs of Horizon Europe by stakeholder group, complementing the benefits presented in the previous section. It then reports on the administrative targets set, assesses the programme's value for money, looks at how simplification measures (aimed at efficiency savings) have performed so far and discusses the areas for further simplification.

A public sector evaluation considers costs to society, including those incurred by programme participants. As a centrally managed programme, Horizon Europe is in the exceptional situation of not only recording its current administrative and operational expenditure but also being in direct contact with its participants. Through a particular emphasis on the detailed quantitative assessment of the costs for applicants and beneficiaries, this interim evaluation hopes to contribute to a better understanding of large EU funding programmes' cost characteristics<sup>309</sup>.

### 4.2.1 Costs of Horizon Europe by stakeholder group

**1. The cost of investment in R&I at EU level** is covered by Horizon Europe's **operational expenditure** budget of **EUR 88 322 million**<sup>310</sup>. It is the programme's main input cost, incurred by EU society and funded mainly through the Union's budget. Until the end of 2024, **EUR 56 561 million**<sup>311</sup> have been **committed** and **EUR 30 883 million**<sup>312</sup> have been **paid out to beneficiaries**<sup>313</sup>.

**2. Horizon Europe's administrative expenditure** budget of **EUR 5 623 million** is the **EU Public Sector's administrative costs** and is funded mainly through the EU budget. Until the end of 2024, **EUR 3 317 million**<sup>314</sup> have been **committed** and **EUR 3 174 million**<sup>315</sup> have been paid out<sup>316</sup>.

**3. Beneficiaries** incur **administrative costs** to fulfil specific requirements to manage their projects, set out in their grant agreements, that they would otherwise not have spent. While beneficiaries are compensated for all administrative costs through grant payments, any avoidable

<sup>307</sup> The Horizon Results Platform helped: (1) to a great extent, (2) somewhat, (3) a little.

<sup>308</sup> The Horizon Results Booster helped: (1) to a great extent, (2) somewhat, (3) a little.

<sup>309</sup> The findings reported in this part of the evaluation are based on the analysis in annex 4 (Efficiency).

<sup>310</sup> Horizon Europe's budget (2021-2027), including different sources of the budget is discussed in section 2.1.

<sup>311</sup> This includes EUR 52 251 million, or 59.2%, of the voted budget including NGEU funds, plus EUR 4 310 million in internal and external assigned revenues.

<sup>312</sup> This includes EUR 29 574 million, or 33.5%, of the voted budget including NGEU, plus EUR 1 308 million in internal and external assigned revenues.

<sup>313</sup> Direct point for comparison not available for Horizon 2020 and FP7 not available. Close point of comparison: 38% of the total Horizon 2020 budget committed in the first three years of the programme.

<sup>314</sup> This includes EUR 2 978 million, or 53.0%, of the voted budget including NGEU funds, plus EUR 339 million in internal and external assigned revenues.

<sup>315</sup> This includes EUR 2 875 million, or 51.1%, of the voted budget including NGEU funds, plus EUR 299 million in internal and external assigned revenues.

<sup>316</sup> Comparable figures for the first three years of Horizon 2020 and FP7 are not available. The committed total Horizon 2020 budget share of the first three years is dominated by the operational expenditure.



part of the effort generated by the framework programme's requirements reduces its overall efficiency.

**About half of the beneficiaries agreed to some extent that 'project reporting requires reasonable effort and costs', while 14% disagreed<sup>317</sup>. Around 40% of the beneficiaries experienced project management and implementation in Horizon Europe as neither simpler nor less simple than in Horizon 2020, while 28% found it at least somewhat simpler and 9% less simple than before<sup>318</sup>.**

The evaluation collected robust quantitative evidence on **beneficiaries' administrative costs as share of their total project costs**<sup>319</sup>. These costs cannot be interpreted as pure 'administrative burden' as they are likely to cover tasks that would have been associated with running the projects in any case. For almost all programme parts, the median and the most common responses indicated that **6% to 10% of the project budget is allocated to administrative tasks**<sup>320</sup>. This result also holds for the median consortium-run project, while median coordinators, when considered separately, reported a higher range of 11% to 15%. Mono-beneficiaries (Pillar I and III, as well as SME respondents) also typically face administrative costs equal to between 6% and 10% of the project budget.

At the level of programme parts<sup>321</sup> in total, for **all projects signed under Horizon Europe so far, beneficiaries are expected to spend between EUR 4.75 billion and EUR 6.47 billion in administrative costs** over their entire project lifetime. This is equivalent to 9% - 12% of the total project cost signed so far. This estimated total cost is already an order of magnitude higher than the estimate of the final Horizon 2020 evaluation (EUR 135 million to EUR 215 million over the entire framework programme). The differences are likely driven by improvements in data quality and a change in the design of the survey questions rather than actual underlying changes in beneficiaries' administrative costs<sup>322,323</sup>.

**4. Successful and unsuccessful applicants**, the largest stakeholder group of Horizon Europe, incur **application costs** when preparing and submitting their proposals. Application costs are one of the programme's costs on EU Society and have an effect on its value for money. They are partially unavoidable as quality proposals require effort up front to allow for the most promising projects to be identified, which in turn maximises the chances of generating higher benefits for society. However, the application costs have the potential to introduce inefficiencies into the programme<sup>324</sup>.

**For around 40% of applicants, the overall effort to prepare a proposal is 'acceptable', while a quarter disagreed<sup>325</sup>. Applicants also suggest there has been no substantial shift in the**

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<sup>317</sup> 'Project reporting requirements require reasonable effort and costs' 12% (727) strongly agree, 40% (2455) rather agree, 22% (1378) neither agree nor disagree, 11% (668) rather disagree, 3% (187) strongly disagree, 13% (793) do not know / not applicable.

<sup>318</sup> 'Project management and implementation (...) is simpler in Horizon Europe than in HH2020. (n = 3286); 5% (150) strongly agree, 23% (760) rather agree, 41% (1350) neither agree nor disagree, 7% (245) rather disagree, 2% (59) strongly disagree, 22% (722) do not now/ not applicable.

<sup>319</sup> 5 161 responses (excl. 'do not know'), targeted survey. Further discussion and questions, in Annex 4.1.1.

<sup>320</sup> For programme parts deviating from this pattern, and additional details on administrative costs, see Annex 4.1.1.

<sup>321</sup> Using the shares of respondents (who selected each administrative cost range) as a weight, the ranges themselves, and the aggregated total project cost by programme part, excluding EIT. See also Annex 4.1.1.

<sup>322</sup> The Horizon 2020 estimate was less robust but was also based on a more granular question. See Annex 4.1.1.

<sup>323</sup> Beneficiaries' administrative costs are targeted by simplification measures, discussed in section 4.2.3, with potential for further simplification covered in section 4.2.4

<sup>324</sup> As the total number of applicants is very high and the vast share of applicants is unsuccessful, a small avoidable burden in the application process has the potential to introduce a sizeable inefficiency into the programme.

<sup>325</sup> to a 'large extent' (32%, 5 443), 'very large extent' 10% (1733), while 32% are moderately supportive and 24% (4254) effectively did not find it acceptable. (See Annex 4.1.2.1)



## proposal preparation effort required to apply for Horizon Europe funding compared with Horizon 2020<sup>326,327</sup>

Relative to the **complexity of the proposed projects**, **60% of applicants<sup>328</sup> find the overall application effort proportionate**. Just over half of the applicants consider their effort proportionate to the **number of consortium partners involved<sup>329</sup>** and to **the size of the grant<sup>330,331</sup>**. However, when comparing the proposal preparation effort to **the chances of success**, **44% of applicants consider their application costs disproportionate** and only a third of applicants still rate the effort as proportionate<sup>332</sup>. A further breakdown of the responses by programme part reveals some variation, with EIC and ERC applicants being most affected<sup>333</sup>. Additional feedback submitted to the survey's open questions and the public consultation similarly raise strong concerns about the absolute level of effort required in light of the chance of success<sup>334</sup>. **Taken together, despite the increased success rates and budget of Horizon Europe, there is strong qualitative evidence that for a substantial share of applicants the application cost is not proportionate to their chances of securing Horizon Europe funding.**

The evaluation substantially improved the available quantitative evidence on proposal preparation costs of R&I framework programmes<sup>335</sup>. Proposal preparation costs of consortia (multi-beneficiary grants) combine the costs of coordinators, shouldering most of the effort, with those of contributing partners. Overall, the **median consortium coordinator spends between 36 to 45 person-days per proposal**. The effort for contributing **consortium partners** is typically lower, spending **16 to 25 person-days<sup>336</sup>**.

The median effort required by **mono-beneficiaries** (ERC and MSCA PF, as well as for EIC Accelerator<sup>337</sup>) **is comparable to that of coordinators, at 36 to 45 person-days<sup>338</sup>**. Although mono-beneficiaries do not have to coordinate partners during the proposal preparation phase, they are required to fulfil most of the same steps as coordinators. However, mono-beneficiaries are diverse. In the case of the EIC Accelerator, proposals apply for substantial grants and equity budgets through pitching decks and full business plans, which can be used for investment commercialisation purposes beyond the EIC. This is also reflected in the comparatively high share (26%) of EIC Accelerator applicants, particularly successful ones (43%), who reported very high application costs of over 65 person-days.

The time spent on proposals is influenced by metrics that relate to the size of the project. More than the size of the grant, **the consortium size is a dominant factor influencing the time cost of coordinators**. According to the survey, the effort increases in steps, by about **10 person-days for every additional 15 partners**, pointing to the key role of coordination costs already at the application stage. Proposals for **projects of a longer duration** also take coordinators **more time**

<sup>326</sup> This finding is supported by the targeted consultation, as well as responses to the public consultation. For details, see Annex 4.1.2.1 (costs of applicants - qualitative evidence), Figure 11.

<sup>327</sup> Ineligible proposal rates, at 3.5%, are higher than in Horizon 2020, which could be linked to complexity.

<sup>328</sup> 45% 'to a large' (7 801 respondents) and 15% 'to a very large' extent (2 596 respondents)

<sup>329</sup> 44% 'to a large' (5 337 respondents) and 12% 'to a very large' (1 495 respondents)

<sup>330</sup> 13% 'to a large extent' (2 200 respondents) and 40% 'to a very large extent' (6 885 respondents).

<sup>331</sup> In all three cases a minority consider the costs disproportionate. Complexity: 13% (2283), consortium partners: 12% (1479), size of grant: 17% (2872) (See Annex 4.1.2.1 Figure 12)

<sup>332</sup> (6761 respondents); 34%: 24% 'to a large extent' (4 051) and 10% 'to a very large extent' (1759).

<sup>333</sup> See Figure 13, Annex 4.1.2.1

<sup>334</sup> See Annex 4.1.2.1 and Section 4.2.4.

<sup>335</sup> Based on 17 254 responses of unsuccessful and successful applicants to a targeted survey question, sent to the population of applicants, matched to data on applicants. For further discussion and question, see Annex 4.1.2.3.

<sup>336</sup> Co-ordinators' mode at 'above 65 person-days'. Partners' result: median and mode; Finding holds across most characteristics, but not for consortia of > 30 partners, where partners spend 6 - 15 person-days (median and mode).

<sup>337</sup> For a further split by action, please refer to Annex 4.1.2.2.

<sup>338</sup> Mode ERC applicants (20%), equally reported very high application costs of 'more than 65 person days'.

**to prepare.** Projects of **up to two years** see coordinators typically investing **26-35 person-days**, whereas those of two to four years typically take **36-45 person days**. Costs vary by the type of funding instrument, with higher costs associated with those instruments with the higher grant amounts, larger consortia and longer projects.

Proposal preparation costs vary based on the applicants' experience and their skill sets. **Experienced applicants spent more time** on their proposals than first-time applicants. Applicants who **used consultancies** (but were not consultancies themselves) typically took **about 10 person-days more**. This increase was not observed for consultancies acting as coordinators, whereas consultancies who contributed as consortium partners even typically reported spending about 10 person-days less than the average. **Coordinators that prepared proposals that ended up securing funding typically had spent more time** than those whose proposals were unsuccessful. For further details and analysis of the results, see Annex 4.1.2.2.

Analysing the median number of days dedicated to the application process, breaking down the data by applicant role and the size of their consortium, **it is estimated that the total application cost for Horizon Europe so far reaches between EUR 1.92 billion and EUR 2.82 billion**<sup>339</sup>. This corresponds to an **average cost per proposal of EUR 21 000 to EUR 32 000**, or EUR 34 000 to EUR 50 000 per EUR 1 million of committed operational expenditure. Our level of confidence in the order of magnitude of these new estimates is high, due to the improved source of evidence and a more robust and granular estimation approach.

These estimates are based on Horizon Europe's committed operational expenditures up to 2024, therefore not covering the entire programme. When projected to the total expenditure of the programme, the estimated total application cost of Horizon Europe is expected at the end to amount to EUR 3.1 to 4.5 billion. In comparison, the Horizon 2020 final evaluation estimated that the average cost of a proposal fell between EUR 18 000 and EUR 37 000, which corresponds to EUR 79 000 to 158 000 per EUR 1 million of operational expenditure. The estimate of the Horizon 2020 final evaluation was not robust. **Differences between the estimated application cost for Horizon 2020 and Horizon Europe should not be interpreted as a change in the actual underlying costs.** It will be possible to assess a change in the costs of applicants in the interim evaluation of the next framework programme.

While around **30% of Horizon Europe applicants prepared their proposals without any support**, around **50%** received help from a **dedicated department in their organisation**, around **20%** received support from a **National Contact Point (NCP)** and **17%** commissioned support from a **consultancy or expert** (inside or outside the consortium)<sup>340</sup>. Comparatively high shares of applicants used **consultancies** in **Pillar III** (46%), particularly the **EIC Accelerator** (67%), and to some extent also in **Pillar II Cluster 1** (28%). **Innovation Action** applicants had the highest shares using external consultancies (24-36%)<sup>341</sup>. Quantitative survey evidence<sup>342</sup> suggests that the **median consultancy fee** is **EUR 7 500** for **consortia** proposals, **EUR 2 000** for **mono-beneficiaries** and **EUR 12 000** for **EIC Accelerator** proposals.

The use of external or internal consultancies or an internal department in the proposal preparation process, does not necessarily indicate programme inefficiencies. Applicants make their choices based on their skill set, value of time and available resources. Concerns can arise where participation effectively depends on the use of costly support. Given the figures above and that

<sup>339</sup> Excluding EIC Accelerator applications, due to low quality monitoring data. For the detailed methodology and findings, see Annex 4.1.2.

<sup>340</sup> Survey responses: 'No support': 29% (2 141 responses), internal department: 51% (3688), NCPs: 19% (1397), consultancies: 17% (1252). Multiple selection possible. For the survey question and further details in Annex 4.1.2.3.

<sup>341</sup> Resilient Europe study Annex 1.3.3. Estimate based on survey responses matched with monitoring data.

<sup>342</sup> 658 survey respondents. Fees paid to external consultancies for proposal preparation and related advice can be understood as a monetisation of parts of the application costs, reducing the number of person-days that applicants would otherwise have spent. For the survey question and a further breakdown, see Annex 4.1.2.3.

the overwhelming majority (**74-80%**) of **Horizon Europe proposals above the quality threshold are written without the involvement of external consultancies**<sup>343</sup>, this does not seem to be generally the case, although it may apply to specific programme parts.

#### 4.2.2 Performance against administrative targets & value-for-money of Horizon Europe

##### *Administrative efficiency of the EU public sector*

Two types of quantitative performance targets<sup>344</sup> set out expectations about the administrative efficiency of the EU public sector managing Horizon Europe: (i) the administrative time performance targets; and (ii) the share of administrative expenditure overall.

(i) The evaluation assessed Horizon Europe's performance in meeting time-based targets<sup>345</sup>. According to the **time-to-grant (TTG) target**<sup>346</sup>, each grant agreement (except for ERC calls)<sup>347</sup>, has to be signed **eight months** (245 days) after the proposal submission deadline. Under Horizon Europe, this target has been met so far, even though as of January 2025, with an **average time-to-grant period of 240 days**, Horizon Europe lags behind Horizon 2020's average overall performance (187 days). **77% of grants have been signed on time**, compared to 90% under Horizon 2020 and 41% under FP7. Across programme parts, times-to-grant vary between **Widening and ERA (230 days, 88%)** and **Pillar II (244 days, 87%)**.

**Horizon Europe without the EIC** reaches a TTG of 241 days (240 days when excluding EIC Accelerator only), staying behind the performance of Horizon 2020 without SMEI (209 days) but still on the target<sup>348</sup>. Horizon Europe's TTG performance fluctuates month by month. The above values report the average values on 6 January 2025.

(ii) Horizon Europe's **administrative expenditure** has been set a **maximum ceiling of 5%** of overall expenditure<sup>349</sup>. The ceiling definition only considers expenditure drawing on certain budget sources (only the budget in the legal base) and the expenditure linked to indirect research, which excludes the JRC. Based on this definition, Horizon Europe's administrative expenditure meets the 5% ceiling: to date it reaches **4.01%**<sup>350</sup>.

##### *Value for money of Horizon Europe*

The costs and benefits reported in the evaluation are used to assess Horizon Europe's societal value-for-money by calculating an approximate **public sector benefit cost ratio (BCR)**. Conceptually, this metric relates the total welfare benefits of the programme to the total cost associated with it<sup>351</sup>. The closest available proxy for a total welfare benefit of Horizon Europe are the macro-economic forecasts of its long-term GDP impact (Section 4.1.3). Quantified benefits other than GDP (e.g. number of patents, effects on employment) are not added again to avoid double-counting. The EU public sector's (already committed) expenditure and the

<sup>343</sup> Resilient Europe study, Annex 1.3.3. Estimate based on survey responses matched with monitoring data.

<sup>344</sup> It is too early in the programme to assess the error rate of the framework programme.

<sup>345</sup> Time to inform, time to sign, time to pay data, as well as breakdowns of time to grant in Annex 4.2.

<sup>346</sup> TTG is set out in Article 31 of the Horizon Europe Regulation, by derogation from Article 197 (2), the time to grant is 8 months from the deadline for submission of the proposals.

<sup>347</sup> ERC: TTG may exceed the target if justified (e.g. complex actions, many proposals, and request by applicants).

<sup>348</sup> The evaluation did not find international benchmarks for TTG, with available targets focussing mainly on the proposal evaluation phase (time-to-inform). See Annex 4.2

<sup>349</sup> Regulation (EU)2021/695, Article12(6).

<sup>350</sup> Expenditure data extracted on 21 November 2024.

<sup>351</sup> The difference between a (public sector) benefit cost ratio of a programme and a (private sector) return-on-investment is that the BCR takes the wider perspective of EU society and should include all costs and benefits that affect welfare. A BCR of 1 (break-even) indicates that each euro of costs that the programme generated welfare benefits equivalent to one euro.

estimated incurred total cost of applicants (both Section 4.2.1) make up the total cost. Beneficiaries' administrative costs are compensated by grants and therefore not added again.

While the costs associated with Horizon Europe are incurred early on, its benefits only emerge over a long period of time. A meaningful assessment of the overall benefit-cost relationship at this point thus has to involve forecast benefits that have not yet materialised. To anchor the forecast to evidence on the programme's performance at interim stage, the evaluation only considers the GDP effect that is expected from R&I activities, for which grants have already been signed. Two macro-economic forecasts are used, leading to two very similar ratios.

Based on the above, the **benefit cost ratio** (dividing total benefit by total cost) reaches a value between 5 and 6, consistent with a high value for money that reflects the potential of R&I support to generate substantial benefits over a longer time horizon. This suggests that **one euro of costs to EU society associated with the programme (programme costs and costs to applicants) is estimated to bring about 5 to 6 euro of benefits for EU citizens (measured through GDP impact) in the period up to 2045 (25 years)**<sup>352</sup>.

#### 4.2.3 Performance of Horizon Europe's simplification measures

##### *Rationalisation of the European Partnership landscape*

The interim evaluation of Horizon 2020 found that the partnership landscape had become excessively complex over time, failing to adequately align with policy objectives at EU and national level<sup>353</sup>. Under Horizon Europe, the number of partnerships was therefore initially reduced to 49 from 120 under Horizon 2020. This number later increased to 50 after extension of the Partnership on Research and Innovation in the Mediterranean Area (PRIMA)<sup>354</sup>. Furthermore, during the 2025-2027 period, 10 new partnerships will be launched<sup>355,356</sup>, bringing the total number to 60. The types of partnership were limited from 7 to 3, namely co-funded, co-programmed and institutionalised partnerships. The selection process of co-programmed and co-funded partnerships was integrated into the strategic planning process of Horizon Europe<sup>357</sup> with the expectation that this would support the reorientation towards EU priorities and enable an impact-driven approach. The number of partnerships is increasing again in Horizon Europe: the strategic plan for 2025-2027 announced nine new co-funded and co-programmed partnerships<sup>358</sup>. While the rationalisation primarily affected public-private partnerships, new additions involve the private sector.

The closer integration of partnerships into the programme has had some effects: evidence from two evaluation support studies<sup>359</sup> suggests that some **areas covered by partnerships are now better coordinated**. This has in turn led to a substantial increase in public funding from EU Member States and a stronger collaboration at programme level. Respondents to the public consultation provided positive feedback on the streamlining of partnerships. Overall, 53% (472) of respondents 'agreed' or 'strongly agreed' that 'the rationalisation of European Partnerships

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<sup>352</sup> The Impact Assessment of Horizon Europe did not include a benefit cost ratio as point for comparison.

<sup>353</sup> Council Regulation (EU) 2021/2085 establishing the Joint Undertakings under Horizon Europe, Recital (4).

<sup>354</sup> [https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/european-partnership-research-and-innovation-mediterranean-area-prima-has-been-successfully-extended-2024-04-19\\_en](https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/european-partnership-research-and-innovation-mediterranean-area-prima-has-been-successfully-extended-2024-04-19_en)

<sup>355</sup> <https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/6abcc8e7-e685-11ee-8b2b-01aa75ed71a1>

<sup>356</sup> <https://education.ec.europa.eu/news/new-eit-knowledge-and-innovation-community-will-focus-on-water-marine-and-maritime-sectors-and-ecosystems>

<sup>357</sup> SWD(2018)307final, 2/3 - p. 111. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018SC0307>

<sup>358</sup> Strategic plan for 2025-2027, p. 33.

<sup>359</sup> Digital and Industrial Transition evaluation study, 2024, Section 9, <https://data.europa.eu/doi/10.2777/845650> and Green Transition evaluation study, 2024, Section 12.3, <https://data.europa.eu/doi/10.2777/797281>.



had allowed additional public and private investments in R&I to be leveraged'<sup>360</sup>. In addition, 49% (435) of respondents 'agreed' or 'strongly agreed' that 'the rationalisation of European Partnerships has led to delivering more solutions for the benefits of society, the environment, and the economy'<sup>361</sup>.

The integration of different communities from the previous partnerships has, however, not yet been completed<sup>362</sup>, and the **monitoring of partnership results faces challenges**, not least as far as additional activities are concerned (private investments outside the programme but contributing to the objectives of the partnership)<sup>363</sup>. Some partnerships have just recently been set up and are still drawing up their KPIs. Others find it difficult to identify suitably flexible KPIs, which would enable them to incorporate new innovation approaches. They also have difficulties in coordinating their monitoring frameworks with that of Horizon Europe and with the reporting standards of projects<sup>364</sup>. In addition, four partnerships reported that monitoring arrangements have given rise to disproportionate administrative costs for partners and project participants<sup>365</sup>. The fragmented monitoring of partnerships, and in some cases reliance on ad hoc reporting exercises, has had a negative effect on the extent to which partnership performance could be evaluated<sup>366</sup>. An assessment of the administrative costs (running costs) of institutionalised partnerships can be found in Annex 4.4.1.

### *Lump sum funding*

Lump sum funding is a simplification measure that removes financial reporting requirements, which reduce the reporting burden on beneficiaries (and saves them administrative costs). Lump sum grants also help to avoid financial errors and contribute to a shift of focus during the grant implementation stage away from financial controls and back to a project's content.

Under Horizon Europe, the use of lump sum grants has been gradually extended, building on previous, generally positive assessments<sup>367</sup>. As of 1 January 2025, a total of **1 582 lump sum grants have been signed for a total value of EUR 3.03 billion**, of which 706 ERC Proof of Concept (PoC) grants (EUR 106 million) and 876 lump sum grants (EUR 2.93 billion) in other programme parts<sup>368</sup>.

Lump sum funding has prompted stakeholder reactions. Positive feedback welcomes the reduction in reporting burden and stresses the simplification for new beneficiaries. Concerns, particularly from some larger beneficiary organisations, centre on the topics of application costs,

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<sup>360</sup> Percentage after excluding responses of 'I do not know'. In comparison, 31% 'neither agreed or disagreed', and 17% 'disagreed' or 'strongly disagreed'.

<sup>361</sup> 16% 'disagreed' or 'strongly disagreed' and around a third of respondents (34%) 'neither agreed or disagreed'. See section 'Effectiveness of the EU Missions and European Partnerships' in Annex 5 Stakeholder consultation.

<sup>362</sup> Digital and Industrial Transition evaluation study, 2024, Section 9, <https://data.europa.eu/doi/10.2777/845650>

<sup>363</sup> Based on 18 out of the 39 partnership evaluation reports.

<sup>364</sup> Evaluation of the EIT Climate-KIC, Section 8; European Partnership – Towards zero-emission road transport (2ZERO), Section 4.7; European Partnership on Connected and Automated Driving (CCAM), Section 4.10.

<sup>365</sup> Evaluation of EIT Health, Section 4.5, 2024, <https://data.europa.eu/doi/10.2777/049770>; Evaluation of the Partnership 'People Centric Sustainable Built Environment', Section 3.3; Evaluation of the European Partnership Clean Aviation Joint Undertaking, Section 4.3, 2024, <https://data.europa.eu/doi/10.2777/403632>; Evaluation of the European Partnership on the Assessment of Risks from Chemicals, 2024, directionality section, <https://data.europa.eu/doi/10.2777/001851>.

<sup>366</sup> Annex 7 highlights several monitoring limitations across different types of partnerships, in particular data discrepancies across several resources and limitations of internal reporting for institutionalised partnerships, uncertainty of pledged funding by Member States and their source for co-funded and reporting confidentiality and validation of additional activities for co-programmed partnerships.

<sup>367</sup> See Section 4.2.3 and Annex 4 of the [Final Evaluation of Horizon 2020](#) (2023), [Assessment of the Lump Sum Pilot \(2018-2020\)](#), October 2021.

<sup>368</sup> A detailed description of the state-of-play of lump sum funding, covering the entire lifecycle of grants as of early 2024 can be found in: [Assessment of lump sum funding in Horizon 2020 and Horizon Europe](#), September 2024.



financial risk and amendments to grant agreements<sup>369</sup>. Extensive quantitative and qualitative evidence, allow to estimate the benefits from removing financial reporting costs achieved so far, analyse changes in application costs and to the EU public administration processes, as well as assess the existence of potential unintended side-effects.

A 2024 assessment<sup>370</sup> of targeted survey responses suggests that a large majority of beneficiaries of lump sum funding, across programme parts, perceived a **reduction in administrative burden** and an **improved focus on project content**<sup>371</sup>. Lump sum grants are **particularly welcomed by beneficiaries of grants of up to EUR 10 million and with a consortium size of up to 20 participants**<sup>372</sup>.

Implementation data suggest that lump sum grants **do not interfere with the proper functioning of R&I projects**. The rate of grant reduction in closed lump sum grants has stayed under 1%, irrespective of the budget size of the grant, indicating that **a beneficiary's risk of not completing a lump sum project remains low**.

The evaluation **quantified the simplification benefits of lump sum grants** from removing all financial reporting requirements. Two targeted surveys<sup>373</sup> returned very similar **median financial reporting cost savings of lump sum grant beneficiaries of between 6 and 8 person-days per reporting period and consortium member**<sup>374</sup>.

Given the characteristics of the lump sum grants signed so far, beneficiaries (excl. ERC PoC) are expected to **reduce the time spent on reporting** by between **96 and 128 person-days per grant over the project lifetime** (median saving). This corresponds to a typical simplification benefit of around **EUR 33 200 to EUR 44 200**<sup>375</sup> **per grant**, equivalent to around **1.4% to 1.8% of the grant value**, or between **12% to 27% of the beneficiaries' administrative cost**<sup>376</sup>.

The burden reduction per ERC **PoC mono-beneficiary** is estimated to amount to between **6 - 8 person-days**, or between **EUR 1 800 to EUR 2 500** (1.2%-1.6% of grant value; 12%-20% of administrative cost) over the project lifetime.

In addition, lump sum grant beneficiaries save the costs of a **certificate on the financial statements (CFS)** for EU contributions above EUR 430 000, which typically costs **EUR 4 500**, equivalent to around 0.3% of the grant value<sup>377</sup>.

At interim evaluation stage, adding up administrative time savings (reporting burden reduction) and avoided CFS certificates, and **only considering the grants (including ERC PoCs) that have been signed to date**, lump sum funding is estimated to so far have secured savings for

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<sup>369</sup> Concerns about unintended side-effects so far are not confirmed by implementation data. For assessment see Annex 4.4.2 (Costs and side-effects of lump sum funding).

<sup>370</sup> Assessment of lump sum funding in Horizon 2020 and Horizon Europe, September 2024. This assessment also addresses recommendation 5.1.a from the European Court of Auditors (ECA Annual Report 2022) to evaluate the use of lump sums, which the Commission committed to cover in the mid-term evaluation of Horizon Europe.

<sup>371</sup> See Annex 4.4.2, Figure 20: Overall satisfaction with lump sum funding.

<sup>372</sup> See Annex 4.4.2 for more findings and additional detail.

<sup>373</sup> Targeted surveys summer 2024. Please refer to Annex 4.4.2 for detailed reporting on surveys and results.

<sup>374</sup> 1 529 actual cost grant beneficiaries reported median financial reporting costs of 6 person-days per reporting period and consortium member. 210 lump sum grant beneficiaries, with past experience of actual cost grants, reported a median administrative cost saving of 8 person-days per reporting period and consortium member. The assessment uses the range of the two median values. Additional information in Annex 4.4.2.

<sup>375</sup> Monetisation uses a median personnel cost value, which is a sector-specific cost of labour of Horizon Europe beneficiaries, reflecting the opportunity cost of the project team's time that would have been spent on preparing financial reporting. For more information see Annex 4.4.2 (Quantitative assessment of lump sum benefits).

<sup>376</sup> Including Proof of Concept lump sum grants does not change the range of 12% - 27%.

<sup>377</sup> Based on 634 (non-zero) responses of actual cost grant beneficiaries. Percentage calculated based on the total grant value of all lump sum grants signed so far.

beneficiaries of between **EUR 49.8 million and EUR 63.4 million**<sup>378</sup> over their project lifetime. This sum is **equivalent to between 1.6% and 2.1% of the total grant value of lump sum grants so far and to between 14% and 30% of beneficiaries' total administrative costs**. These values do not yet include the savings of lump sum grants to be signed during the remaining years of Horizon Europe, which are discussed in Section 4.2.4.

Beneficiaries' survey responses suggest the overwhelming majority<sup>379</sup> of lump sum beneficiaries has discontinued at least some of the tasks, which means that that lump sum funding already contributes to a reduced administrative burden in practice. The full savings potential might take some time to materialise. Organisations may choose not to (fully) adapt their financial management practices, particularly in the short-term. However, regardless of the extent of their adaptation, the removal of the financial reporting requirements themselves is already a reduction of the administrative burden on beneficiaries generated by the programme as beneficiaries are no longer constrained and are free to organise themselves in the most efficient way.

All Horizon Europe applicants, regardless of funding model, must base their proposals on detailed cost estimates, which they are required to keep on file. Applicants for lump sum grants (excluding ERC PoC) must submit an **additional 'budget table'**. Compiling the budget information for the table is not an additional task but included in the baseline cost of applicants. What changes for lump sum proposals is that **applicants must enter and submit their figures into a specific template**, currently in the form of an excel spreadsheet, instead of keeping the information at hand in a format of their choice under actual cost grants. Survey responses of lump sum beneficiaries suggest that, so far, the additional application costs do not raise any concerns or are negligible. **The available quantitative and qualitative evidence**<sup>380</sup> **on lump sum applicants' proposal preparation costs so far gives no cause for concern about the size of this additional cost**.

The use of lump sum funding requires an adaptation of internal administrative processes in implementing bodies, such as executive agencies and joint undertakings, which alters the public sector's administrative costs, particularly in the short run. Financial reporting documents no longer have to be processed, which generates cost savings from simplification. At the same time, a greater emphasis is placed on the content of the supported projects, the additional 'budget tables' have to be assessed, some workflows of the implementing bodies have to be adjusted, and staff have to become familiar with changes to the implementation practices<sup>381</sup>.

### *Blind evaluation of proposals*

A 'blind evaluation' of proposals has the potential to improve the evaluation process by safeguarding it against the possible biases of the evaluating expert. As the evaluator does not receive information from which they can infer the identity of the applicants it supports an assessment, which is fair and based solely on the quality of the proposed project. While not a 'simplification' measure as such, the measure can contribute to a better functioning of the framework programme.

Following a request by Member States, blind evaluations were piloted in the evaluation process of proposals submitted in the first stage of 16 of the 17 two-stage calls of the 2023-2024 Horizon Europe work programme (with the exception of one 'widening' call). Extensive feedback

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<sup>378</sup> Of which administrative cost savings of EUR 1.3-1.7 million stem from PoC and EUR 33.8 million to EUR 45.0 million from other programme parts. The total saving from CFS amounts to around EUR 7.56 million, based on 1680 (1.12.2024) lump sum participations above EUR 430 000, who would have had to submit a CFS.

<sup>379</sup> Based on 89% (267) of LS respondents to a corresponding survey question, see Annex 4.4.2 for further detail.

<sup>380</sup> For more details on application cost see Annex 4.4.2 (Costs and side-effects of lump sum funding) and the [Assessment of lump sum funding in Horizon 2020 and Horizon Europe](#) (2024).

<sup>381</sup> See also Annex 4.4.2

collected as part of the pilot suggests that evaluators perceived no additional effort. Applicants spent some extra effort to anonymise their proposals<sup>382</sup> but viewed the measure as a general improvement. In particular, National Contact Points of widening and third countries welcomed the measure. The call coordinators, part of the EU public administration, reported an increase in the time they spent on ‘admissibility checks’<sup>383</sup> to make sure that applicants could not be identified in the proposals and voiced concerns about the additional workload<sup>384</sup>.

The pilot confirmed that the **blind evaluation of proposals is feasible within the legal framework and the operational context of the R&I framework programme**<sup>385</sup>. Although not set up as a policy experiment<sup>386</sup>, the pilot monitored indicators on geographical coverage and gender, before and after the first stage evaluation. It observed that the share of participations from ‘widening’ countries that passed the first stage evaluation decreased less in blind evaluations, namely by 3.3%, compared to a decline of 9.4% in standard, non-blind evaluations<sup>387</sup>. Differences between the gender composition of project coordinators (contact person) were also noted.

### *Ethics appraisal*

Horizon Europe adopted a reformed approach to the **ethics appraisal process**. The objective of the simplification is to substantially reduce the workload for the great majority of applicants and beneficiaries, whose projects involve neither serious nor complex ethics questions, while upholding compliance with fundamental ethics principles in research and innovation, which is a prerequisite for achieving excellence<sup>388</sup>.

The ethics appraisal process typically includes a self-assessment at the proposal stage by the applicants, followed by an ethics review procedure. There are then ethics checks, reviews and audits during implementation. Together these steps can generate a considerable workload<sup>389</sup> for the applicants and beneficiaries concerned, which is why they should only apply where the benefits of the process are likely to outweigh the burden. **The reformed ethics process therefore focuses the effort on projects involving serious or complex ethics issues**<sup>390</sup>. If any such issues are identified at an early screening stage, the proposal will be subject to a full ethics assessment. The assessment will then likely set out the ethics requirements for the project implementation phase. Monitoring data suggests that the measure has already had an effect<sup>391</sup>.

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<sup>382</sup> Depending on the cluster, between 50% and 60% of respondents reported ‘under 10% extra effort’ or ‘no extra effort’, with 30% to 40% indicating ‘10% - 50% extra effort’, and 10% to 15% experiencing ‘over 50% extra effort’ or ‘double the workload’. The survey question did not clarify the point of comparison (‘extra’ to what).

<sup>383</sup> Some of the responding call coordinators reported in 2024, spending ‘roughly three times longer’ on ‘admissibility checks’.

<sup>384</sup> The pilot did not collect quantitative evidence on the workload or timing of the public administration. Targets (time-to-inform, time-to-grant), as for all two-stages calls, remained applicable.

<sup>385</sup> The pilot did not assess whether the blind evaluation affected subsequent funding decisions.

<sup>386</sup> For legal reasons it was not possible to partially (incl. randomly) allocate the use of blind evaluations to applicants within the same call topic. The observed differences in characteristics, between blind and non-blind evaluations, may therefore not have been caused by the use of blind evaluations. See also Annex 4.4.3.

<sup>387</sup> Blind evaluation: from 21.2% to 20.5%; Non-blind evaluation from 19.1% to 17.3%.

<sup>388</sup> COM(2021) 407 final. Proposal for a Council Recommendation on a Pact for Research and Innovation in Europe.

<sup>389</sup> An estimate of the burden is not available due to lack of quantitative evidence.

<sup>390</sup> For a detailed description of the new elements involved, see Annex 4.4.4

<sup>391</sup> Attribution to the simplification measure cannot be demonstrated but is considered likely. No other changes to the programme could be identified that would have substantially altered the composition of proposals with respect to their relevance for the ethics assessment during the relevant period.

**Of the projects that received Horizon Europe funding so far 90% and that underwent an ethics assessment<sup>392</sup>(14 969), 90.6% have been cleared without any further conditions or requirements linked to ethics,** compared with 44% under Horizon 2020. Conversely, 9.4% (1 406) have been given specific ethics conditions, while this applied to 55% of proposals under Horizon 2020. Under the assumption that the ethical complexity of the proposed projects has stayed constant between the programmes, the new approach has led to simplification for 46% of the submitted proposals.

Beneficiaries are generally satisfied with the new ethics self-assessment, with over 60% (419) reporting that their experience with it was positive ‘at least to a moderate extent’<sup>393</sup>. Ethics and integrity were considered important topics by public consultation respondents<sup>394</sup>.

The ethics process relies on institutional, local and national/regional mechanisms for oversight of research, in line with Article 19<sup>395</sup>. However, it is not possible to assess the quality of the ethics appraisals as they are not monitored. No increase of relevant incidents has come to the attention of the Commission.

#### 4.2.4 Potential areas for further simplification

Qualitative evidence and feedback collected from stakeholders<sup>396</sup> suggests there has been no substantial change in the level of the administrative burden at project implementation stage between Horizon 2020 and Horizon Europe. The **project implementation phase** remains an area of focus for **simplification measures**, which reduce beneficiaries’ costs without negatively affecting the projects’ R&I impact. Horizon Europe beneficiaries responded to open questions in the targeted survey and provided **specific feedback or suggestions** on related topics. 40 specific suggestions were received, including on: single personnel rate for SMEs, timesheets, helpdesk for administrative procedures, MSCA PF manual, and the on-boarding of new grantees<sup>397</sup>.

##### *Lump sum funding*

The main simplification potential targeting the administrative burden at project implementation stage is expected to come from lump sum funding. The use of lump sum grants is scheduled to broaden and pick up speed in the coming years, aiming to cover **half of the annual call budget by 2027**. In tandem, the simplification benefits from lump sum funding under Horizon Europe are expected to increase substantially. **The potential for future simplification from lump sum funding** in the remaining years of Horizon Europe is expected to **add between EUR 276 million and EUR 351 million** in reporting burden reduction<sup>398</sup>.

##### *Personnel unit costs*

Since May 2024, ‘**Personnel unit costs**’ have been introduced as an additional simplification measure available for Horizon Europe beneficiaries. This **new, optional method** enables

<sup>392</sup> Cut-off date for Dashboard data 6 January 2025. The ensuing calculations exclude project numbers without an ethics assessment, such as top-ups, Hop On Facility, framework partnership agreements, prizes, EIT KICs umbrella projects, and one Common Support Action. Additionally, the calculations exclude projects whose ethics review status is ‘pending’ (831). If these were to be taken into account, projects cleared without conditions would be 85.8% of the total signed and closed projects, projects conditionally cleared would be 8.9%, and the remaining 5.3% would be projects with pending outcome.

<sup>393</sup> Evaluation support study on Digital & Industrial, page 531. More details on responses in Annex 4.4.4.

<sup>394</sup> European Commission (2024). Synopsis Report, page 37, see also Annex 4.4.4.

<sup>395</sup> Regulation (EU) 2021/695.

<sup>396</sup> Public consultation, related event, position papers, qualitative evidence from the targeted survey, including responses to the open question.

<sup>397</sup> See Annex 4.3.4.

<sup>398</sup> Lump sum grants signed so far may not be representative of those expected to be signed under Horizon Europe overall. The estimate assumes a constant average ratio of lump sum benefits to grant value. The proportion of small grants will likely decrease, and the ratio will change. The total benefit is an order-of-magnitude-figure estimate, which combines assumptions about future uptake and past experience and evidence.



participants to calculate and report personnel costs using a **single daily rate that applies to all staff** and that is agreed upfront for all of the beneficiary's future grants. Once projects are running, beneficiaries only report the total number of person-days worked during a reporting period. This **removes the burden on beneficiaries to calculate personnel costs per staff member**, which is estimated to typically take **about 2 person-days per consortium member and per reporting period**<sup>399</sup> in actual cost grants. For instance, an actual cost grant with 3 partners and 3 reporting periods is expected to benefit from savings of 18 person-days<sup>400</sup>. This suggests that the personnel unit cost method could tangibly reduce the reporting burden on beneficiaries. The interim evaluation has no evidence base to estimate the measure's expected voluntary uptake in the coming years, which would drive any estimation of the overall simplification effect. The **future monitoring of uptake and collection of feedback from beneficiaries is essential** to support an assessment of the measure and its potential in the final evaluation of Horizon Europe.

#### *Application stage and proposal evaluation process*

As reported in section 4.2.1, there has been no substantial change in the level of the application costs since Horizon 2020 and for many applicants the costs are not proportionate to their chances of securing Horizon Europe funding. The evaluation therefore confirms the finding of the Horizon 2020 final evaluation that any improvement with a potential to reduce the effort and cost required by applicants, in particular unsuccessful applicants, has a potential to increase the programme's efficiency.

Horizon Europe applicants responding to the survey's open question point out areas for improvement and make a number of concrete suggestions for simplification. For the **application stage** these centre on the topics: finding the right call, proposal templates, application guidance, internet interface/web portals, and the use of consultants. While qualitative evidence points at an **overall appreciation** of the evaluation process and of the quality of the evaluation, **evaluators and the evaluation process** were another focus of concerns (triggering 2007 comments alone). Topics included: quality of expert evaluators, level of detail of evaluation reports, scoring of resubmitted proposals, grant agreement platform, experiences with Seal of Excellence, and suggestions for the use of two-stage evaluations and partial randomisation (lottery) in proposal evaluation.<sup>401</sup>

While the survey's open questions can only collect anecdotal evidence, which is not representative, the contributions can provide first-hand insights into potentially highly relevant areas that should be included in any considerations on future simplification.

#### 4.2.5 Monitoring and reporting

At the time of this evaluation, the Commission has not yet fully implemented the Horizon Europe Regulation. A single database – the Common Research Data Warehouse (CORDA)<sup>402</sup> – does exist and includes implementation data for all parts of the programme<sup>403</sup>, covering both the proposal and project implementation (and reporting) stages. A curated version of CORDA can be accessed publicly through the interactive Horizon Dashboard<sup>404</sup>. Specific procedures are in

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<sup>399</sup> Median value of 1307 targeted survey responses of actual cost grant beneficiaries with experience in reporting.

<sup>400</sup> Applying the labour cost in the EU's R&I sector this translates into a saving of EUR 4500 per such project.

<sup>401</sup> For details see Annex 4.3.4 and 4.3.5.

<sup>402</sup> CORDA is a part of the wider eGrants database, which includes implementation data for most direct management programmes implemented by the European Commission and its agencies.

<sup>403</sup> European Partnerships, Missions, ERC, EIC and EIT are singled out by the legal basis.

<sup>404</sup> [Horizon Dashboard](#)



place to ensure lawful access to a restricted population of users appointed by National Authorities.

Nonetheless, the central database remains incomplete in several aspects as described below.

1. Key Impact Pathway (KIP) indicators: during the first quarter of 2025, short-term indicators are to be made available publicly in a KIP Dashboard. Selected parts of the short-term KIP indicators are presented annually in the Programme Performance Statement<sup>405</sup>. Medium- and longer-term indicators are being operationalised, but their implementation is lagging due to CORDA data integration delays for some programme parts and the complexity of the indicator framework.
2. EIC Accelerator: at the time of this evaluation, approximately 3 900 proposals received in EIC Accelerator calls (both open and thematic) do not appear correctly in central monitoring systems. These are distinct between proposals that are not published in the Horizon Dashboard (due to missing data or inadequate disclosure rules)<sup>406</sup> and applications that are missing from central databases altogether. The CORDA database does also not include information on the resubmission of proposals. This means that if the same proposal is submitted multiple times, only its latest version is counted. If no corrective measures are taken, this unusual arrangement artificially inflates success rates and share of high-quality proposals for the Accelerator – and therefore for the entire programme. **For this reason, this evaluation does not publish any application figures for the EIC Accelerator.** Moreover, public monitoring tools do not currently include any implementation figures for the EIC Fund, which are only currently available to Member State representatives. Due to their different source and their data taxonomy not fully aligned with other Horizon Europe projects, EIC Fund statistics are always shown separately in this document.
3. European Partnerships: for several types of partnerships partial or full implementation figures are not yet available. Call activities for EIT KICs, Article 185 TFEU initiatives, and co-funded partnerships are fully or partly managed outside Commission grant management tools. As a result, their integration in the central systems takes place periodically and is incomplete to date. In addition, there is no system in dashboards for distinguishing ‘cascading grants’ (from the partnership to its beneficiaries) from the ‘first-level’ grants from the Commission to the bodies implementing the partnership<sup>407</sup>.

The CORDA database includes information enabling the analysis of most of the areas listed in the monitoring provision of the Horizon Europe Regulation<sup>408</sup>. There are still a few aspects where integration of data into CORDA has not been implemented, which prevents public access through

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<sup>405</sup> [Horizon Europe - Performance](#)

<sup>406</sup> These are specifically proposals that have been rejected, but that are still eligible for resubmission. In the EIC Accelerator, uniquely in the programme, resubmitted proposals receive the same unique identifier as the first submission. These proposals are not published in dashboards as they are not considered fully evaluated, even if they effectively went through at least one full evaluation. This same feature also means that success rates can be counted either by the number of distinct resubmissions or by the number of distinct proposal numbers. The second ratio, which is used for the rest of the programme, will always be the highest. For details on the proposal submission system of the EIC Accelerator and associated methodological issues, see p. 14 on the Commission monitoring report ‘SME participation in Horizon Europe’, 2024. <https://data.europa.eu/doi/10.2777/576670>.

<sup>407</sup> While the issues described do not apply to JUs and co-programmed partnerships – which are all managed through Commission corporate tools – the visibility of partnership data is limited as there is no simple method (e.g. a single filter or a dedicated field in the dashboards) to identify all proposals and grants that are under European partnerships.

<sup>408</sup> The full list in Article 50 point (b) includes: SSH, the ratio between lower and higher TRLs, participation of widening countries, geographical composition of consortia, researchers’ salaries, use of the two-stage procedure, the measures aimed at facilitating collaborative links, the use of the evaluation review and the number and types of complaints, climate mainstreaming expenditure, SME participation, private sector participation, gender participation, the Seals of Excellence, European partnerships and funding from other EU programmes, research infrastructures, time-to-grant, international cooperation, engagement of citizens and civil society.

the dashboard: (i) ‘Seals of Excellence’, for which the full figures for the EIC Accelerator are not yet in the central database; (ii) trends in researchers’ salaries<sup>409</sup>; (iii) (gender) participation in boards and advisory groups; and (iv) complementary and cumulative funding from other EU programmes.

The Commission's services responsible for data management have been working on finalising data integration in the central monitoring system, for instance by creating templates for reporting of implementation data and project outputs in ‘cascading grants’. The complexity of the task, particularly when it needs coordination with delegated bodies, has significantly slowed down progress. This evaluation however has not found any provisions in the legal basis that have proved technically impossible to implement.

The time lags are another limitation affecting the relevance and interpretability of figures released by the Commission. Call results are not made public when they become available. The Commission only publishes results for calls that have been fully evaluated and that comply with a set of disclosure rules. The list of calls that are not yet included in the database is not made public, although their results may already be available through different sources (e.g. press releases from implementing bodies).

On IPR, business factors also come into play, e.g. companies choosing secrecy over IPR to protect their innovations. Moreover, it is estimated that over half of patent applications reported by Horizon beneficiaries are confidential (cfr. Section 4.1.3), thus lacking the metadata needed to count them as part of the Key Impact Pathway reporting system.

## 4.3 Coherence

### 4.3.1. Internal coherence

The interim and *ex post* evaluations of Horizon 2020 judged the number of instruments excessive, making ‘the landscape for EU R&I support difficult to navigate and potentially leading to less coherent interventions’<sup>410</sup>. In Horizon Europe, several changes were made to respond to this: (i) the pillar structure was redesigned<sup>411</sup>; (ii) the partnership landscape was rationalised; and (iii) the portfolio approach was introduced to the EU Missions and the EIC. These changes led to the programme structure outlined in Figure 13.

<sup>409</sup> A joint OECD-Commission survey, part of the ReICO initiative, will fill this gap from 2026 onwards. More information: <https://ec.europa.eu/era-talent-platform/reico/>

<sup>410</sup> SWD (2024)29 final, p. 74. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=SWD:2024:29:FIN>

<sup>411</sup> SWD(2018)307final - 1/3, p. 21. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52018SC0307>  
Horizon Europe includes an innovation-focused pillar to support breakthrough market-creating innovations and integrates key enabling technologies. The redesigned pillar structure was set to improve coherence by integrating industrial technologies in Pillar II, rationalising societal challenges into five cross-theme clusters that cover the whole innovation chain and encourage transdisciplinary activities, including SSH; streamlining different innovation support instruments through the EIC; linking the EIC to the ERC, MSCA and the EIT KICs.

Figure 13: Overview of Horizon Europe types of action and their characteristics

| HORIZON EUROPE'S INTERNAL COHERENCE                                    |   |             |              |   |          |                                 |           |      |               |   |                             |   |
|--|---|-------------|--------------|---|----------|---------------------------------|-----------|------|---------------|---|-----------------------------|---|
|  |   | BUDGET      | TRLs COVERED | TYPE OF ACTION                              | APPROACH | COLLABORATION                   | Start-ups | SMEs | BENEFICIARIES |   | Nation/Regional authorities |   |
| PILLAR I<br>Excellent Science  | European Research Council                       | 5.66 B      | 1-2 & 3-4    | ERC Actions                                 | ⬆️⬆️⬆️   | 👤                               | ●         | ●    | ●             | ● | ●                           |   |
|  | Marie Skłodowska-Curie                          | 1.67 B      | 1-4          | TMA   | ⬆️⬆️⬆️   | 👤                               | ●         | ●    | ●             | ● | ●                           |   |
|  | Research Infrastructures                        | 935.3 M     | 2-6          | RIA   CSA COFUND                            | ⬆️⬆️⬆️   | 🌐                               | ●         | ●    | ●             | ● | ●                           |   |
| PILLAR II<br>Global Challenges and European industrial competitiveness | CLUSTERS 1-6                                    | 19.72 B     | 2-8          | RIA   IA   CSA COFUND<br>Procurement Prizes | ⬇️⬇️⬇️   | 🌐                               | ●         | ●    | ●             | ● | ●                           |   |
| PILLAR III<br>Innovative Europe  | European Innovation Council                     | Pathfinder  | 882 M        | 1-4   | Prizes   | Grants<br>⬆️ Challenges Open ⬆️ | 🌐         | ●    | ●             | ● | ●                           | ● |
|  |   | Transition  | 314.5 M      | 3-6   |          | Grants<br>⬆️ Challenges Open ⬆️ | 🌐         | ●    | ●             | ● | ●                           | ● |
|  |   | Accelerator | 1.1 B        | 5-9   |          | IMDA<br>⬆️⬆️⬆️                  | 👤         | ●    | ●             | ● | ●                           | ● |
|  | European Institute of Innovation and Technology | 945.6 M     | 1-9          | EIT-KIC                                     | ⬆️⬆️⬆️   | 👤🌐                              | ●         | ●    | ●             | ● | ●                           |   |
|  | European innovation ecosystems                  | 372.3 M     | 1-9          | CSA   RIA COFUND                            | ⬆️⬆️⬆️   | 🌐                               | ●         | ●    | ●             | ● | ●                           |   |
| WIDERA<br>Widening participation and spreading excellence              | Cross-Pillars                                   | 1,05 B      | 1-9          | CSA, RIA, TMA                               | ⬇️⬇️⬇️   | 🌐                               | ●         | ●    | ●             | ● | ●                           |   |

ERC Actions: Actions of the European Research Council

TMA: Training and Mobility Action

RIA: Research and Innovation Actions

CSA: Coordination and Support Actions(CSAs)

IA: Innovation Actions

IMDA: Innovation and market deployment Actions

EIT-KIC: European Institute of Innovation and Technology - Knowledge and Innovation Community

⬆️ TOP-DOWN APPROACH

⬆️⬆️ BOTTOM-UP APPROACH

⬆️⬆️⬆️ BOTH APPROACHES

👤 SINGLE BENEFICIARY

🌐 COLLABORATIVE PROJECT

👤🌐 BOTH

Source: Horizon Europe external evaluation studies. Budget data from Horizon Europe Dashboard 7 June 2024

However, the targeted survey showed that participants are not fully aware of opportunities for exploring the links and between the different programme's parts and discovering how they complement each other. Over 70% of the 5 970 beneficiaries who responded indicated that they either do not plan any joint activities or are unable to answer. The lowest number of collaborations are planned with Pillar III (less than 1% of respondents).

The external evaluation studies found a number of factors described below that are hindering internal coherence.

- Challenges hindering internal coherence in a number of clusters include the fragmentation of information, the complexity of putting cross-pillar bridges into practice and the identification of key results<sup>412</sup>.
  - For instance, the use of emerging technologies, such as AI tools, in the research process of Horizon-funded projects has been increasing as 12-17% of Horizon Europe projects use or develop AI across all clusters and pillars (including with funding from bottom-up instruments, such as the ERC or with start-up support from the EIC)<sup>413</sup>.
  - A gap in portfolio management was also identified: for instance, potentially relevant MSCA networks or EIC projects are not considered systematically by project officers

<sup>412</sup> Digital and Industrial Transition study, 2024, Executive summary. <https://data.europa.eu/doi/10.2777/300334>

<sup>413</sup> Digital and Industrial Transition study, 2024, case study 12. <https://data.europa.eu/doi/10.2777/489648>

in executive agencies when organising thematic workshops for their project portfolios<sup>414</sup>.

- Joint activities between Missions and European Partnerships are rare<sup>415</sup>. A good example is the joint call between the Cities Mission and the Towards Zero-Emission Road Transport (2Zero) partnerships and the Connected, Cooperative and Automated Mobility (CCAM) partnership in 2023. Similarly, the Innovative Health Initiative (IHI) JU has topics directly contributing to the Cancer Mission, while Europe's Rail JU has a pilot project supporting the Mission for Climate-Neutral and Smart Cities, focusing on a new railway station concept<sup>416</sup>. In spite of these examples, the Missions' reliance on the same types of projects (e.g. RIA, IA, CSA) as other parts of Horizon Europe limits their distinctiveness.
- Under Pillar III, there is overlap between some of the instruments in terms of the type of support provided, the TRL levels covered, and the groups targeted<sup>417</sup>. This overlap is mitigated by the instruments' specific characteristics (see Figure 14), but only to a certain extent.
- There is an overlap between the EIT and the EIE which both lay the groundwork for a pan-European innovation ecosystem connecting regional innovation ecosystems across the EU. The EIT brings together higher education institutions, research organisations and businesses (the knowledge triangle) around specific sectors, and the EIE involves a broader group of stakeholders across the quadruple helix<sup>418</sup>. However, a lack of distinctive features between the two instruments has been highlighted<sup>419</sup>.
- Stakeholders from academia raised concerns about the design and implementation of the WIDERA programme. They highlighted the complexity of the work programmes, which address both the widening and strengthening components for ERA<sup>420</sup>.

Nevertheless, as one of the more recent instruments, the EIC is taking measures to connect to other parts of the programme.

- Following the introduction of the EIC Transition scheme in Horizon Europe, there is now funding that targets innovation activities that go beyond the experimental proof of principle in a laboratory. This helps mature and validate novel technologies from the lab to the application environments, which initially included beneficiaries of ERC PoC support. In 2024, eligibility was further extended to include **former recipients of Horizon Europe and Horizon 2020 funding for collaborative projects**.
- ERC PoC project beneficiaries are among those who can draw on this new funding stream. **Nearly half the EIC Transition grants have been awarded to beneficiaries of PoCs.**

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<sup>414</sup> Green Transition evaluation study, 2024, Chapter 3.4.1.2. <https://data.europa.eu/doi/10.2777/67934>.

<sup>415</sup> Ibid, Chapter 3.5.2.

<sup>416</sup> New railway station concept for green and socially inclusive smart cities. [EU Funding & Tenders Portal](https://data.europa.eu/doi/10.2777/499132)

<sup>417</sup> Innovative Europe evaluation study, 2024, Chapters 7.1 and 9.4. <https://data.europa.eu/doi/10.2777/499132>.

<sup>418</sup> The “quadruple helix” model in the context of innovation refers to a framework that emphasises the collaboration and multi-directional interactions among the government, industry, academia, and civil society.

<sup>419</sup> See the EIE and EIT beneficiaries in the Figure 14 - Overview of Horizon Europe types of action. They both facilitate interaction among innovation players and cultivate a conducive environment for innovation to thrive. They also both have a regional dimension: the EIT has a solid geographic coverage through the EIT KICs co-location centres or regional hubs, and the EIE focuses on building European, national, regional, and local networks across the EU and associated countries, particularly through Regional Innovation Valleys. As part of the EIE, the Commission launched several calls for proposals with an interregional dimension - closely linked to the EIT Regional Innovation Scheme that develops innovation ecosystems in low-innovation performance regions and links them to local and regional smart specialisation strategies. Innovative Europe evaluation study, 2024, p. 81.

<sup>420</sup> Excellent Science evaluation study, 2024, Section 1.6.2.2. <https://data.europa.eu/doi/10.2777/2295765>



- From 2024, EIC Transition grants are also **open to former recipients of Horizon Europe and Horizon 2020 funding for collaborative projects**<sup>421</sup>.
- There is also a **Fast Track approach for EIT companies** into the Accelerator that skips the first stage of the evaluation, but only five companies have benefited from this approach so far. Out of all 550 EIC Accelerator beneficiaries (not only those arriving via the fast track), as of May 2024, 140 companies supported by EIT KICs went on to win EIC funding.
- A similar **fast track was launched in 2023 for beneficiaries of national programmes**, and there have been 13 beneficiaries to date.

*ERC Proof of Concept, EIC Transition and MSCA beneficiary wins the 2023 Nobel Prize in physics*

Prof. Anne L'Huillier from Lund University is a former MSCA and ERC beneficiary. Dr L'Huillier supervised numerous MSCA postdoctoral researchers and coordinated several MSCA projects over the past two decades in the field of attosecond science and was the coordinator of an ERC Proof of Concept (PoC) project afterwards. This PoC grant has made the project eligible to apply for an EIC Transition scheme and her team was awarded the grant for the project called 'Single-shot, ultrashort laser pulse characterisation based on the dispersion scan technique' (101058075).

Prof. L'Huillier won the 2023 Nobel Prize in physics for 'for experimental methods that generate attosecond pulses of light for the study of electron dynamics in matter'<sup>422</sup>.

While the general scope of the memorandum of understanding (MoU) on EIC-EIT cooperation remains relevant, progress has been uneven<sup>423</sup>. Cooperation between the EIC and the EIT KICs is still challenging because of their separate and different structural and governing models, the absence of a complete common strategy and stability, limitation in terms of human resources, and challenges in practically implementing the Fast Track scheme.

### *Technology readiness levels (TRLs)*

**Technology readiness levels (TRLs)** are at times used to check the framework programme's internal coherence. In Horizon 2020, there were no legal requirements for TRL coverage, but it was the first framework programme to introduce a reference to the TRL classification in its calls. The Horizon Europe regulation lays down that the collaborative parts of the programme as a whole should ensure a **balance between lower and higher TRLs**<sup>424</sup>, that Missions<sup>425</sup> and that Pillar II should cover activities from a broad range of TRLs, also including lower TRLs<sup>426</sup>.

The external evaluations collected different views described below:

- On the positive side, interviewees reported that the TRL concept helps applicants focus on technology progression for calls within Pillar II (Cluster 1)<sup>427</sup>.
- Cluster 3 interviewees highlighted that setting high TRLs as a target for calls strengthened stakeholder engagement as it requires user involvement in testing and demonstration activities that take place in a relevant or operational environment<sup>428</sup>.
- On the negative side, Cluster 4 interviewees reported that the programme's potential is hindered by a gap in financing collaborative research at lower TRL levels. It is also difficult

<sup>421</sup> EIC work programme 2024. [https://eic.ec.europa.eu/eic-2024-work-programme\\_en](https://eic.ec.europa.eu/eic-2024-work-programme_en). Previously, the grants were only open to previous recipients of ERC Proof of Concept, EIC Pathfinder and European Defence Fund. In addition, the EIC work programme 2025 opens eligibility of Transition to projects from JUs.

<sup>422</sup> Innovative Europe evaluation study, 2024, p. 76. <https://data.europa.eu/doi/10.2777/499132>.

<sup>423</sup> Innovative Europe evaluation study, 2024, Chapter 7.1. <https://data.europa.eu/doi/10.2777/499132>.

<sup>424</sup> Article 7 (3) of Regulation (EU) 2021/695 establishing Horizon Europe. In addition, Article 50 (1) states that monitoring and reporting should also encompass the ratio between lower and higher TRLs in collaborative research.

<sup>425</sup> Article 8 of Regulation (EU) 2021/695 establishing Horizon Europe. <https://eur-lex.europa.eu/eli/reg/2021/695/oj>

<sup>426</sup> Ibid., Annex I.

<sup>427</sup> Resilient Europe evaluation study, 2024, Section 5.2. <https://data.europa.eu/doi/10.2777/797281>.

<sup>428</sup> Ibid, section 4.1.

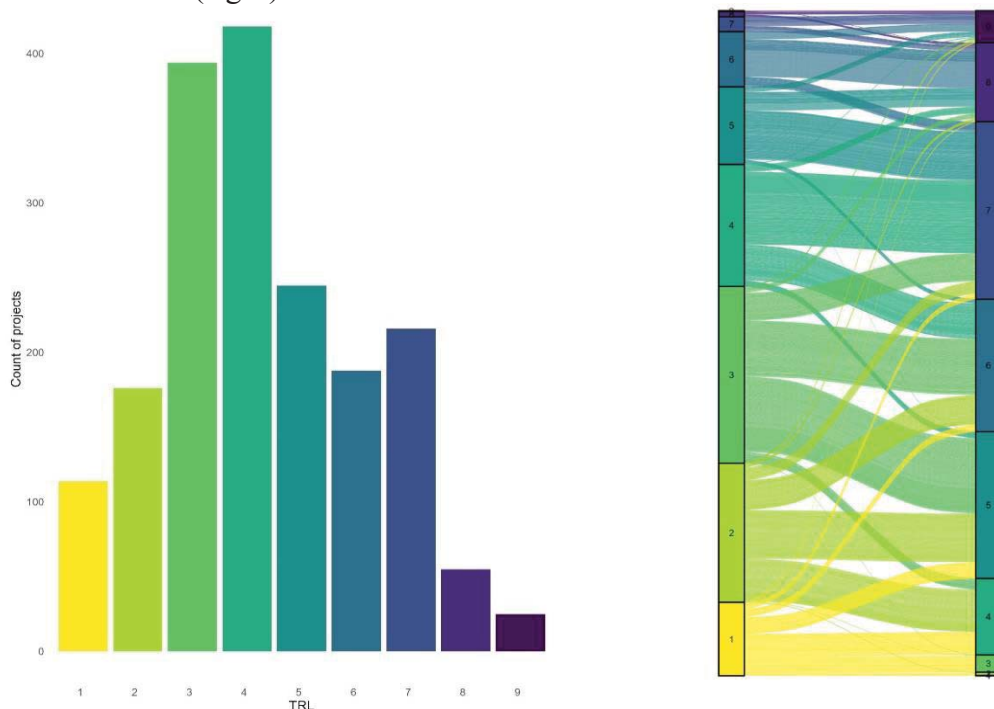


to ensure continuity between RIAs and IAs (around TRL 4-5). The interviewees noted the slow maturation of RIA results towards deployment, a fragmentation in research approaches and a lack of coordination between projects. This continuity is particularly important in fast-evolving areas (e.g. AI, data and robotics, advanced computing).<sup>429</sup>

- In Clusters 5 and 6, interviewees warned that the shift to higher TRL funding discouraged universities from participating<sup>430</sup>.
- The focus on innovation in European Partnerships may be associated with research gaps for lower TRLs. This can lead to a weakened scientific and technological base in the medium term as many solutions for climate neutrality have not been developed yet<sup>431</sup>.

In Horizon Europe, some beneficiaries have reported for the first time on the TRL of their projects: by the time this analysis was conducted, TRL information was available for 1 807 projects (12% of all projects)<sup>432</sup>. Figure 15 shows the current TRL of projects as reported by beneficiaries, as well as the levels at the beginning and planned (or already achieved) end-TRLs. Out of the 1807 projects for which TRL at project start and project end is consistently available, nearly half (48%) record an increase of at least three levels (actual or expected), and 88% reported an increase of at least two levels. For TRL data by pillar, see figures 120-123 in Annex 8.

Figure 14: Current TRL of Horizon Europe projects (left), as well as the levels at the project beginning and expected/achieved at the end, taking into consideration the size of EU contributions (right)



Source: DG RTD elaboration based on Dashboard, 6 January 2025 and Corda, 20 January 2025.

More than half of Horizon Europe project beneficiaries (66%) who responded to the evaluation survey perceived the TRL scale as an adequate measure for capturing market maturity.

<sup>429</sup> Digital & Industrial Transition, 2024, executive summary p. 10, p. 90. <https://data.europa.eu/doi/10.2777/300334>

<sup>430</sup> Green Transition evaluation study, 2024, section 14.2.5. <https://data.europa.eu/doi/10.2777/67934>.

<sup>431</sup> Ibid., section 13.4.1.1.

<sup>432</sup> This includes projects that reported TRL at the start of the project and the expected or achieved TRL at project end. TRL data is sourced from Periodic Reporting: this means that only projects that have been running for around 12-18 months can have valid TRL data. The time of publication of Periodic Reporting varies project by project. Additionally, TRL information is supplied on a voluntary basis so not all projects report TRL data consistently.

Respondents who did not agree with that statement<sup>433</sup> specifically mentioned the fields of pure mathematics and fundamental research projects, as well as SSH-related projects and those focusing on policy-making and social innovation. This sceptical view was also supported by stakeholders participating in the public event for the interim evaluation of Horizon Europe, which was held in June 2023.

### *New programme governance*

Horizon Europe introduced a new approach to programming through co-creation and co-design, involving relevant Directorate-Generals (DGs), Member States and stakeholders in strategic planning and topic drafting, focusing on outcomes to be achieved. The external evaluation studies report that this approach has improved the programme's coherence. Topics drafted with strong outcome statements for cluster 6 are considered easier to understand and selected projects under these topics engage a higher share of users (the stakeholders mentioned in the topic).<sup>434</sup>

To support the complex societal transition processes, the design of the work programme is now done in a more collaborative way. It involves all Commission departments with an interest in the Cluster/Destination on a level playing field, with a common budget envelope, and a steering board composed of Directors General and a Directors' Group for each programme part. Previously, topics were independently managed by a single DG, sometimes in isolation<sup>435</sup>.

Horizon Europe was designed to create synergies across EU funding programmes<sup>436</sup>. However, as seen in the assessment of internal coherence above, the full potential of synergies anticipated by the legislators has not been achieved so far.

The 2024 report on 'The future of European competitiveness' found that determination processes for priorities and budget allocation are overly complex<sup>437</sup>. The programme involves a wide range of Commission departments, Member States and the European Parliament through complex governance arrangements. One of the objectives of the strategic plan was to promote consistency between the work programmes, EU priorities and national priorities, as there is no formal mechanism that aligns EU and national R&I spending priorities, given that R&I are a national competence and thus not subject to EU-level decision-making.

#### *What messages emerged from the stakeholder consultation?*

Among all respondents, 76% (1 200) found that the introduction of the **co-creation process** with the relevant Commission departments **contributed either somewhat or to a great extent to strengthening the impact of European research and innovation**. In particular, NGOs (42%; 28), companies (39%; 106) and citizens (38%; 86) believed that it helped to a great extent. At the same time, public authorities were less convinced: only 33% (28) indicated that it helped to a great extent.

### *4.3.2. External coherence and synergies*

#### *Synergies between Horizon Europe and other EU programmes*

In Horizon Europe, the strategic planning and work programming processes – co-created with other EU programmes and policies and Commission departments – identify and target initiatives for integrating EU funding for research and innovation into other instruments and programmes.

<sup>433</sup> 4%; 225 (N= 5 305)

<sup>434</sup> The data refer to Cluster 6 in comparison to other clusters and H2020 Green Transition evaluation study, 2024, chapter 12.1.1.1. <https://data.europa.eu/doi/10.2777/67934>.

<sup>435</sup> Green Transition evaluation study, 2024, Chapter 12.1.1. <https://data.europa.eu/doi/10.2777/67934>.

<sup>436</sup> Primarily those listed in annex IV of its regulation.

<sup>437</sup> Draghi, M., "The future of European competitiveness – In-depth analysis and recommendations", 2024, p. 237.

The Horizon Europe Regulation describes **desirable synergies with 20 EU programmes<sup>438</sup> - up from 13 that were assessed in Horizon 2020's *ex post* evaluation**. The Commission also adopted a guidance notice on new opportunities to maximise the synergies between Horizon Europe and the European Regional Development Fund (ERDF)<sup>439</sup>. The evaluation treats these documents as objectives/targets in the field of synergies and assesses progress in their implementation (with details in Annex 6).

External evaluation support studies<sup>440</sup> found evidence of synergies with 18 programmes out of the 20 identified in the regulation – to a varying extent. Based on interviews, financial data and text analysis<sup>441</sup>, **the strongest synergies were identified with the LIFE programme, Erasmus+ and the Digital Europe programme, while the weakest evidence concerns synergies with the Common Agricultural Policy (with the exception of Cluster 6), the Creative Europe programme and InvestEU**. The evaluation did not find evidence of synergies with the Instrument for Pre-Accession Assistance or the Just Transition Mechanism.

**Despite Commission efforts to create synergies (described in Annex 6), 64% of beneficiaries surveyed reported that they had not sought additional funding for their research projects<sup>442</sup>**. Excluding the 10% of respondents who were unable to answer this question<sup>443</sup>, where additional funding *was* sought (1 623 respondents or 26%) - it was primarily under national or regional funding schemes. Among unsuccessful applicants, 29% of survey respondents (2 587) applied for alternative sources of funding. Over half of the beneficiaries also stated that the project they were working on was not a continuation of previous or other funding schemes (reaching as high as 60% of respondents in Pillars I and III<sup>444</sup>).

There is more information available on the Commission departments' *mechanisms* for creating synergies than data on the *results* of synergies, such as the deployment of specific Horizon Europe outputs through other EU programmes (which is an expected synergy for 11 of the 20 programmes listed in the regulation)<sup>445</sup>. The availability of data also varies depending on the programme's management mode (directly managed by the Commission or Executive Agencies, in shared management with Member States or indirect management by financial institutions). However, regardless of the management mode, there is no systematic, continuous monitoring of synergies.

### *Seal of Excellence as an instrument of synergy*

The Seal of Excellence (SoE) quality label was awarded to 7 166 high quality proposals that could not be funded due to budget limitations between 2021 and 2024. The largest proportion

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<sup>438</sup> In Annex IV of Regulation (EU) 2021/695. <https://eur-lex.europa.eu/legal-content/EN/TXT/HTML/?uri=CELEX:32021R0695&from=EN#d1e32-60-1>.

<sup>439</sup> C(2022) 4747 final. [https://research-and-innovation.ec.europa.eu/system/files/2022-07/c\\_2022\\_4747\\_1\\_en\\_annex.pdf](https://research-and-innovation.ec.europa.eu/system/files/2022-07/c_2022_4747_1_en_annex.pdf).

<sup>440</sup> On Excellent Science: <https://data.europa.eu/doi/10.2777/2295765>, Resilient Europe: <https://data.europa.eu/doi/10.2777/797281>, Digital & Industrial Transition: <https://data.europa.eu/doi/10.2777/845650>, Green Transition: <https://data.europa.eu/doi/10.2777/67934>, Innovative Europe: <https://data.europa.eu/doi/10.2777/499132>, all published in 2024.

<sup>441</sup> Catalano G., Consiglio, G. and Delponte L. *Horizon Europe Internal and External Coherence (Synergies): Supporting the Interim Evaluation of Horizon Europe*. Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/5616419>

<sup>442</sup> 4 045 out of 6 280 respondents.

<sup>443</sup> 612 out of 6 280 respondents.

<sup>444</sup> Survey of beneficiaries, May-July 2023. Respondents: Pillar I: 1859, Pillar II: 3725, Pillar III: 383, WIDERA; 313.

<sup>445</sup> DEP, CEF, LIFE, ISF, JTM, RFF, CAP (and the EAFRD), EMFAF, EU4Health, ERDF and ESF+ (Annex IV to Horizon Europe Regulation).

was awarded to researchers who applied under the Marie Skłodowska-Curie Actions, followed by the EIC Accelerator and the ERC Proof of Concept scheme.

Table 7: Seals of Excellence awarded

| Programme part                           | Number of proposals/researchers awarded with SoE |                               |
|--|--|-------------------------------|
|  | 2021-2024  | 2018-2020                     |
| Marie Skłodowska-Curie Actions:          | MSCA total: 5 342                                | 7 434                         |
| - MSCA COFUND                            | 60   |                               |
| - MSCA Postdoctoral Fellowships          | 5 282  |                               |
| European Innovation Council              | 1 304  | EIC Accelerator Pilot: 3 827  |
| - EIC Accelerator                        | 1 237*   | ~11000 if the SME instrument  |
| - EIC Transition                         | 67   | (phases I and II) is included |
| ERC Proof of Concept                     | 476  | 80                            |
| WIDERA Teaming for excellence            | 26   | 3                             |
| Mission on Adaptation to Climate Change  | 18   | n/a                           |
| <b>Total Seals of Excellence awarded</b> | <b>7 166</b>                                     | <b>20 890</b>                 |

*Source:* Commission monitoring systems, 6 January 2025. For EIC Accelerator: EISMEA internal monitoring, 15 January 2025. For EIC Transition, DG RTD monitoring, 25 September 2024. MSCA data for 2018-2020 provided by DG EAC. The table may not include SoEs issued within calls launched in 2024 that were not available in the monitoring resource at the reference date.

These statistics evolve due to the changes between Horizon 2020 and Horizon Europe. For instance, the number of entities that reach the final selection stage in the EIC Accelerator is lower than under its predecessor, the SME instrument phase 2, which also results in fewer Seals of Excellence being issued in Horizon Europe.

Almost all SoEs are issued in mono-beneficiary schemes. As an exception, the Mission on Adaptation to Climate Change awarded a Seal of Excellence for collaborative projects that met the selection criteria but could not be funded. However, this pilot was cancelled: the multi-beneficiary nature of these projects has made it difficult to ensure uptake at national level.

Around half of unsuccessful applicants who responded to the evaluation survey (45% of the 129 respondents) reported that the Seal of Excellence did not make it easier to secure alternative funding. Another 20% did not know or the question was not applicable. In open question responses, applicants specifically mentioned a lack of follow-up funding opportunities in their respective Member States that recognise their SoE.

While there is no legal obligation for Member States and beneficiaries to report back on the use of the SoE, some evidence has been collected through the Seal of Excellence Community of Practice, a forum that includes national and regional authorities. According to the voluntary reporting of its members, since the start of the initiative more than 40 national and/or regional Seal support schemes, including ERDF programmes, have been set up in most Member States.

Member States have seized the opportunity of creating synergies between Horizon Europe and the Recovery and Resilience Facility (RRF) by supporting SoE projects. Some examples are listed below.

- Spain allocated EUR 50 million in its recovery and resilience plan (RRP) to 33 innovative companies with SoE from the 2021 and 2022 EIC Accelerator calls. Similarly, Greece allocated EUR 18 million in its RRP to start-ups and SMEs. Bulgaria, Czechia and Slovakia are currently providing similar support.
- In Italy, the Ministry of Research launched an initiative to support approximately 400 researchers under its RRP.

\* The count does not include 3 proposals that received a Seal of Excellence were subsequently funded by the EIC Accelerator using resources from the European Regional Development Fund assigned to Lithuania, the host country of the applicant companies.



- In Slovenia, a new initiative funded by the RRF provides financial support to Slovenian researchers who, since 2019, have been awarded the MSCA SoE when they applied with a host organisation abroad under MSCA IF and MSCA PF calls<sup>446</sup>.

### *EU Missions and European Partnerships as instruments of synergy*

In terms of the EU Missions' *objectives and design*, previous assessments found synergies with other EU programmes. In the digital technologies field, several EU Missions share common objectives with the **ERDF and Digital Europe programme**<sup>447,448,449,450</sup>. Four out of five Missions' goals are also aligned with the priorities of the **LIFE programme**<sup>451</sup>. In the **Europe's Beating Cancer Plan**, the Cancer Mission is a major component of EU's investment in cancer<sup>452</sup>. This enables close synergies with the EU4Health Programme<sup>453</sup>.

While there is no systematic reporting on synergies, the Policy Support Facility (PSF)<sup>454</sup> identified the following progress.

- In the Climate Adaptation Mission, around 80 LIFE and InterReg<sup>455</sup> projects have been identified as relevant for climate resilience, with over 20 actively participating in the Mission's Community of Practice<sup>456</sup>, sharing adaptation best practices<sup>457</sup>.
- The Ocean and Waters Mission 'is acting as a catalyst for synergies and complementarities across different EU, national and regional programmes, already pooling funds beyond R&I, namely EMFAF12 national plans, BlueInvest with at least EUR 1 billion in risk finance<sup>458</sup>, Recovery and Resilience Funds, Interreg and Copernicus'<sup>459</sup>.
- The Cities Mission mobilised support from the EIB (which participates in the review process of Climate City Contracts, provides advisory services to Mission cities and has set aside a lending envelope of EUR 2 billion to cities that received the Cities Mission Label).
- All CEF calls that launched in September 2022 for projects on the TEN-T network (for a total of EUR 5 billion) include participation in the Cities Mission as an award criterion under 'priority and urgency'.
- References to the Cities Mission and the Climate Adaptation Mission were included in call topics 'greener cities' (overall budget EUR 120 million) and 'energy transition' (overall budget EUR 90 million) under the Urban Innovative Action initiative managed by DG REGIO.

<sup>446</sup> Excellent Science evaluation study, 2024, p. 53. <https://data.europa.eu/doi/10.2777/2295765>

<sup>447</sup> Guidance on synergies with the ERDF, annex to Communication to the Commission C(2022) 4747 final, p. 42.

<sup>448</sup> Ibid., pp. 44-45. Study supporting the assessment of EU missions and the review of mission areas: Mission Climate-neutral and smart cities assessment report, pp. 40-41, 2023. <https://data.europa.eu/doi/10.2777/35567>

<sup>449</sup> SWD(2023) 260 final, p. 31 and 55. <https://op.europa.eu/s/zE5j>

<sup>450</sup> Ibid., p.58.

<sup>451</sup> Such as Nature and Biodiversity (Soil and Ocean Missions), Circular Economy and Quality of Life (Cancer and Cities Missions), Climate Change Mitigation and Adaptation (Adaptation to Climate Change Mission), and Clean Energy Transition (Cities Mission). Commission Staff Working Document SWD(2023) 260 final, p. 27 and 29 – Adaptation to Climate Change, p. 84 – Ocean, p. 113, 130 – Soil).

<sup>452</sup> Europe's Beating Cancer Plan – Communication from the Commission to the European Parliament and the Council, 2022, p. 6. [https://health.ec.europa.eu/system/files/2022-02/eu\\_cancer-plan\\_en\\_0.pdf](https://health.ec.europa.eu/system/files/2022-02/eu_cancer-plan_en_0.pdf)

<sup>453</sup> EU4Health programme 2021-2027 – a vision for a healthier European Union, available [here](https://europa.eu/eu4health/)

<sup>454</sup> Penna, C., Mission-oriented funding and instrument synergies – Mutual learning exercise on EU missions – Third thematic report, Publications Office of the EU, 2024, pp. 20-21. <https://data.europa.eu/doi/10.2777/647815>

<sup>455</sup> [Climate adaptation mission portfolio Public - Projects | Sheet - Qlik Sense \(europa.eu\)](https://climate-adaptation-mission-portfolio-public-projects-sheet-qlik-sense.europa.eu)

<sup>456</sup> <https://futurium.ec.europa.eu/en/eu-mission-adaptation-community>

<sup>457</sup> [Adaptation Stories \(europa.eu\)](https://adaptation-stories.europa.eu)

<sup>458</sup> Including the launch of 'EU Blue Champions' scheme to support innovative projects. [https://maritime-forum.ec.europa.eu/news/launch-eu-blue-champions-scheme-support-innovative-projects-2023-12-21\\_en#:~:text=A%20new%20pilot%20scheme%2C%20%27EU%20Blue%20Champions%27%2C%20is,advisory%20to%20selected%20projects%20in%20the%20blue%20economy.](https://maritime-forum.ec.europa.eu/news/launch-eu-blue-champions-scheme-support-innovative-projects-2023-12-21_en#:~:text=A%20new%20pilot%20scheme%2C%20%27EU%20Blue%20Champions%27%2C%20is,advisory%20to%20selected%20projects%20in%20the%20blue%20economy.)

<sup>459</sup> Communication "EU Missions two years on – assessment of progress and way forward", 2023, p. 5.



- 18 Member States have integrated the Soil Mission by into their Common Agricultural Policy strategic plans, which allows for the replication of solutions in more than 1 000 testing sites, and the Mission is also being taken up by regional and local authorities.

Together with Europe's Beating Cancer Plan, the Cancer Mission has set up a new dialogue with Member States on the disease. This dialogue brings together health and research ministries in the joint cancer subgroup, ensuring that scientific knowledge gained through R&I informs policy development. This integrated approach is being replicated at national level, by the ECHoS project, supporting the creation of 'National Cancer Mission Hubs' in Member States.

European Partnerships reported in the BMR survey that their **synergies mostly consist of strategic exchanges, communication and dissemination of results and networking with project partners in the same area of research or a similar one**. Only one third of BMR partnership respondents indicated joint calls for research and/or innovation proposals (together with other partnerships)<sup>460</sup>. Nevertheless, five partnerships reported that the share of budget covered by regional and national funds is above 50%: Risk assessment of chemicals – 50%, Global health EDCTP3 – 59%, Metrology – 56%, and Biodiversa – 79.4%.

#### **Several JUs are co-funded by other EU programmes:**

- the EuroHPC JU receives most of its funding from the Digital Europe programme and the Connecting Europe Facility – a commitment of EUR 2.2 billion for 2021-2027 (with Horizon Europe contributing EUR 900 million)<sup>461</sup>;
- the Clean Hydrogen JU is co-funded by REPowerEU (for the Clean Hydrogen Valleys)<sup>462</sup>;
- the Chips JU is co-funded by the Digital Europe Programme with EUR 1.45 billion (against a Horizon Europe contribution of EUR 2.725 billion)<sup>463</sup>;
- in the 2024 Biennial Monitoring Report on Partnerships, at least four Member States reported to have financially supported their participation in co-funded partnerships through the use of ESIF and ERDF funds<sup>464</sup>, and the Recovery and Resilience Fund<sup>465</sup>.

Among the co-programmed partnerships, only 'Clean Steel - Low Carbon Steelmaking' has received a commitment of funding from other EU funds – in this case from the Research Fund for Coal and Steel (RFCS) for an amount of EUR 350 million (matching the contribution from Horizon Europe)<sup>466</sup>. The contribution from the RFCS to the Clean Steel Partnership is in the form of a dedicated high-TRL call (the Big Tickets call) for large pilot and demonstration projects. This call has encountered problems on the budget-expenditure side. Between 2021 and 2024, only 31% of the planned EUR 208 million budget was spent.

**The EIT KICs have been acting as implementors in other parts of Horizon Europe**, conducting R&I activities which facilitate cross-policy, cross-sectoral and international cooperation. Their participation is shown in the following examples:

<sup>460</sup> European Commission, Biennial Monitoring Report (BMR), 2024, p. 37

<sup>461</sup> Article 5 of the EuroHPC Regulation. [https://eurohpc-ju.europa.eu/system/files/2022-03/uriserv\\_OJ.L\\_2021.256.01.0003.01.ENG\\_EN\\_TXT.pdf](https://eurohpc-ju.europa.eu/system/files/2022-03/uriserv_OJ.L_2021.256.01.0003.01.ENG_EN_TXT.pdf).

<sup>462</sup> RePowerEU Plan, COM/2022/230 final, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2022%3A230%3AFIN&qid=1653033742483>.

<sup>463</sup> Council Regulation (EU) 2023/1782 amending Regulation (EU) 2021/2085 establishing the Joint Undertakings under Horizon Europe, as regards the Chips Joint Undertaking, Article 9. <https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32023R1782>

<sup>464</sup> BMR 2024, p. 77.

<sup>465</sup> BMR 2024, p. 196. The case of Italy is specifically mentioned.

<sup>466</sup> MoU for the Clean Steel partnership. [https://research-and-innovation.ec.europa.eu/system/files/2022-01/c\\_2021\\_4113\\_fl\\_annex\\_en\\_v4\\_pl\\_1213800.pdf](https://research-and-innovation.ec.europa.eu/system/files/2022-01/c_2021_4113_fl_annex_en_v4_pl_1213800.pdf)

- In the *Preparatory action for setting up joint programmes among innovation ecosystems actors and Stimulating Experimentation Practices* calls<sup>467</sup>, the EIT KICs were listed as the target groups.
- Involvement of the EIT KICs in the EIE CONNECT calls: EIT KIC Health is in the project on *Growing Connection for Bio Ecosystems* (COBIOE) and *Inclusive and Interconnected Ecosystem to Boost Paediatric Innovation in Europe* (i4KIDS-EUROPE). In the project *Mediterranean Island Cleantech Innovation Ecosystem* (MICIE), the EIT Climate-KIC is one of the partners<sup>468</sup>.
- The EIT Climate-KIC leads the flagship project consortium under the EU Mission for Adaptation to Climate Change, Pathways2Resilience, and also leads the NetZeroCities consortium running the Cities Mission platform (with an EU contribution of EUR 96.3 million, according to CORDA data in July 2024).
- The EIT KICs are supporting the implementation of the Mission Soil living labs: EIT Climate-KIC and EIT Food are part of the consortium supporting the Mission Soil living lab implementation<sup>469</sup>. EIT Food is also coordinating five living labs on carbon farming<sup>470</sup>.

The evaluation also found the following evidence of the partnerships' coherence with national initiatives.

- The **State Representatives Groups (SRGs)** serve as advisory bodies, ensuring alignment at all programming levels, from Strategic research and innovation agenda to annual work programmes, and national policies and priorities<sup>471</sup>. This was also highlighted as a positive factor in the external evaluation of several JUs (the Circular Bio-based Europe JU, SESAR3, Europe's Rail JU) as well as co-programmed partnerships (Built4People, 2ZERO, CCAM).
- In Hungary, the **EIT Digital Hungary branch received local government support** of EUR 60 000 to support running the Hungarian hub. In Estonia, TalTech University agreed to support Tallinn satellite operation and contributed EUR 90 000 in 2022<sup>472</sup>.

## 4.4 EU added value

### 4.4.1. Economic added value: Horizon Europe leveraged additional resources for R&I

As of 6 January 2025, project participants had invested a total of EUR 10.2 billion of their own resources in Horizon Europe projects. This is equivalent to a leverage factor of 0.236: in other words, each euro the EU invests in Horizon Europe R&I projects directly attracts additional R&I investments of about EUR 0.24. To date, the Horizon Europe's programme-wide leverage factor has not changed compared to the factor in Horizon 2020 projects (also 0.236).

With each euro of EU contribution, Horizon Europe leveraged around EUR 0.5 in co-investment from private for-profit bodies, which is about the same as in Horizon 2020. For SMEs specifically, the leverage factor is 0.36 (up from 0.33 at the end of Horizon 2020). For comparison, co-investment from higher education institutions is EUR 0.03 per euro invested by the EU.

An additional source of EU funding leverage not included in above statistics, is the **EIC Fund**, the equity instrument of the EIC Accelerator. This instrument is aimed specifically at SMEs (and

<sup>467</sup> HORIZON-EIE-2023-CONNECT-01-02 and HORIZON-EIE-2023-CONNECT-02-01.

<sup>468</sup> First two bullets from the Innovative Europe study, 2024, section on 7.1 on int. coherence, p. 85, <https://data.europa.eu/doi/10.2777/499132>. Details in Table 1, Case study 6. <https://data.europa.eu/doi/10.2777/354>.

<sup>469</sup> <https://cordis.europa.eu/project/id/101145592>

<sup>470</sup> <https://cordis.europa.eu/project/id/101157414>

<sup>471</sup> Green transition evaluation study, Appendix J, p. 923. <https://data.europa.eu/doi/10.2777/489648>

<sup>472</sup> Partnership Evaluation report, Section 4.2. <https://data.europa.eu/doi/10.2777/431739>

small mid-caps). For the Horizon Europe period only, as of 2 December 2024, the EIC Fund had disbursed approximately EUR 570 million: the sum includes EUR 471 million in equity investment over 104 funding rounds, as well as 38 convertible loans (EUR 97 million).

One of the goals of the EIC Fund is to match each of its investments by at least an equivalent amount of capital from other partners, such as private venture capital investors or public investment funds. As of 2 December 2024, the total amount of co-investment by partners other than the EU is EUR 1 491 million. Including also investment towards Horizon 2020 beneficiaries, since 2020, the EIC Fund has crowded in over EUR 2.6 billion of additional investment<sup>473</sup>.

The overall leverage effect of the EIC Fund is approximately 3:1<sup>474</sup>. For the Horizon Europe period, the leverage effect is equivalent to EUR 2.6 per euro invested by the EU, increasing to EUR 3.2 if only equity investments are considered. Convertible loans may be transformed into direct equity investments at a later point if enough matching partners are found. The co-investors are listed in the approval documents of the EIC Fund Advisory and Investment Committees. At the moment, information on co-investment to convertible loans is not channelled to the Fund's monitoring tools due to technical limitations. The EIB expects to make it available by the end of 2025.

The concept of leverage may also be used to encompass funding received by beneficiaries after project participation (a form of 'indirect' leverage). Information on additional investments collected by participants is currently not available to this evaluation for most programme parts: the first programme-wide data – as captured under the Key Impact Pathway 9 medium-term indicator<sup>475</sup> – will become available from 2025 onwards. The only programme part for which structured figures about additional investments are already available is the EIT: for several KICs, additional investments reported exceed by substantial margins the size of the EIT grant (most notably, over 30 times in the case of EIT KIC InnoEnergy). More data on additional investments collected by EIT KICs beneficiaries is available in Annex 7.

### *European Partnerships*

Looking at co-investment only, partnerships leverage more resources than the rest of the Framework Programme<sup>476</sup>. When all partnerships are excluded, the leverage factor for the 'mainstream' programme is around 0.09, equivalent to EUR 2.96 billion in co-investment. For partnerships as a whole, the leverage factor for project activities is 0.62 (EUR 7.22 billion).

Among the main Horizon Europe types of actions, joint undertakings have the highest direct leverage factor (0.8). In the average JU project, 55% of total eligible costs are covered by the EU, and 45% by project participants.

Leverage factors in JUs are higher for participants classified as for-profit companies: they invested EUR 2.83 billion in projects, a direct leverage factor of EUR 1.23 per euro in EU contribution the projects received. Out of this, at least EUR 2.17 billion comes specifically from privately-owned enterprises, and at least EUR 313 million from state-controlled enterprises. These have a comparatively high leverage factor of 2.25 (against 1.15 for companies without public ownership).

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<sup>473</sup> EISMEA, Scaling Deep Tech in Europe – the European Innovation Council Impact Report 2025. Available at: [https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f\\_en?filename=EIC-Impact-Report-2025.pdf](https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f_en?filename=EIC-Impact-Report-2025.pdf)

<sup>474</sup> Ibid.

<sup>475</sup> 'Scaling-up - Amount of public & private investment mobilised to exploit or scale-up results from the Programme (including foreign direct investments)'

<sup>476</sup> This indicator is called 'direct call leverage' in the BMR on partnerships, with an identical definition and calculation method.

All partnership types may also accept contributions from partners in the form of additional activities. The monetised value of the members' additional activities counts towards the partnership's leverage objectives – for some partnerships, these activities are the main source of leverage. Once additional activities are included, leverage factors for institutionalised partnerships increase significantly, with partners contributing to R&I activities already more than the EU contribution received to date (leverage factor higher than 1). However, availability and quality of data on additional activities varies – as does the level of Commission oversight on their content.

In principle, due to their design, co-funded partnerships leverage the most compared to the Horizon Europe contribution (leverage ratio of 2:1). However, Commission monitoring systems are currently unable to systematically track the status of these partnerships' implementation beyond the initial grants, as structured implementation data has not yet been included in central monitoring systems. This prevents the Commission from assessing how much of the leveraged funding comes from Member States, private partners, and from other EU budget sources, such as EU regional funds and the RRF. Co-programmed partnerships have the lowest leverage factor (0.14): by design, most of their leverage is supposed to come from additional activities beyond EU-funded actions and subsequent private investment after the pre-competitiveness phases.

The picture for institutionalised partnerships varies. Some of these partnerships have a longer track record, having existed in a similar organisational set-up for at least two programming periods (i.e. since before the start of Horizon 2020). In Horizon Europe, these 'older' partnerships have a substantially higher leverage factor than those that were created more recently. In particular, the three older EIT KICs have a leverage factor including additional activities, close to 3:1, but a gap between 'older' and 'newer' partnerships is also visible for JUs.

For details, see Annex 7.

### *EU Missions*

The Commission launched the EU Missions in 2021 with a budget of EUR 1.9 billion, which was intended to attract further investment. At the time of writing, there is no systematic approach yet to monitoring additional funds leveraged by these initiatives (which would not have been spent on these causes/objectives without the EU Missions' influence). Leverage of EU funding will be tracked through the KIP Dashboard from 2025, and in 2026, a comprehensive Missions assessment will investigate funding beyond Horizon Europe, in particular shared management programmes.

Nevertheless, the Cities Mission has successfully pooled resources from the national level, in cases where Member States have committed additional funding to support the cities participating in the Mission to become climate neutral. The Cities Mission also mobilised support from the EIB (the EIB participates in the review process of Climate City Contracts, provides advisory services to Mission cities and ringfenced a lending envelope of EUR 2 billion to cities that have received the Cities Mission Label).

#### *4.4.2. Horizon Europe-supported activities would not have been possible without EU funding*

##### *Collaboration networks across borders*

One of the key aspects of Horizon Europe's added value is its ability to promote cooperation on a large scale across countries. Most national (or regional) programmes may fund bilateral or, more rarely, trilateral collaborations, but usually they do not fund wider collaboration networks<sup>477</sup>. Of the EUR 43.2 billion in grants signed by 6 January 2025 under Horizon Europe,

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<sup>477</sup> European Commission (2024). Align, act, accelerate, p. 20. <https://data.europa.eu/doi/10.2777/9106236>.



81% were collaborative grants<sup>478</sup>. Since there are usually no limits to the number of participants in Horizon Europe consortia, these tend to be wide, including on average 11.3 participants<sup>479</sup>.

The added value of collaboration is reflected in feedback from beneficiaries. The key elements of EU added value identified by beneficiaries include: (1) international cooperation and mobility opportunities for researchers; (2) access to world-class research and technology infrastructures; (3) support for research topics and areas not covered by national and regional R&I funding programmes; and (4) the drive for excellence through EU-wide competition for R&I funding<sup>480</sup>.

### *Scale and scope of R&I support*

Horizon Europe supports types of R&I that could not be funded at national and regional level. This is not only because of the extensive nature of the collaboration networks but also because the programme provides funding for a wide range of research topics. More specifically, there is clear relevance and added value for security research (Cluster 3) because most Member States except Germany, Austria, Bulgaria, Czechia, and Italy do not have an equivalent national programme in this field<sup>481</sup>. They therefore rely on Horizon Europe for the development of innovative solutions in civil security, border management, disaster resilience and the protection of critical infrastructures<sup>482</sup>. A project receiving Horizon Europe funding is perceived as trustworthy and relevant among stakeholders in the field of security<sup>483</sup>.

One significant benefit of Pillar III programmes is their ability to address the financing shortfall encountered by innovative actors in their national setting. For example, EIC funding enables programme beneficiaries to scale up innovation that would otherwise be unfeasible. As highlighted by the beneficiaries interviewed, projects would have progressed at a slower pace and on a smaller scale without this funding<sup>484</sup>.

The EU added value of Horizon Europe is also demonstrated by the fact that project proposals that were not selected for funding needed to be revised to secure national or regional sources of funding. According to the evaluation survey respondents, revisions to the projects included a reduced project scope (in terms of areas covered; 82%; 1 575 respondents), less complex methods (79%; 1 462 respondents), fewer research outputs (77%; 1 435 respondents), a smaller number of consortium partners (85%; 824 respondents) and shorter durations (75%; 1 368 respondents). As a result, projects were often funded at a smaller scale than what Horizon Europe would have offered.

Another significant aspect of the EU added value of Horizon Europe is the pooling of resources on a broader scale than at national level. A good example is rare diseases, where the low number of patients requires such a pooling to reach sufficient statistical levels<sup>485</sup>.

The added value of Horizon Europe support to cross-border collaboration and networking is particularly visible in the widening part of the programme. Case study evidence shows that there are no grants available in widening countries that are comparable to those available under Horizon Europe widening actions, which aim to foster connections with leading partners and

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<sup>478</sup> Analysis based on CORDA data with cut-off on 2 December 2024.

<sup>479</sup> Analysis based on CORDA data with cut-off on 2 December 2024.

<sup>480</sup> Based on responses from MSCA PF and ERC beneficiaries to a targeted survey carried between May and July 2023. Number of respondents for each topic: 1. 1 042; 2. 1 034; 3. 1 038; 4. 1 042. Excellent Science evaluation study, 2024, <https://data.europa.eu/doi/10.2777/2295765>; Innovative Europe Study.

<sup>481</sup> Enhancing security through research and innovation SWD(2021) 422 final; Resilient Europe evaluation study, 2024, Case Study 11, <https://data.europa.eu/doi/10.2777/22355>

<sup>482</sup> Resilient Europe evaluation study, 2024, Case Study 11. <https://data.europa.eu/doi/10.2777/22355>

<sup>483</sup> Ibid., p. 133.

<sup>484</sup> Innovative Europe Study, Chapter 8.1, page 91, referring also to relevant Case Studies 1 and 2.

<sup>485</sup> European Commission, Directorate-General for Research and Innovation, Rare diseases : a major unmet medical need, Publications Office, 2017, <https://data.europa.eu/doi/10.2777/749056>



boost the quality of the research produced in widening countries<sup>486</sup>. A separate study reveals that, from Horizon 2020 to Horizon Europe, widening countries teams have surpassed those from third countries' teams in terms of presence in consortia networks<sup>487</sup>.

By bringing together resources, partners and infrastructure across countries, sectors and disciplines, EU R&I funding is able to support a range of initiatives of unparalleled scale and complexity<sup>488</sup>. This creates the necessary critical mass to strengthen the EU science-for-policy ecosystem.

Horizon Europe is designed to support key EU priorities. In the digital space, the programme has effectively identified and supported high-growth areas where the EU has the potential to take or reinforce its leadership<sup>489</sup>. Similarly, the programme has contributed to the European Green Deal, namely through Cluster 5 and Cluster 6 projects. It has enabled collaboration where it would otherwise not exist, particularly through solutions that make use of data generated via Earth observation<sup>490</sup>.

#### 4.4.3 Structuring effect of Horizon Europe and the European partnerships

Horizon Europe is supporting thousands of new collaborations between researchers, which has a structuring effect on the ERA, the single, borderless market for research, innovation and technology that is being built in the EU. In particular, based on their individual evaluations in annex of the SWD, all the European partnerships deliver EU added value through the development of long-lasting knowledge networks. SESAR exemplifies this by bringing all European air traffic management stakeholders together to support the entire ATM value chain and align with the Single European Sky initiative<sup>491</sup>. Similarly, the SNS JU (following 5G PPP), harnesses cross-border effects to accelerate the development of 5G and 6G technologies, securing a competitive edge for European tech companies<sup>492</sup>.

All European Partnerships have a strategic research agenda or work programme that brings together the EU and other partners such as Member States, industries and foundations, to agreeing on joint priorities for funding. This is a key feature that distinguishes partnerships from other collaborative instruments<sup>493</sup>. For example, the tripartite approach of the Chips JU, which involves co-funding and joint decision-making with the private sector and Member States, promotes coordination with national activities, contributing to the ERA in the microelectronics field<sup>494</sup>.

Each JU also brings added value by tackling sectoral or research fragmentation. One example is EuroHPC: previously, the EU had 27 different supercomputing programmes and lacked its own supercomputers. With the creation of EuroHPC, the EU has gained a prominent position as a world power in supercomputing with its own systems<sup>495</sup>. EU-Rail tackles the rail industry's

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<sup>486</sup> Excellent Science evaluation study, Annex 2.7. <https://data.europa.eu/doi/10.2777/9552959>

<sup>487</sup> European Commission (2024). The Structuring effect of consecutive Framework Programmes for health research, Working Paper for the Resilient Europe evaluation support study, pp. 10-12 ([The Structuring effect of consecutive Framework Programmes for health research - Publications Office of the EU](#)).

<sup>488</sup> European Commission, Mitra, A., Canton, E., Ravet, J. and Steeman, J. (2024). The added value of European investments in research and innovation, p. 8. [https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data/publications/all-publications/added-value-european-investments-research-and-innovation\\_en](https://research-and-innovation.ec.europa.eu/knowledge-publications-tools-and-data/publications/all-publications/added-value-european-investments-research-and-innovation_en).

<sup>489</sup> European Commission (2024). Horizon Europe and the Digital & Industrial Transition, p. 90. <https://op.europa.eu/en/publication-detail/-/publication/44b1b11b-7fa2-11ef-a67d-01aa75ed71a1/language-en>.

<sup>490</sup> European Commission (2024). Horizon Europe and the Green Transition, p. 90. <https://op.europa.eu/en/publication-detail/-/publication/c9383687-6420-11ef-a8ba-01aa75ed71a1/language-en>.

<sup>491</sup> SESAR JU evaluation report in annex 19, p. 13.

<sup>492</sup> SNS JU evaluation report in annex 20, p. 13.

<sup>493</sup> Biennial Monitoring Report on European Partnerships, 2024, p. 19. <https://data.europa.eu/doi/10.2777/991766>.

<sup>494</sup> Chips JU evaluation report in annex 11, p. 16.

<sup>495</sup> EuroHPC JU evaluation report in annex 16, p. 15.

structural and geographical fragmentation by delivering via an integrated system approach, a high capacity, flexible, multi-modal and reliable integrated European railway network by eliminating barriers to interoperability and providing solutions for full integration, for European citizens and businesses<sup>496</sup>.

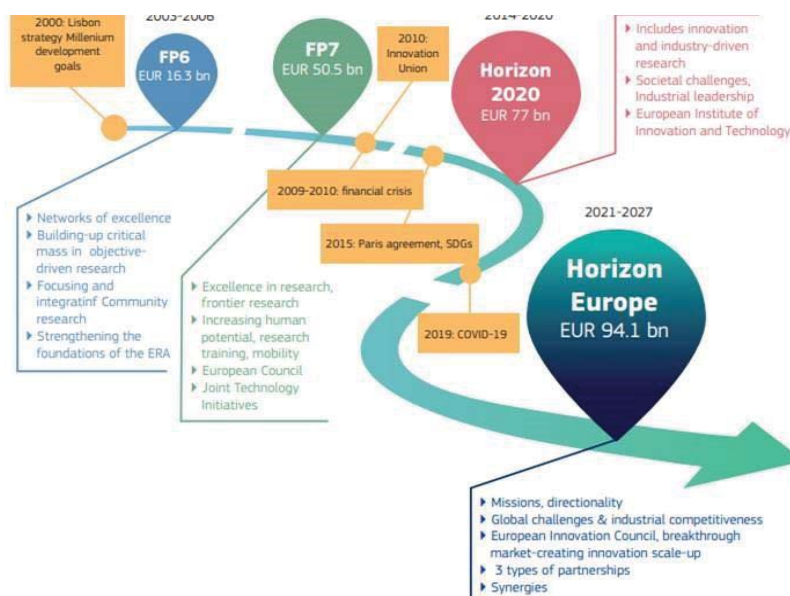
Half of the partnerships include a particular focus on funding high-TRL projects. Under the CBE JU, the deployment of large-scale, first-of-a-kind projects at TRL 8, known as Innovation Action-Flags (IA-FLAG), has upscaled the bio-based sector to market level, with a high participation of SMEs (51% of all CBE funding as of December 2023)<sup>497,498</sup>.

## 4.5 Relevance

### 4.5.1. Responding to the needs of beneficiaries

2024 marked the 40th anniversary of the first framework programme for research and innovation. Certain parts of Horizon Europe have existed in several framework programmes, demonstrating these parts' value and relevance. This includes thematic priorities (currently the clusters in Pillar II), research infrastructures, the ERC, the MSCA, widening participation, strengthening the ERA, direct R&I actions through the JRC, as well as the Euratom programme. They have been reformulated and regrouped in various ways; however, they show overall a remarkable degree of continuity. Other features of the programme were added more recently – in Horizon Europe, new features included greater mission and impact-orientation (with five EU Missions and nine Key Impact Pathways for the programme), while also integrating the EIC as a fully-fledged programme part.

Figure 15: Evolution of the framework programme for R&I



Source: DG RTD, SRIP Chapter 2.1

<sup>496</sup> Europe's Rail JU evaluation report in annex 15, p. 17.

<sup>497</sup> European Commission, SME participation in Horizon Europe, 2024, p. 24.  
<https://data.europa.eu/doi/10.2777/576670>

<sup>498</sup> CBE JU evaluation report in annex 12, p. 3.

The mechanisms used to shape these changes included the stakeholder consultation, and the interim and ex post evaluations of Horizon 2020. Stakeholders are involved in the preparation of the strategic plans and the work programmes. For example, the largest ever stakeholder consultation on the framework programme, ‘Public consultation on the past, present and future of the European Research & Innovation Framework programmes 2014-2027’, started in December 2022 and closed in February 2023 with 1 663 replies associated with the section on Horizon Europe, as well as 136 position papers from various stakeholders. It supported foresight activities<sup>499</sup> and other analyses<sup>500</sup>, as well as the strategic plan itself<sup>501</sup>.

These analytical activities in particular showed that the needs that must be addressed by Horizon Europe are evolving<sup>502</sup>. The past few years have been marked by global crises, including the COVID-19 pandemic, the Russian invasion of Ukraine, the energy crisis and high inflation, and the increased frequency of climate-related extreme events. These recent events – along with longer-term challenges such as climate change, biodiversity loss, pollution, decarbonisation, the green and digital transition, resilience, and competitiveness – provide an opportunity to ‘build forward better’. Moreover, the new geopolitical context has placed the EU’s just green and digital transition in the spotlight, requiring the reduction of strategic dependencies, for example on critical technologies, raw materials and finite critical minerals, and the speedup of the net zero industrial transformation to strengthen the EU’s resilience and foster its leadership in key technological domains and (global) value chains. The framework programme for research and innovation, with its dedicated instruments and objectives, has a direct impact on both the shorter-run crises and the longer-run challenges. The foresight and other analytical activities underpinning its Strategic Plan – including this evaluation – equip the programme with the information necessary to adapt and respond to evolving needs in the future.

One of the programme instruments that was rationalised under Horizon Europe in order to respond more effectively to needs and EU priorities are the European Partnerships. Their number decreased by more than half (more details on this in section 4.2.3. on simplification). The partnerships focus on the main EU priorities described below.

- **Strategic autonomy and global positioning:** Partnerships, such as EuroHPC, CHIPS, Global Health EDCTP3, SNS, Photonics, and Made In Europe, focus on ensuring the availability of components, technologies and know-how<sup>503</sup>. EIT Digital and EIT Manufacturing also contribute to this priority, by building and scaling ventures, support the commercialisation of innovation and upskilling talents in critical technologies<sup>504</sup>.
- **Green transition, sustainability and biodiversity:** The partnerships under Cluster 5, the co-programmed partnership on clean steel and zero-emission mobility (2Zero), together with the EIT Climate-KIC, EIT InnoEnergy and EIT Urban Mobility, contribute to reducing greenhouse emissions, designing more efficient transport and infrastructure, supporting a clean energy transition and circular economy, and fostering a competitive and innovative European hydrogen economy and battery industry<sup>505</sup>. The partnerships under Cluster 6 and EIT Food contribute to a better sustainability of food systems, improving the good

<sup>499</sup> Commission: Directorate-General for Research and Innovation, Weber, M., Wasserbacher, D. and Kastrinos, N., *Foresight towards the 2nd Strategic Plan for Horizon Europe*, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2777/77971>.

<sup>500</sup> Commission: Directorate-General for Research and Innovation, *Horizon Europe strategic plan 2025-2027 analysis*, Publications Office of the European Union, 2023, <https://data.europa.eu/doi/10.2777/637816>

<sup>501</sup> European Commission, Directorate-General for Research and Innovation, *Horizon Europe strategic plan 2025-2027*, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/092911>

<sup>502</sup> Horizon Europe strategic plan 2025-2027 analysis, 2023, p. 9.

<sup>503</sup> Digital & Industrial Transition evaluation study, 2024. Annex I, p. 40. <https://data.europa.eu/doi/10.2777/489648>

<sup>504</sup> European Commission, BMR 2024 on partnerships in Horizon Europe, 2024, p. 64.

<sup>505</sup> Ibid, p. 74.

environmental status<sup>506</sup> by 2030, mainstreaming biodiversity in key sectors and policies, and improving livelihoods, health and access to water<sup>507</sup>.

- **Digital transition and industrial competitiveness:** Partnerships under different clusters have integrated elements to facilitate the digital transition. The most relevant are under Cluster 4, which, together with EIT Digital, promote digitisation and a competitive and secure EU data economy<sup>508</sup>. Examples of other partnerships include the CBE, which develops innovative and sustainable bio-based solutions and deploys them in the market (see Annex 12).

All joint undertakings have as one of their primary objectives to ‘secure and enhance Union competitiveness’. As a thematic example<sup>509</sup>, one of the three specific objectives of the Innovative Health Initiative JU is to ‘drive cross-sectoral health innovation for a globally competitive European health industry and contribute to reaching the objectives of the new Industrial Strategy for Europe and the Pharmaceutical Strategy for Europe’. All projects supported by this JU include mandatory contributions from the health industry that participates in joint projects with academia, hospitals, SMEs and others<sup>510</sup>.

- **Health and preparedness:** EDCTP2 delivered results related to COVID-19, antimicrobial resistance, malaria, tuberculosis and HIV. In addition, Horizon Europe continues the course of Horizon 2020 and FP7 in contributing to pandemic research preparedness and response. Support for research related to the COVID-19 pandemic continued, and a response to the 2022 mpox epidemic was mobilised. More details on this are in Section 4.5.3. on responding to emergencies.

The IMI2 JU (IHI’s predecessor) delivered results on diagnosing or treating conditions that significantly affect the EU population such as cancer<sup>511</sup>, cardiovascular diseases<sup>512</sup> and diabetes<sup>513</sup>. It contributed to developing Ebola vaccines<sup>514</sup> and improved methodologies for studying drug safety and running clinical trials with adults<sup>515</sup> and children<sup>516</sup>, the latter involving over 250 hospital sites.

In addition, all the four types of funding set out in the EU Financial Regulation<sup>517</sup> – grants, prizes, financial instruments and procurement – are combined in the implementation of Horizon Europe, in order to respond to the beneficiaries’ needs. The programme has also proved to be flexible in combining these instruments. For example, the EIC uncoupled its grant and equity funding for start-ups, so that applicants can either bid for blended support while being able to postpone raising equity to a later stage or bid for only a grant or equity.

#### 4.5.2. Strengthening Europe’s competitiveness

Promoting the EU’s competitiveness is one of the general objectives of Horizon Europe. Private and public sector investment is a necessary condition for strengthening Europe’s

<sup>506</sup> Directive 2008/56/EC of the European Parliament and of the Council of 17 June 2008 establishing a framework for community action in the field of marine environmental policy (Marine Strategy Framework Directive).

<sup>507</sup> European Commission, BMR 2024, p. 76.

<sup>508</sup> Ibid, p. 80.

<sup>509</sup> Art 115.1(c) of Regulation 2021/2085 establishing Joint Undertakings under Horizon Europe.

<sup>510</sup> Resilient Europe valuation study, Case Study 2 on IMI2 and IHI, p. 233.

<sup>511</sup> <https://cordis.europa.eu/project/id/115749>

<sup>512</sup> <https://cordis.europa.eu/project/id/116074>

<sup>513</sup> <https://cordis.europa.eu/project/id/945268> and <https://cordis.europa.eu/project/id/821508>

<sup>514</sup> <https://cordis.europa.eu/project/id/115854>

<sup>515</sup> <https://cordis.europa.eu/project/id/853966/results>

<sup>516</sup> <https://cordis.europa.eu/project/id/777389>

<sup>517</sup> Regulation (EU, Euratom) 2018/1046 on the financial rules applicable to the general budget of the Union, <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:32018R1046>

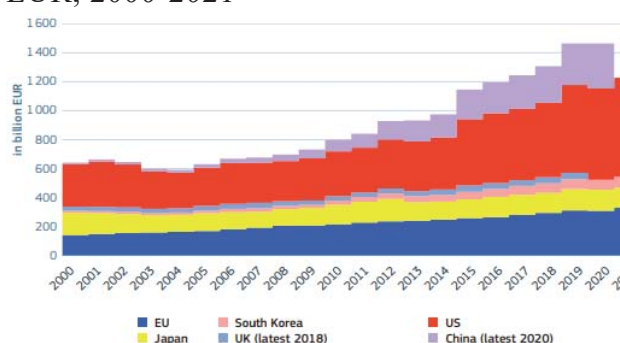


competitiveness. Although the EU has set itself an ambitious R&D investment target of 3% of GDP, it is struggling to achieve this objective. In 2022, the EU would have needed to invest an additional EUR 123 billion to reach the 3% target, more than the budget of an entire seven-year framework programme for R&I<sup>518</sup>.

While the EU has increased its R&D investment over the past two decades<sup>519</sup>, the R&D *intensity* gap between the EU and the US and South Korea has also widened (Figure 15)<sup>520</sup>. In the EU, this gap is mainly due to a lack of private R&D investment. For example, venture capital funds raised in the EU are equal to only 5% of global venture capital finance, compared with 52% in the US<sup>521</sup>. Compared with the US, the EU also lags significantly behind in the development and adoption of digital technologies, which are a key enabler of innovation<sup>522,523</sup>. More generally, the EU lags behind other key players in strategic, productivity-enhancing technologies, including in the digital domain. It remains a leader in green infrastructure, outperforming both China and the US in areas related to climate adaptation and energy technologies and environment, but it has not kept up with progress in more complex technologies<sup>524</sup>.

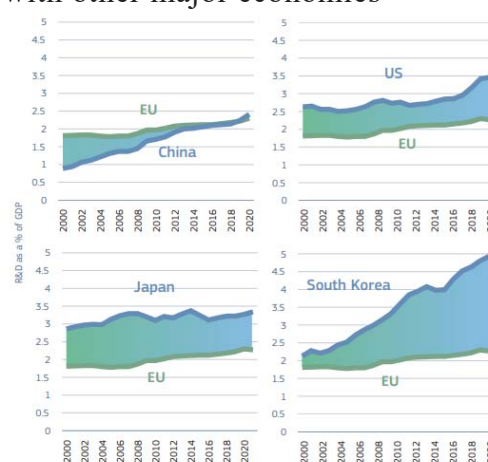
In addition, the valorisation of R&D outputs remains a challenge: only about one-third of the patented inventions registered by European universities or research institutions are commercially exploited<sup>525</sup>.

Figure 16: R&D expenditure in billion EUR, 2000-2021



Source: DG Research and Innovation, Common R&I Strategy and Foresight Service, Chief Economist Unit, based on Eurostat (online data code: rd\_e\_gendtot).  
Note: The UK value of 2020 is a prediction based on the annual compound growth rate from 2014-2019.

Figure 17: The EU's R&D intensity gap with other major economies



Source: DG Research and Innovation, Common R&I Strategy and Foresight Service, Chief Economist Unit, based on Eurostat and OECD data.

The objective of competitiveness is clearly the focus of Pillars II and III. Pillar II seeks to promote industrial competitiveness throughout the R&I journey. Work programmes have also increasingly focused on key enabling technologies (KETs) and critical technologies for industry,

<sup>518</sup> DG RTD, SRIP chapter 2.1, p. 49. <https://data.europa.eu/doi/10.2777/965670>

<sup>519</sup> Ibid., p. 47

<sup>520</sup> Ibid., p. 31

<sup>521</sup> European Investment Bank (2024). The scale-up gap: Financial market constraints holding back innovative firms in the European Union, page 22. [https://www.eib.org/attachments/lucalli/20240130\\_the\\_scale\\_up\\_gap\\_en.pdf](https://www.eib.org/attachments/lucalli/20240130_the_scale_up_gap_en.pdf).

<sup>522</sup> DG RTD, EIS, chapter 1, p. 7-8

<sup>523</sup> European Commission, Directorate-General for Research and Innovation, Science, research and innovation performance of the EU, 2024 : a competitive Europe for a sustainable future, pages 86-88, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/965670>.

<sup>524</sup> European Commission, Directorate-General for Research and Innovation, Science, research and innovation performance of the EU, 2024: a competitive Europe for a sustainable future, page 38, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/965670>.

<sup>525</sup> Draghi, M., "The future of European competitiveness – A competitiveness strategy for Europe", 2024, p. 25.



supporting convergence and cross-fertilisation<sup>526</sup>. Pillar III aims to fill the financing gap and strengthen innovation ecosystems.

The collaborative nature of Horizon Europe (see also Section 4) is key to promoting competitiveness, since it offers opportunities for European businesses and research organisations to forge international partnerships and access global markets, fostering economic growth<sup>527,528</sup>. For researchers, respondents to the survey highlighted how MSCA contributed to improving the working conditions of researchers, which in turn improve the attractiveness of their research organisations<sup>529</sup>.

Successful and unsuccessful applicants that responded to the surveys highlighted the relevance of the programme for competitiveness. Asked whether Horizon Europe provides sufficient funding opportunities across a range of specific areas, 47% (7 323) responded that the programme's research focuses on technological applications that are important to industrial competitiveness to a 'very large' or 'large' extent<sup>530</sup>. This was 53% (2 938) among beneficiaries.

#### 4.5.3. Response to emergencies and changing priorities

**The challenges addressed at the start of Horizon Europe are still present: climate change, biodiversity loss, increasing levels of pollution, health threats, security threats, and the digital transition are as relevant today as in 2021. Therefore, Horizon Europe remains as relevant now as when it started; in addition, it was able to adapt to changing circumstances.** The Russian invasion of Ukraine and the COVID-19 pandemic highlighted the need for flexible use of R&I instruments for short-term responses to unexpected crises and global challenges<sup>531</sup>. The evaluation of Horizon 2020 found the programme's response to new emerging challenges such the COVID-19 crisis to be even faster than it was for Ebola and Zika<sup>532</sup>. Similarly, programme parts across all Horizon Europe pillars responded to COVID-19, mpox and Ukraine emergencies – some examples are provided below and a more detailed description is in Annex 10.

- Cluster 1 is the only cluster with an 'emergency action fund', whose release can be triggered by a policy announcement (WHO's global pandemic)<sup>533</sup>. It mobilised resources and boosted preparedness for health emergencies. The first emergency call under Horizon Europe<sup>534</sup> provided EUR 123 million to tackle coronavirus and its variants<sup>535</sup>. This support advanced our understanding of the virus by developing diagnostics, treatments and vaccines, and fed into public health policies. For instance, the EuCARE project provided insights into the

<sup>526</sup> Viscido, S., Lotito, A. and Boekholt, P., Horizon Europe and the digital & industrial transition: interim evaluation support study, p. 44, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/845650>.

<sup>527</sup> Evaluation study on excellent science, p. 35, 2024. <https://data.europa.eu/doi/10.2777/2295765>.

<sup>528</sup> Denham, S., Stančiauskas, V., Dėlkutė-Morgan, R., Kazlauskaitė, D., et al., Evaluation support study on resilient Europe, p. 49, Publications Office of the European Union, 2024. <https://data.europa.eu/doi/10.2777/797281>.

<sup>529</sup> Evaluation study on excellent science, annexes, p. 88, 2024. <https://data.europa.eu/doi/10.2777/9552959>.

<sup>530</sup> For all applicants, 8% of respondents responded either 'to a small extent' or 'not at all' (7 323 respondents) and 26% responded 'do not know/not applicable' (4 095 respondents). For beneficiaries, these numbers are 5% (293 respondents) and 26% (1 460 respondents), respectively.

<sup>531</sup> Digital and Industrial Transition evaluation study, 2024, p. 25. <https://data.europa.eu/doi/10.2777/845650>

<sup>532</sup> SWD (2024) 29, p. 90. <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52024SC0029>

<sup>533</sup> The possibility for the mobilisation of emergency research funds is expressed as an 'other action' integrated in the Horizon WP for Health since 2018: Horizon Europe 2021-2022 work programme (p. 173): [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-4-health\\_horizon-2021-2022\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-4-health_horizon-2021-2022_en.pdf); and Horizon Europe 2023-2024 (p. 222): [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-4-health\\_horizon-2023-2024\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-4-health_horizon-2023-2024_en.pdf)

<sup>534</sup> Cluster 1 – funded under the 'label' of 'HERA incubator'.

<sup>535</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_21\\_1548](https://ec.europa.eu/commission/presscorner/detail/en/ip_21_1548)

severity of the different variants of SARS-CoV-2<sup>536</sup> and showed that opening schools did not increase transmission in Italy, Germany and Portugal<sup>537</sup>.

- In response to the mpox outbreak in 2022, the EU mobilised EUR 17 million of emergency funding under Cluster 1 to support European clinical research. For instance, the MPX-RESPONSE project is evaluating therapies against the disease<sup>538</sup>.
- A benchmark study of the United States medical research agency (National Institutes of Health) response to COVID-19 reported that Horizon Europe demonstrated flexibility in coping with changing circumstances in the world, including COVID-19. The study noted that the programme continues its funding efforts and directs initiatives on COVID-19 and coronavirus research, including preparations for the emerging variant<sup>539</sup>.
- The ERC identified 183 projects relating to COVID-19, such as diagnostics and treatments (including vaccines), medical devices, digital tools, AI, immunity, infection and pathology, social and economic behaviour, wellbeing and crisis management<sup>540</sup>.
- The Marie Skłodowska-Curie Actions supported doctoral candidates and post-doctoral researchers from Ukraine affected by the war by setting up the EUR 25 million MSCA4Ukraine scheme in 2022<sup>541</sup>. A EUR 10 million top-up was subsequently awarded in April 2024 to allow 50 additional researchers to continue their work safely in academia, businesses, research centres and public institutions based in the EU and countries associated to Horizon Europe. In total, 175 researchers from Ukraine had received a fellowship.
- The EIC and EIT published dedicated calls to tackle COVID-19<sup>542</sup>. The EIC also organised events to enable EIC companies to pitch to investors, companies and public healthcare authorities looking for innovative solutions to COVID challenges<sup>543</sup>.
- At the end of 2023, the EIT set up the EIT Community Hub<sup>544</sup> in Kyiv, working to bridge Ukraine and the EU's innovation ecosystem and boost ideas and businesses emerging from Ukraine<sup>545</sup>. The overall EIT support has so far channelled more than EUR 2 million to Ukraine between 2022 and 2023.
- Following the start of the Russian invasion of Ukraine, Cluster 5 was better aligned with REPowerEU, resulting in EUR 172 million funding for strengthening the EU's energy independence<sup>546</sup>.

*What messages emerged from the targeted evaluation survey of Horizon Europe beneficiaries?*

Across the Horizon Europe pillars, the percentage of beneficiaries who 'strongly agree' or 'rather agree' that **Horizon Europe gives more flexibility to respond to changing socio-economic needs compared with national and/or regional research funding** ranged from 45.6% in Pillar I and 54.2% in WIDERA actions. In contrast, the percentages of beneficiaries who 'Strongly disagree' or 'Rather disagree' were relatively low, ranging from 4.8% in Pillar III to 8.4% in Pillar II.

At project level, 13-15% of beneficiaries across Pillars II, III and WIDERA actions reported that the **COVID-19 pandemic was a challenge** to a 'large or very large extent', with a higher share of respondents under pillar I (19%). Similarly, the share of responding beneficiaries that reported that the **pandemic was not a challenge** when carrying

<sup>536</sup> [https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762\(24\)00021-8/fulltext](https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762(24)00021-8/fulltext)

<sup>537</sup> <https://www.sciencedirect.com/science/article/pii/S1201971223007634?via%3Dihub>

<sup>538</sup> <https://www.nature.com/articles/s41591-023-02393-6>

<sup>539</sup> Resilient Europe evaluation study, Annex 5, benchmark study 1, p. 21. <https://data.europa.eu/doi/10.2777/22355>

<sup>540</sup> European Research Council, COVID-19 Frontier research in the spotlight, 2022. [https://erc.europa.eu/sites/default/files/2022-08/COVID19-Frontier\\_research\\_in\\_the-spotlight.pdf](https://erc.europa.eu/sites/default/files/2022-08/COVID19-Frontier_research_in_the-spotlight.pdf)

<sup>541</sup> Ibid, pp. 843-844, <https://data.europa.eu/doi/10.2777/9552959>

<sup>542</sup> Innovative Europe evaluation study, 2024, Chapter 9.1, p. 98. <https://data.europa.eu/doi/10.2777/499132>

<sup>543</sup> Deep Tech Europe. EIC Impact Report, 2021, p. 50. <https://data.europa.eu/doi/10.2826/005280>

<sup>544</sup> Innovative Europe evaluation study, 2024, Chapter 4.1, pp. 40-41. <https://data.europa.eu/doi/10.2777/499132>

<sup>545</sup> <https://eit-ris.eu/ukraine/>

<sup>546</sup> [https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/commission-invests-eu172-million-research-and-innovation-projects-support-eu-energy-independence-2024-01-11\\_en#:~:text=The%20European%20Commission%20has%20awarded,independence%20of%20the%20European%20Union.](https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/commission-invests-eu172-million-research-and-innovation-projects-support-eu-energy-independence-2024-01-11_en#:~:text=The%20European%20Commission%20has%20awarded,independence%20of%20the%20European%20Union.)

out their project was lower in Pillar I (23%), in contrast to Pillars II, III and WIDERA actions (31-36%). *NB. ERC beneficiaries were not asked this question.*

## 5. What are the conclusions and lessons learned?

### 5.1 Conclusions

#### *To what extent has Horizon Europe been successful so far and why?*

Horizon Europe is **on track to achieve its objectives**: the number of peer-reviewed publications, patent applications and other Key Impact Pathway indicators are at a similar level as in the previous programme, Horizon 2020, at the same stage of monitoring.

Regarding research, over 79% of all publications are reported by beneficiaries as published with open access, a moderate increase compared with Horizon 2020 at the same stage (69.8%). The programme continues to support excellent science: between 1985 and 2023, it supported 35 Nobel Prize winners, two more than was reported in the *ex post* evaluation of Horizon 2020. It strengthens human capital in research and innovation by boosting researchers' skills and providing unique career development opportunities.

Horizon Europe played a key role in mobilising additional R&I funding and it contributed to the EU's target of investing 3% of GDP in R&D. It offered opportunities for European businesses and research organisations to forge partnerships with other entities in Europe and beyond, fostering economic growth. Nevertheless, Horizon Europe investments only accounted for about 10% of public R&D expenditure in the EU; the rest of the funding comes from the Member States and regional bodies. While this investment in innovation is crucial for productivity, there are other factors at play such as the macroeconomic environment, property right enforcement, openness to trade, effective government, and properly regulated markets.

The programme is **effectively contributing to the twin transition**: its climate contribution was 35% of its funding by the end of 2023 – on track to reach the legal target, which was not achieved in Horizon 2020. Spending on biodiversity objectives exceeds the target level for 2024: 8.7% in 2023 (compared with the 7.5% target). Horizon Europe investments in the digital transformation for 2021-2023 are estimated to be at 33% of its budget (compared with 32% in Horizon 2020). The programme combines agility and long-term competence building in strategic areas for the Digital and Industrial Transition. The systemic and “technology neutral” approach enhances its capacity to deliver integrated solutions to complex challenges in this field.

Three macro-economic models used in this evaluation confirm that **Horizon Europe contributes to EU's GDP growth, according to expectations**. The limited share of Horizon Europe funding that has been allocated in the first three years of the programme is estimated to contribute to an increase in EU GDP of up to EUR 8.1 billion yearly between 2021 and 2050, on average.

**10 077 SMEs received grants for a total of EUR 7.4 billion** (17% of all the budget allocated). Pillar II involves 70% of all SME unique participants and provides 68% of all EU contribution for SMEs (EUR 4.7 billion). Approximately 15% of the joint undertakings' funding went to SMEs. In Pillar III, 32% of all EU contributions went to SMEs. In addition to this, the EIC Fund's approved equity investments for start-ups and SMEs add another EUR 1.7 billion for SMEs in the Horizon Europe period, bringing the total investment to EUR 9.1 billion.

Horizon Europe has tripled the budget for **widening** participation to 3% of the programme budget (compared with its predecessor Horizon 2020) and introduced several measures to increase the participation of organisations from widening Member States in the programme. First results of this increased focus on widening are positive both in terms of participation and the number of newcomers. The Horizon Europe Widening Member States have received 14% of the funding to

date, compared with 9% of the total funding they received in Horizon 2020. The rate of newcomers in widening Member States is 53%, which is greater than in non-widening ones (49%). In addition, 58% of collaborative projects include a participant from a widening Member State.

The **EU Missions** are proceeding towards their goals despite a cumbersome governance system and an incomplete monitoring framework for reporting on their progress.

**Institutionalised European partnerships had an impact** on the creation and diffusion of new high-quality knowledge and skills, as well as on the EU's global leadership and value chain resilience in key technologies. A smaller number of JUs had an impact on developing and accelerating the uptake of innovative solutions. **The partnerships' transparency and openness improved**, although SMEs and participants from widening countries still face some challenges. The number of new organisations involved in the partnerships slightly increased from 2022 to 2024: most of the 308 new organisations were associated with the EIT KICs, while other institutionalised partnerships had few newcomers. The share of SMEs members increased more than that of universities and private organisations between 2022 and 2024, primarily thanks to participation in the EIT KICs. Only three JUs disclosed SMEs as members: SNS, Clean Aviation, Single European Sky. Participation from widening countries has improved, but some partnerships still struggle to attract organisations from Central and Eastern Europe.

**In addition to the EIT KICs who all prepared their phasing-out strategies to become financially sustainable after 15 years, three European partnerships have produced a phasing-out plan.** Among the institutionalised partnerships, EIT InnoEnergy, EIT Digital, and EIT Climate-KIC reached the end of their partnership status in December 2024 and are continuing their activities as financially sustainable ecosystems with less EIT funding.

The **programme's internal coherence is hindered by a high number of instruments, which nevertheless achieve a broad TRL coverage (including low TRLs in Pillar II).** In Pillar II, there are three impact-oriented streams of activities under way (the EU Missions, European Partnerships and clusters), each with its own governance and often weak links between themselves (in particular between the Missions and partnerships). In Pillar III, there is overlap in support provided by the EIC, EIE and EIT in terms of activities, TRL levels covered and groups targeted – each with its own governance.

**The overall landscape of EU programmes supporting innovation and deployment of research is increasingly complex and difficult to navigate for the beneficiaries targeted.** Horizon Europe is pursuing synergies with 20 EU programmes – up from 13 at the time of the *ex post* evaluation of Horizon 2020. Developing synergies is labour-intensive: the Commission made efforts in work programme coordination, the development of new support actions and a guidance notice (ERDF), and monitoring bridging instruments and bonus points in project evaluation. Existing synergy tools have been more widely deployed (Seal of Excellence) and strengthened (combined funding under Teaming projects). New mechanisms such as transfers from national ERDF programmes to Horizon Europe have been used in two instances. Cumulative funding exists with Member States using their ERDF funds as contributions to European Partnerships. EU programmes have different programming cycles and timelines, which create challenges for coordination.

The **co-creation approach** was introduced in Horizon Europe to foster synergies with EU policies and programmes. A wide range of Commission departments, Member States and the European Parliament, as well as representatives from industry participate in setting priorities and the budget allocation, through complex governance arrangements.



The **Seal of Excellence** continues to facilitate synergies with national and regional programmes: it was awarded to 7 166 proposals that could not be funded due to budget limitations in 2021-2024.

#### *What costs are borne by the beneficiaries and applicants?*

**Beneficiaries' administrative costs:** Beneficiaries are expected to spend **between EUR 4.75 billion and EUR 6.47 billion** on administrative costs on projects signed under Horizon Europe so far over the project lifetime. This is equivalent to 9% - 12% **of the total project cost**. The interim estimate is an order of magnitude higher than the previous (non-robust) estimate for all of Horizon 2020. The difference should not be interpreted as a change in costs but is primarily due to improvements in data quality and survey question design.

**Costs of applicants:** Overall, stakeholder feedback signals there has been no substantial shift in the proposal preparation effort required to apply for Horizon Europe compared to Horizon 2020.

Results of the evaluation's large, targeted survey suggest that consortium coordinators and mono-beneficiaries typically spend **between 36 to 45 person-days on a proposal**, in addition to the **16 to 25 person-days** typically spent by consortium partners. **Consortium size** is a dominant factor influencing the time cost of coordinators.

**So far, the application costs of all applicants to Horizon Europe are estimated to add up to EUR 1.92 billion to EUR 2.82 billion.** This estimate is based on Horizon Europe's committed operational expenditures up to 2024, therefore not covering the entire programme. It corresponds to an **average cost per proposal of EUR 21 000 to EUR 32 000**, compared with an estimate of EUR 18 000 to EUR 37 000 under Horizon 2020. Our level of confidence in the Horizon Europe estimate is higher than in that of the Horizon 2020 final evaluation. The difference between the estimates for the two programmes should not be interpreted as an underlying change in costs but is due to an improvement in the quality of evidence and estimation method.

**The overwhelming majority (74-80%) of Horizon Europe proposals reaching the quality threshold have been written without the involvement of external consultancies.** Well over half of Horizon Europe applicants received support to prepare their proposals from a range of sources, primarily from **specialised departments in the organisation** (51%), the **National Contact Points** (19%) and **consultancy firms inside or outside the consortium** (17%). Around 30% of the respondents indicated that they had not used any source of support.

**Time-to-Grant target:** Horizon Europe without the EIC reaches a TTG of 241 days (240 days when excluding EIC Accelerator only), staying below the performance of Horizon 2020 without the SME Instrument (209 days) but still on the target. While the average time-to-grant period is longer than under Horizon 2020, Horizon Europe's performance is meeting the target of 245 days for all programme parts to which it applies.

Horizon Europe's **public sector Benefit Cost Ratio (BCR)** suggests the programme generates **value-for-money** for the EU: **One euro of costs to society associated with the programme is estimated to bring about 5 to 6 euros of benefits for EU citizens (measured through GDP impact) in the period up to 2045.**

#### *What were the results of the simplification efforts?*

**Simplification of the Partnership landscape:** The number and types of partnerships were significantly reduced, from 120 partnerships in Horizon 2020 down to 60 in Horizon Europe.

**Beneficiaries of lump sum grants** (excluding ERC Proof of Concept grants) are estimated to **typically save between 96 and 128 person-days per grant**, as financial reporting documents no longer have to be submitted. ERC Proof of Concept lump sum beneficiaries typically save 6



to 8 person-days per grant. In addition, beneficiaries of **larger lump sum grants save the cost of a certificate on the financial statements (CFS)**, which typically costs **EUR 4 500**.

At interim evaluation stage, only considering the grants that have been signed to date, **lump sum funding is estimated to already have secured savings for beneficiaries of between EUR 49.8 million and EUR 63.4 million** over their projects' lifetime (incl. ERC PoC). This is equivalent to 1.6% - 2.1% of the total grant value of lump sum grants and 14% - 30% of lump sum beneficiaries' administrative costs. The use of lump sum funding under Horizon Europe is scheduled to broaden and pick up speed in the coming years. **The potential for future simplification from lump sum funding** in the remaining years of Horizon Europe is expected to **add EUR 276 million to EUR 351 million in reporting burden reduction**.

The **blind evaluation of proposals** was proven to be feasible within the legal framework and the operational context of the R&I framework programme.

A reformed approach to the **ethics appraisal process** has brought simplifications for a large share of the proposals submitted to Horizon Europe.

The implementation of **monitoring and reporting** provisions in the Horizon Europe Regulation is partially complete. A single database (CORDA) exists and includes implementation data for all parts of the programme. Nonetheless, the central database remains incomplete in several aspects, including the EIC Accelerator and European Partnerships, because of technical issues linked to the implementation of new instruments and slow integration of data for actions managed outside of Commission IT systems. This affects the calculation of success rates and other programme statistics.

#### *How has Horizon Europe made a difference so far?*

**Horizon Europe supports research that could not be funded at national/regional level**, in particular collaborative actions in Pillar II involving multiple organisations from different countries, more than would be possible at national or regional level. Under Pillar I, projects support international cooperation and mobility opportunities for researchers, access to world-class research and technology infrastructures, and a drive for excellence through EU-wide competition for research funding. Horizon Europe also supports research topics and areas not covered by national and regional R&I funding programmes or where European-level action adds value in helping solve global challenges.

Additionally, the scale of Horizon Europe support is generally greater than national and regional funding: applicants that were unsuccessful in Horizon Europe and went on to look for additional funding had to reduce the scope and ambition of their projects. With its partnerships and participation in global consortia, the programme also aligns the R&I landscape in the EU and even globally, preventing duplication and addressing fragmentation by setting common strategic research agendas.

**Horizon Europe brings co-investment from participants in research and innovation.** To date, project participants have invested a total of EUR 10.2 billion of their own resources in Horizon Europe projects. Each euro the EU is investing in Horizon Europe R&I projects directly attracts additional R&I investments of about EUR 0.24 (almost the same as in Horizon 2020). This factor is higher for private for-profit entities: with each euro of EU contribution, Horizon Europe leveraged around EUR 0.5 in co-investment. European Partnerships, introduced to pool and align resources, have helped to increase the leverage effect of EU R&I investment and have a leverage factor of over 0.6 (EUR 7 billion as of December 2024). However, most JUs need additional activities to reach or approach an equal contribution between the EU and partners (leverage factor of 1) as private co-investment in call activities is usually not enough to match the contribution of the EU.

In European Partnerships, additional activities are activities that are not directly funded by the EU, but align with and contribute to the partnerships' objectives. Institutionalised partnerships, such as the EIT KICs and JUs, have the highest leverage factor when these activities are included, especially looking at the longer standing ones (2.83 for the first three KICs set up in 2010, and 1.76 for older JUs and Article 185 partnerships). When aggregated, additional activities constitute by far the largest source of leverage of partnerships.

The Innovative Health Initiative and EDCTP3 reported financial contributions from JU members to project activities, making 'cash' contributions to R&I expenditures. All other JUs reported that financial contributions from partners were used exclusively to cover administrative costs. This means that their cash contributions funded the running of JUs but did not contribute to the budget for the calls for proposals.

### *Three years in, does Horizon Europe remain relevant?*

**The relevance of Horizon Europe is confirmed**, as private and public sector investment in R&D remains a necessary condition for strengthening Europe's competitiveness. With the framework programme's increased budget, the average success rate of proposals increased from 12% in Horizon 2020 to 16.4% in Horizon Europe. However, only 30.1% of the high-quality proposals could be funded with the available budget - an additional EUR 81.77 billion would have been needed in 2021-2024 to fund them all.

In addition, Horizon Europe showed its relevance in **responding to emergencies and changing priorities**, such as the COVID-19 pandemic and the Russian invasion of Ukraine. The first Horizon Europe call tackled the COVID-19 pandemic. Programme parts across all Horizon Europe pillars directed funding and initiatives to COVID-19 and coronavirus research and support for researchers from Ukraine.

**The valorisation of R&D outputs remains a challenge**: only about one-third of the patented inventions registered by European universities or research institutions are commercially exploited. The financing gap between the EU and the US is observed at all stages of development but remains more prominent in the scale-up phase. In Horizon 2020, there was a gap during the EIC Pilot stage for TRL 3-6 support as the EIC Launchpad Pilot offered only relatively small grants for bridging the 'valley of death' for organisations looking to commercialise the outputs of their research. The Transition instrument fills this gap and enabled the EIC to cover the entire TRL scale. Only the EIC Accelerator offers direct equity investment in companies with options for grant, blended finance (grant and equity) or equity-only support – this is where the EIC is unique in the framework programme. The EIT KICs are also developing innovative products and services, starting and supporting new companies. The EIT's involvement in Academies is a unique support for skills building and learning, which does not exist in other Innovative Europe programme parts. The EIT is also distinct in the sense that it is present 'on the ground' in all Member States and thus offers direct support.

**International cooperation** in research and innovation plays a key role for European competitiveness, building and making use of partnerships around the world. Through improved reciprocity clauses, Horizon Europe opens access to resources, know-how and scientific excellence that are developing outside the EU.

**Gender equality** continues to be strengthened in the programme: the 50% political commitment relating to the share of women participating in advisory and expert groups was recently met and currently stands at 51% (up from 43% in Horizon 2020). The share of women in expert evaluation panels stands at 45%, (up from 42% but still below the 50% target). The share of project coordinators who are women increased from 24% in Horizon 2020 to 31% in Horizon Europe, while the share of researchers still hovers at 38%. These results correspond to the under-

representation of women in senior academic and decision-making positions in the EU generally. However, the programme exceeds the EU average share of women researchers (34%).

Horizon Europe changed the approach to social sciences and humanities (SSH) from a cross-cutting issue to requiring all projects to take these disciplines into account when appropriate. In addition, the Commission launched dedicated SSH calls for proposals. The evaluation could not draw a conclusion on these efforts as the first monitoring report on SSH in Horizon Europe will be published in 2025.

## 5.2 Lessons learned

The final evaluation of Horizon 2020 identified the need to broaden participation in the programme. This interim evaluation of Horizon Europe noted increased participation in widening Member States, as well as more SMEs in some European Partnerships.

The final evaluation of Horizon 2020 flagged the need to **monitor the framework programme's contribution to EU priorities and competitiveness**. The Key Impact Pathway data for short-term indicators is reported in this evaluation SWD for the first time. For future publications and the final evaluation, the medium- and long-term indicators should also be developed and reported on. Efforts to complete the central database with data on all programme parts should continue. In addition, more attention could be paid to the monitoring and evaluation of expected effects outlined in work programmes. The lack of results indicators and targets makes it difficult to assess their contribution to addressing global challenges and European industrial competitiveness.

The **new approach taken to strategic planning and programming in Horizon Europe**, as well as the impact orientation of the programme and projects, made the process more participatory through co-creation and added new requirements in the application forms. In the future, any new layers of decision-making and engagement in programming could be preceded by a simplification of existing complex governance arrangements.

It is useful to **include emergency provisions in work programmes**, as was done by cluster 1 on health. Inclusion of emergency provisions could be considered in other parts of the programme.

Additional efforts could also **improve the monitoring of European Partnerships** as data consistency and quality varies greatly across different types of Partnerships and is affected by significant lags and inconsistencies. Integration of proposal and grant management tools of partnerships in the IT systems used for the rest of the programme should become a precondition for the launch of institutionalised and co-funded partnerships: alternative approaches have resulted in severe reporting lags and considerable administrative burden. The monitoring of in-kind contributions to partnerships – both to operational activities and as additional activities – could be improved. This would enable an assessment of whether these are already ongoing activities or planned activities of the partners and whether they create additional value, such as increased qualified employment or investment in upgrading production systems and deploying solutions. Moreover, the full list of members should be published and kept up to date by JUs and co-programmed partnerships, enabling an independent assessment of the extent to which partners are meeting their legal obligations on contributions to research activities.

The **partnerships' leverage effect** could increase if private investments were incentivised within the framework of existing partnerships in favour of concrete steps towards deployment. This could be done by using lower funding rates, which would, for example, ensure that more private funding would be put into demonstrator projects. However, expectations for leverage concern the phase after the projects are funded, the use of private investments for deployment, and other

closely related activities (such as skills and the development of standards). This follow-up phase cannot be monitored adequately at present: due to confidentiality concerns, little is known about the extent of these additional activities, which are not necessarily linked to the funded projects. Micro-level data should be collected on the contribution of Member States and international organisations to JUs and co-funded partnerships, especially the extent to which this contribution originates from shared management EU programmes, such as cohesion funds and the RRF.

**EU Missions** were designed as an impact-oriented new instrument in the programme's policy mix. The Horizon Europe Regulation called for the Missions to 'be targeted, measurable and time-bound and have a clear budgetary envelope' and 'impact-driven, but [have] realistic goals and on research, development and innovation activities'. Due to the monitoring framework shortcomings, it has been challenging for this evaluation to draw conclusions on Missions' progress towards their goals and the extent to which their goals were realistic in the relative short time available for implementation (2021-2030) and given their budgetary allocation (10% of the clusters' budget).

To prepare for the Horizon Europe final evaluation, all Missions could finalise their monitoring and evaluation frameworks, building on the drafts available in the implementation plans.

- Mission Cancer: explain which workstreams count to meeting the goal of 3 million people whose lives have been improved and how these will be reported and aggregated, while minimising any risk of double counting.
- Mission Ocean and Waters: progress on the assessment of the outcomes and impacts of Mission activities (notably Horizon Europe-funded projects) with respect to the Mission specific objectives and targets, as well as considering evolving policy priorities (Ocean Pact, Water Resilience Strategy).
- Mission Soil: the transition to healthy soils by 2030 should be assessed using the indicators monitored in the EU Soil Observatory Dashboard – across the whole EU territory and in the specific areas where the Mission is more active. The Mission should also draw up an approach for monitoring the contribution of its living labs and lighthouses to soil health changes.
- Mission on Climate Adaptation: publish an operational definition of 'climate resilient' regions, providing guidance on what is a climate-resilient region together with a report that can monitor progress to the Mission's goal. The Mission should also identify indicators that will enable the monitoring and aggregation of the key changes that we expect will be observed in these cities (i.e. a reduction of CO2 emissions and other effects).
- Mission Cities: define how and when the assessment of cities carrying the Mission label is conducted and where the number and list of Climate-Neutral and Smart Cities will be published.

Data on funding leveraged by EU Missions was not available for this evaluation. In the future, the Missions could jointly agree on the methodology for monitoring the 'mobilisation of the resources and leverage of additional public and private funds required to deliver their outcome', which is set out in the Horizon Europe Regulation. This could focus on resources and funds that would not have been invested in the set goals without the EU Mission, in order to assess their added value in the final evaluation.

In the field of **efficiency**, the evaluation confirms the finding of the *ex post* evaluation of Horizon 2020 that there is a potential for efficiency savings through reducing the effort and costs of applicants, as a large majority of applicants are unsuccessful.

The *ex post* evaluation of Horizon 2020 identified **dissemination and exploitation** as an area for improvement and it continues to be a challenge. The new Horizon Results Booster was launched in November 2024 to increase exploitation of Horizon Europe projects, including

through matchmaking events with potential investors. Its effectiveness should be monitored in the second half of Horizon Europe and assessed in the final programme evaluation. In particular, the IPR results of Horizon Europe projects will be monitored through the Key Impact Pathways during implementation and evaluated in the *ex post* evaluation of the programme.

At this stage, the lack of data on the deployment and uptake of Horizon Europe-funded R&I hampers the analysis. In relation to dissemination, exploitation and deployment, **stronger synergies** were also recognised as an important mechanism in the *ex post* evaluation of Horizon 2020. Despite specific efforts to create synergies and guide beneficiaries among the different EU programmes, this report indicates that the funding landscape is too complex. Member States could consider voluntary reporting on their funding of proposals that have been awarded a Seal of Excellence.

In **international cooperation**, multilateral activities should be further pursued with programme-level cooperation (e.g. International Rare Diseases Research Consortium, Global Research Collaboration on Infectious Diseases Preparedness for coordinating international sectoral policy development and implementation, as well as to create greater scale. Efforts could be targeted at specific countries (world leaders) and associated with stronger incentives for third-country participation (e.g. simplified rules, specific funding rates).

As recommended in the final evaluation of Horizon 2020, continued attention is needed to **support women in research and innovation**. This report notes that some improvements are visible, but gender balance has not yet been achieved. The effectiveness of gender equality plans (GEPs) could be further supported by facilitating development of compliance plans, and by strengthening enforcement by means of *ex ante* verification and regular *ex post* compliance checks.

Regarding integration of **SSH**, this could be assessed in more depth, in preparation for the final evaluation of Horizon Europe so as to identify root causes of limited integration in some cases and potential solutions. Moreover, certain actions could already be implemented, such as giving more visibility to the Net4Society NCP project<sup>547</sup> that supports SSH integration across Horizon Europe. The project does this by organising brokerages, trainings for NCPs, and highlighting SSH research funding opportunities beyond flagged topics in Horizon Europe.

Regarding **simplification**, the evaluation recommends to pilot changes to the programme implementation through the use of small but well-designed policy experiments, that follow best practice (e.g. use randomisation to set up a treatment and control group) and are accompanied by careful monitoring and analysis. These pilots can generate a robust evidence base that can then underpin decisions on simplification measures for the wider programme.

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<sup>547</sup> <https://horizoneuropencpportal.eu/cluster-2>



Brussels, 3.12.2025  
SWD(2025) 110 final/2

PART 2/21

## CORRIGENDUM

This document corrects document SWD(2025) 110 final, part 2/21, of 30.04.2025. P. 233 missing decimal point in “EUR 2.88 million”; missing notes under Tables 57, 64, 65; Table 57 incorrect column 10 in rows 32-33; Table 59 incorrect last 5 rows; Tables 61, 62 and 63 incorrect column 3, rows 12 and 19; Table 64 incorrect columns 7-9 and last 6 rows; Table 65 incorrect last column and last 6 rows.

The text shall read as follows:

## COMMISSION STAFF WORKING DOCUMENT

### EVALUATION

#### **Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024)**

#### *Accompanying the document*

#### **Communication from the Commission to the European Parliament and the Council**

#### **Horizon Europe: Research and Innovation at the heart of competitiveness**

{COM(2025) 189 final}

## **List of Annexes:**

|   |     |
|---|-----|
| Annex 1 Procedural information.....   | 2   |
| Annex 2 Methodology and analytical methods used .....   | 3   |
| Annex 3 Evaluation matrix .....   | 33  |
| Annex 4 Efficiency - underlying analysis and additional detail .....                                    | 43  |
| Annex 5 Stakeholder consultation .....  | 107 |
| Annex 6 Description of synergies, by programme .....  | 204 |
| Annex 7 European Partnerships: Leverage analysis .....  | 211 |
| Annex 8 Additional data on state-of-play, including for the European Partnerships and EU Missions ..... | 231 |
| Annex 9 Activities conducted to increase citizen and user engagement .....                              | 272 |
| Annex 10 Horizon Europe response to emergencies .....   | 274 |

## Annex 1 Procedural information

The interim evaluation of the Horizon Europe programme (Decide reference: PLAN/2022/785) has been developed under the lead of DG RTD, under the guidance of the interservice steering group (ISSG) composed of 29 DGs (AGRI, BUDG, CLIMA, CNECT, COMM, COMP, DEFIS, EAC, ECFIN, ECHO, EMPL, ENER, ENV, GROW, HOME, HR, IAS, INTPA, JRC, MARE, MOVE, NEAR, OLAF, OP, REGIO, SANTE, SG, SJ, TRADE) and 5 Executive Agencies (CINEA, EISMEA, ERCEA, HADEA, REA), established in April 2022.

Preparatory activities started in April 2022 when the ISSG met to discuss the expectations of participating services, the draft call for evidence, the draft consultation strategy and the working methods of the ISSG. Following this ISSG the call for evidence was then published in July 2022 for four weeks and received 54 individual replies (presented in Annex 5). The ISSG met again in October 2022 to discuss the feedback received on the call for evidence and the draft questionnaire for stakeholder consultation.

The stakeholders' consultation was launched on 1 December 2022 and closed on 19 February 2023, having gathered 1663 replies for questions on Horizon Europe. This was followed by an online public event which was held on 29 June 2023 to complement the public consultation process on key themes that emerged prominently in the survey results namely: proposal preparation and project implementation in Horizon Europe, the balance between low and high TRLs across Horizon Europe as well as the Horizon Europe's novelties.

After the *ex post* evaluation of Horizon 2020 was completed and published in January 2024<sup>1</sup>, the ISSG met that June to discuss the planning of the interim evaluation of Horizon Europe. In October 2024, the ISSG members provided comments on the first draft of the SWD. After addressing these comments and finalising the individual partnership evaluation reports, the full package of documents was shared with the ISSG for final comments in December 2024-January 2025. The Horizon Europe Executive Committee was consulted at the same time.

The final inter-service consultation took place between 12 and 25 March 2025.

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<sup>1</sup> [https://research-and-innovation.ec.europa.eu/strategy/support-policy-making/shaping-eu-research-and-innovation-policy/evaluation-impact-assessment-and-monitoring/horizon-2020\\_en](https://research-and-innovation.ec.europa.eu/strategy/support-policy-making/shaping-eu-research-and-innovation-policy/evaluation-impact-assessment-and-monitoring/horizon-2020_en)

## Annex 2 Methodology and analytical methods used

The interim evaluation of Horizon Europe was coordinated by the Common Programme Analysis & Regulatory Reform Unit of the Commission's Directorate-General for Research & Innovation, with the support of: (i) a working group (the 'MEAVE' - Impact Monitoring, Evaluation and Analysis Virtual Entity) gathering together the R&I family DGs and Executive Agencies; (ii) and an interservice steering group comprising relevant Commission DGs. The interim evaluation of Horizon Europe started in 2023 and builds on: (i) a large amount of quantitative and qualitative evidence collected through a variety of methods described below; and (ii) a thorough evaluation analysis, applying triangulation of evidence from different sources, ensuring an objective and robust assessment.

### Main data sources

The scope of the Horizon Europe interim evaluation covers 15 148 signed projects that closed as of 6 January 2025. Section 3 of the SWD provides data on how the situation evolved during the evaluation period since Horizon Europe was launched in April 2021 until 6 January 2025. Section 4 of the SWD provides the evaluation findings based on triangulation of evidence predating January 2025 (most external evaluation studies were carried out during 2023-2024, with programme data extracted in June/July 2023).

The analysis was based on the following data sources:

- The main source of data for the evaluation is the Common Research Data Warehouse (CORDA) Portal. The portal gathers data collected through different Commission tools, including policy monitoring at work programme level, data collected at proposal stage, grand agreement preparation and through continuous project reporting.
- Beyond CORDA, additional data were used. This was also to have comprehensive data on the whole framework programme, in particular for the EIC, different partnerships and missions (such as the EIC Impact Report<sup>2</sup>, Biennial monitoring report<sup>3</sup> on partnerships in Horizon Europe, External assessment reports<sup>4</sup> of the EU Missions, the Commission Communication<sup>5</sup> and Staff Working Document<sup>6</sup> on the assessment of EU Missions two years on, a report<sup>7</sup> of the expert group on monitoring of EU Missions, and an assessment<sup>8</sup> of JRC by a panel of independent experts).

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<sup>2</sup> EISMEA, Scaling Deep Tech in Europe – the European Innovation Council Impact Report 2025, [https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f\\_en?filename=EIC-Impact-Report-2025.pdf](https://eic.ec.europa.eu/document/download/7b947b36-66cb-4471-a2d0-158d5ae6770f_en?filename=EIC-Impact-Report-2025.pdf)

<sup>3</sup> European Commission, [Performance of European partnerships – Biennial monitoring report 2024 on partnerships in Horizon Europe](#), Publications Office of the European Union, 2024

<sup>4</sup> Janssen, M. and Schiele, J., [Mission A Soil Deal for Europe assessment report](#), Angelis, J. and Boski, I., [Cancer Mission assessment report](#), Kaufmann, P. et al., [Mission Climate-neutral and smart cities assessment report](#), Grinieć, E. and Rantcheva, A., [Mission Restore our Ocean and Waters assessment report](#), Nauwelaers, C. and Phillips, C., [Mission Adaptation to Climate Change assessment report](#), Publications Office of the European Union, 2023

<sup>5</sup> COM(2023) 457

<sup>6</sup> SWD(2023) 260

<sup>7</sup> Karo, E., Barajas, A., Sarvaranta, L., Antoniou, L. et al., [Commission Expert Group to support the monitoring of EU missions – Final report](#), Publications Office of the European Union, 2024

<sup>8</sup> European Commission, [Interim evaluation of the activities of the Joint Research Centre under Horizon Europe and Euratom 2021-2025 – Final report of the evaluation panel](#), Publications Office of the European Union, 2023

- Evidence and analysis conducted in the ex-post evaluation of Horizon 2020<sup>9</sup> and the Commission Expert Group on the Interim Evaluation of Horizon Europe.<sup>10</sup>
- External datasets such as Scopus<sup>11</sup>, Orbis<sup>12</sup>, PATSTAT<sup>13</sup>, Crunchbase, Dealroom, Technote, MAG/OpenAlex, PlumX, Overton, NamSor, and Unpaywall.
- Monitoring reports<sup>14</sup> of Horizon Europe and statistical data mainly from the Commission's internal IT Tools (Horizon Dashboard), as well as Eurostat/OECD data and Horizon Europe Performance Statement.<sup>15</sup>
- Extensive quantitative and qualitative analyses on specific aspects and objectives of Horizon Europe, conducted through five external evaluation studies (with multiple reports each) by independent evaluation experts, selected using a transparent process and overseen by relevant Commission services.

Five studies covered the different impact areas of the programme:

1. Evaluation study on **Excellent science in the European framework programmes for research and innovation** – interim evaluation support study, 2024, <https://data.europa.eu/doi/10.2777/2295765>
2. **Horizon Europe and the Green Transition** – Interim evaluation support study, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2777/67934>
3. Evaluation support study on **Horizon Europe's contribution to a resilient Europe**, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2777/797281>
4. **Horizon Europe and the digital & industrial transition** – Interim evaluation support study, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2777/845650>
5. Evaluation study of the **European framework programmes for research and innovation for an innovative Europe** – support study for the interim evaluation of Horizon Europe, Publications Office of the European Union, 2024, <https://data.europa.eu/doi/10.2777/499132>
6. **Synthesis study** summarizing the findings on **programme coherence and synergies** from these five impact area studies, while providing updated e-grants data analysis: Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/5616419>

The above-mentioned five studies included individual reports on the evaluation of institutionalised partnerships:

1. **Clean Aviation JU**: <https://data.europa.eu/doi/10.2777/403632>
2. **Circular Bio-Based Europe JU**: <https://data.europa.eu/doi/10.2777/636121>
3. **Clean Hydrogen JU**: <https://data.europa.eu/doi/10.2777/577004>
4. **Europe's Rail JU**: <https://data.europa.eu/doi/10.2777/3737899>
5. **The Global Health EDCTP3 JU**: <https://data.europa.eu/doi/10.2777/555121> (and its predecessor, the second European and Developing Countries Clinical Trials Partnership Programme (EDCTP2): <https://data.europa.eu/doi/10.2777/017474>)
6. Interim evaluation of the **innovative health initiative (IHI)** and final evaluation of the **innovative medicines initiative (IMI2)**: <https://data.europa.eu/doi/10.2777/918737>
7. **The Single European Sky JU**: <https://data.europa.eu/doi/10.2777/7895247>
8. **EIT Urban Mobility**: <https://data.europa.eu/doi/10.2777/9939305>
9. **EIT Climate-KIC**: <https://data.europa.eu/doi/10.2777/1601692>

<sup>9</sup> SWD (2024) 29

<sup>10</sup> European Commission, [Align Act Accelerate – Research, technology and innovation to boost European competitiveness](#), Publications Office of the European Union, 2024.

<sup>11</sup> <https://www.scopus.com/search/form.uri?display=basic#basic>

<sup>12</sup> <https://login.bvdinfo.com/R1/Orbis>

<sup>13</sup> <https://www.epo.org/en/searching-for-patents/business/patstat>

<sup>14</sup> [SME participation in Horizon Europe](#) (2024), [Country participation in the EU R&I FPs](#) (2024), [Fostering gender equality](#) (2025), [EU Missions](#) (forthcoming 2025)

<sup>15</sup> Horizon Europe Performance Statement, retrieved 07/10/24 from [Horizon Europe - Performance - European Commission \(europa.eu\)](#)



10. **EIT Food:** <https://data.europa.eu/doi/10.2777/3661526>
11. **EIT InnoEnergy:** <https://data.europa.eu/doi/10.2777/5626827>
12. **EIT Health:** <https://data.europa.eu/doi/10.2777/049770>
13. **EIT KIC Manufacturing,** <https://data.europa.eu/doi/10.2777/58516>
14. **EIT KIC Raw materials,** <https://data.europa.eu/doi/10.2777/85259>
15. **EIT KIC Digital,** <https://data.europa.eu/doi/10.2777/431739>
16. **Key Digital technologies (Chips) JU,** <https://data.europa.eu/doi/10.2777/71518>
17. **Smart networks and services JU,** <https://data.europa.eu/doi/10.2777/17621>
18. **The European Metrology Programme,** <https://data.europa.eu/doi/10.2777/39988>
19. **Euro HPC,** <https://data.europa.eu/doi/10.2777/561873>

In addition, there were shorter individual evaluation reports on 20 co-programmed and co-funded partnerships which do not have a legal obligation for evaluation:

1. **European Partnership on Transforming Health and Care Systems (THCS)** <https://data.europa.eu/doi/10.2777/140226>
2. **ERA for Health,** <https://data.europa.eu/doi/10.2777/053085>
3. **European Partnership on the Assessment of Risks from Chemicals (PARC)** <https://data.europa.eu/doi/10.2777/001851>
4. **Artificial Intelligence, Data and Robotics,** <https://data.europa.eu/doi/10.2777/057832>
5. **Made in Europe,** <https://data.europa.eu/doi/10.2777/334596>
6. **Photonics Europe,** <https://data.europa.eu/doi/10.2777/711691>
7. **Process4planet,** <https://data.europa.eu/doi/10.2777/324548>
8. **European partnership for batteries (BATT4EU),** <https://data.europa.eu/doi/10.2777/1965736>
9. **Clean steel partnership,** <https://data.europa.eu/doi/10.2777/2978548>
10. **Towards zero-emission road transport (2ZERO),** <https://data.europa.eu/doi/10.2777/2828415>
11. **People-centric Sustainable Built Environment (Built4People),** <https://data.europa.eu/doi/10.2777/6054686>
12. **Zero-emission waterborne transport,** <https://data.europa.eu/doi/10.2777/2538595>
13. **Connected Cooperative Automated Mobility (CCAM),** <https://data.europa.eu/doi/10.2777/2675321>
14. **Water4all: Water security for the planet,** <https://data.europa.eu/doi/10.2777/0349316>
15. **Clean Energy Transition,** <https://data.europa.eu/doi/10.2777/2130749>
16. **Driving urban transitions to a sustainable future (DUT),** <https://data.europa.eu/doi/10.2777/7146788>
17. **European Biodiversity Partnership (Biodiversa+),** <https://data.europa.eu/doi/10.2777/9001288>
18. **A climate neutral, sustainable and productive Blue Economy,** <https://data.europa.eu/doi/10.2777/1846443>
19. **Eurostars-3,** Part of the co-funded European partnership “Innovative SMEs”, <https://data.europa.eu/doi/10.2777/308203>
20. **European Open Science Cloud (EOSC) Association,** <https://data.europa.eu/doi/10.2777/7356844>

- Data from other EU institutions, such as the Council Conclusions<sup>16</sup> on the Ex-post Evaluation of Horizon 2020, relevant Court of Auditors’ reports, and reports/evaluations of the European Economic and Social Committee.<sup>17</sup>
- Input from the public consultation<sup>18</sup> on the Horizon Europe interim evaluation. This consultation received input from 1 663 respondents and 136 position papers.

<sup>16</sup> [The ex-post evaluation of Horizon 2020 and future outlook](#) - Council conclusions, 23 May 2024

<sup>17</sup> [European Economic and Social Committee exploratory opinion](#): results and experiences of efforts to close the innovation gap in the EU in the light of Horizon 2020 and Horizon Europe; [European Economic and Social Committee recommendations](#): interim evaluation of Horizon 2020.

<sup>18</sup> [Horizon Europe – interim evaluation \(europa.eu\)](#)

Detailed descriptions of the models and methods used in the different information sources mentioned above are available in each respective external study and internal analysis report. Below is a short overview.

## **Main methods used**

### *1. Macroeconomic modelling*

Measuring the full impact of R&I, i.e. capturing indirect effects on top of direct ones, is an intricate question, compounded by the often relatively long-time lags between policy initiatives and observed actual impacts. The European Commission uses complementary modelling platforms for both the ex-ante and ex-post evaluations of research and innovation policies. In this annex, macroeconomic modelling is used to quantify the economic impact of Horizon Europe in terms of GDP gain and job creation in the EU. While there is consensus that R&I is an important factor in increasing productivity, quantifying the impact of R&I policies at macroeconomic level requires modelling tools that accurately capture how R&I translates into economic gains.

There are several models available to assess the dynamic transmission channels of R&I, each with specific features. This interim evaluation uses results produced by three macroeconomic models: NEMESIS, RHOMOLO and FIDELIO. This is an interim assessment in the sense that the input data on the Horizon Europe investments are preliminary and do not yet reflect the actual disbursements during the programming period. However, the results should not be regarded as a way to exactly track and monitor the actual macroeconomic impact of the Horizon Europe interventions. This is because they rely on assumptions both on the modelling setup and on the simulation strategy adopted to simulate the investments' impact (i.e. the economic channels activated by them). NEMESIS and RHOMOLO models are publicly available in the European Commission's modelling inventory and knowledge management system (MIDAS)<sup>19</sup>, which includes, among other things, details on model structure and approach, model inputs and outputs, and spatial-temporal resolution and extent. MIDAS is managed by the Commission's Joint research Centre (JRC).

Results from NEMESIS were produced by a team of external experts, while RHOMOLO and FIDELIO results were produced by European Commission departments (the Joint Research Centre). The strength of these models lies in their distinct features. NEMESIS is considered one of the richest models covering different types of innovation and their spillovers in the economy. RHOMOLO is the most suitable model to address the geographical concentration of innovative activities and analyse regional impacts of R&I, as it models regional economies. FIDELIO tracks the indirect and induced effects across all agents, countries, and detailed industrial sectors of the economy and is therefore the most effective model to analyse sectoral impacts.

#### **1.1. NEMESIS**

##### *Presentation of the model*

NEMESIS was developed by a European consortium<sup>20</sup> in 2000 to analyse the macro-sectoral impacts of EU policies, based on R&D investments and related knowledge spillovers. The model

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<sup>19</sup> <https://web.jrc.ec.europa.eu/policy-model-inventory/>

<sup>20</sup> Lab. ERASME / Ecole Centrale Paris (now SEURECO), Federal Planning Bureau of Belgium, E3M3 lab. / ICCS /NTUA and Chambre d'Industrie et de Commerce de Paris.

became a reference tool for assessing EU and national R&I policies, and since 2004 has been used by the European Commission for several analyses. These include the assessments of: (i) the Lisbon Strategy target of 3% of EU GDP to be invested in R&D<sup>21</sup>; (ii) the RTD national action plan related to the Barcelona Objective<sup>22</sup>; and (iii) the impact of European R&I programmes (*ex-ante* assessment of the 7th Framework Programme<sup>23</sup>, of Horizon 2020<sup>24</sup>, and of Horizon Europe<sup>25</sup>).

### *Structure of the model*

NEMESIS is a macro-econometric model comprising detailed sectoral models for every EU country. The representation of technical progress in NEMESIS is derived from the new growth theories, where innovations result from the investment in R&D by private firms and R&D undertaken by the public sector. In its latest version, used for the ex-ante evaluation of the Horizon Europe programme in 2018<sup>26</sup> and for the ex-post evaluation of Horizon 2020 in 2023<sup>27</sup>, innovations still arise from private and public investments in R&D, but also from investments in two other complementary innovation inputs: ICT and Other Intangibles (including training and software). This improves the accuracy of assessing R&I policies by considering the most up-to-date theoretical and empirical findings of economic literature.<sup>28</sup> In that respect, NEMESIS is considered<sup>29</sup> the wealthiest model in terms of innovation types and policy elasticities compared to other standard macroeconomic models for R&D and innovation policies. Consequently, policy makers can design options for specific innovation types or channels using this model more easily.

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<sup>21</sup> Brécard, D., Fougereyrollas, A., Le Mouël, P., Lemiale, L. and P. Zagamé (2006), '[Macro-economic consequences of European Research Policy: Prospects of the NEMESIS model in the year 2030](#)', *Research Policy*, No 35(7), pp. 910-924.

<sup>22</sup> Chevallier, C., Fougereyrollas, A., Le Mouël, P., and P. Zagamé (2006), '[A time to sow, a time to reap for the European Countries: A macro-econometric glance at the RTD National Action Plans](#)', *Revue de l'OFCE*, 2006/5 (No 97 bis), pp. 235-257.

<sup>23</sup> Delanghe, H. and U. Muldur (2007), '[Ex-ante impact assessment of research programmes: The experience of the European Union's 7th Framework Programme](#)', *Science and Public Policy*, No 34(3), pp. 169-183.

<sup>24</sup> European Commission (2013), [The Grand Challenge – The design and societal impact of Horizon 2020](#), Directorate-General for Research and Innovation.

<sup>25</sup> European Commission, Directorate-General for Research and Innovation, (2018), [A new horizon for Europe: impact assessment of the 9th EU framework programme for research and innovation](#), Publications Office.

<sup>26</sup> European Commission, Boitier, B., Le-Mouël, P., Zagamé, P., Ricci, A., [Support for assessment of socio-economic and environmental impacts \(SEEI\) of European R&I programme – The case of Horizon Europe](#), Publications Office of the European Union, 2018; J. Ravet, B. Boitier, M. Grancagnolo, P. Le Mouël, L. Stirbat, and P. Zagamé, [The Shape of the Things to Come: Ex-ante Assessment of the Economic Impact of Horizon Europe](#). Journal for Research and Technology Policy Evaluation, Vol. 47, pp. 96-10, 2019

<sup>27</sup> European Commission, Naujokaitytė, R., Stančiauskas, V., Cakić, M., Délkutė, R. et al., [Evaluation study of the European framework programmes for research and innovation for an innovative Europe – Annexes – Phase 1](#), Denham, S.(editor), Publications Office of the European Union, 2023

<sup>28</sup> Le Mouël. [Macroeconomic evaluation of EU R&I Policies: Ways and Means](#). Economics and Finance. PhD thesis, Université Côte d'Azur, 2019; U. Akcigit, C. Benedetti-Fasil, G. Impullitti, O. Licandro, and M. Sanchez-Martinez. [Macroeconomic Modelling of Innovation Policy](#). Palgrave Macmillan, 2022

<sup>29</sup> Joint Research Centre: Institute for Prospective Technological Studies, Di Comite, F. and Kanacs, d., [Macroeconomic models for R&D and innovation policies](#), Publications Office, 2015

## Box 1: The innovation mechanisms in NEMESIS

Schematically, the innovation mechanisms at the level of a firm (or a sector) can be described as follows:

- Firms determine their investments in the three innovation inputs (private R&D, ICT and OI) depending on their relative costs and degree of complementarity.
- Firms' investment effort increases their knowledge (stock variable) and the knowledge of other firms and sectors nationally or internationally through the knowledge spillover matrices (knowledge transfers). For each innovation input, the knowledge stock is modelled as a weighted sum of the stock of assets, R&D, ICT or OI, belonging to all sectors and countries. The coefficients of the matrices used to build these stocks are calibrated based on patent citations between sectors and countries. These matrices combine the citations between patents allocated by technology classes and country with the OECD concordance table to allocate these citations **between sectors**<sup>30</sup>. **For R&D, the knowledge stock is also influenced by the public investments undertaken by the public sector.**
- The growth of the knowledge stocks will generate innovations at a rate that is a positive function of the knowledge absorption capacity of the firm (measured by its investment intensity in each innovation input).
- Innovations take two forms: product and process. Product innovations increase the intrinsic quality of the product the firm sells, whereas process innovations improve the production process without changing the product quality (pure TFP effect).
- Product innovations directly positively impact internal and external demands; innovations reduce production costs and, in the context of a competitive market, lower their market price and increase demand.
- These dynamics at the firm or sectoral level are brought together, at the macro level, by the input-output tables of the model, and the combination of the sectoral interdependencies ("bottom-up") with the "top-down" macro-economic forces impulses, finally, the medium- and long-term dynamics of the model.

### *Key assumptions for the interim evaluation*

There are three critical assumptions for the evaluation methodology:

1. **The programme's financing:** Does the evaluated Framework Programme rely on financing, or does the Framework Programme money come from "nowhere?"
2. **The direct crowding-in effect of the Framework Programme:** How much 1 EUR of Framework Programme will increase (decrease), i.e. crowd-in(-out), the R&I investments in the public and private organisations that receive this 1 EUR FP subsidy? Notably, besides this "direct" crowding-in effect of the Framework Programme on the R&D investments made by its beneficiaries, there is an "indirect" crowding-in effect, which refers to the additional R&D investments made by a research entity, financed by the

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<sup>30</sup> D.K.N. Johnson. [The OECD Technology Concordance \(OTC\): Patents by Industry of Manufacture and Sector of Use](#). OECD Science, Technology and Industry Working Papers, 2002.

Framework Programme or not, as a response to the modification of the overall economic activity that provokes the Framework Programme (and not as the direct result of the EC financial support, as with the direct crowding-in effect). The total crowding-in is, therefore, the sum of the direct and indirect crowding-in;

3. **The economic performance or European Added Value (EAV) of the Framework Programme:** How much the performance of the R&I investments provoked by the Framework Programme, in terms of R&I outcomes, is superior to those of the R&I supports from other sources of funding, and especially national ones. The assumptions are summarised in **Table 1** for the three cases ('Low', 'Medium' and 'High'). As in the ex-ante evaluation of Horizon Europe<sup>31</sup>, it is assumed that the Horizon 2020 programme was financed by an equivalent reduction of public investment at the EU level. The degree of reduction in public investment in each Member State is proportional to their historical contribution to the EU budget. Depending on the success of each Member State to benefit from the Framework Programme and their relative contribution to the EU budget, there are net contributors and net beneficiaries.

Table 1: Key assumptions of the NEMESIS model

| CASE   | Financing                                    | Direct effect  | Crowding-in | EAV  |
|--------|--|--|-------------|------|
| Low    | An equivalent decrease in public investments | Basic research: EUR 0<br>Appl. res.: +EUR 0.0<br>Average: +EUR 0.0     |             | +0%  |
| Medium |  | Basic research: EUR 0<br>Appl. res.: +EUR 0.15<br>Average: +EUR 0.0975 |             | +15% |
| High   |  | Basic research: EUR 0<br>Appl. res.: +EUR 0.35<br>Average: +EUR 0.2275 |             | +20% |

The three cases - for sensitivity ('Low', 'Medium', and 'High') - assume that there is no direct crowding-in and no direct crowding-out effect of the Framework Programme on basic research, the same assumption as in the ex-post evaluation of FP7<sup>32</sup> and the survey of the dedicated literature realised for the ex-ante assessment of Horizon Europe.<sup>33</sup> At the same time, the (direct) crowding-in effect of the Framework Programme on applied research and the EAV of the Framework Programme vary according to case. The 'Low' case uses conservative assumptions, no direct crowding-in effect of the Framework Programme for applied research, and no EAV compared to

<sup>31</sup> European Commission, Boitier, B., Le-Mouël, P., Zagamé, P., Ricci, A., [Support for assessment of socio-economic and environmental impacts \(SEEI\) of European R&I programme – The case of Horizon Europe](#), Publications Office of the European Union, 2018; J. Ravet, B. Boitier, M. Grancagnolo, P. Le Mouël, L. Stirbat, and P. Zagamé, [The Shape of the Things to Come: Ex-ante Assessment of the Economic Impact of Horizon Europe](#). Journal for Research and Technology Policy Evaluation, 2019, Vol. 47, pp. 96-10

<sup>32</sup> European Commission: Directorate-General for Research and Innovation, [Assessment of the Union added value and the economic impact of the EU Framework Programmes – Final report](#), Publications Office, 2017

<sup>33</sup> European Commission, Boitier, B., Le-Mouël, P., Zagamé, P., Ricci, A., [Support for assessment of socio-economic and environmental impacts \(SEEI\) of European R&I programme – The case of Horizon Europe](#), Publications Office of the European Union, 2018



national funding, delivering a low bound for evaluating the impacts. This ‘Low’ case uses similar assumptions to the ex-ante evaluation of Horizon Europe done by DG ECFIN with the QUEST III model.<sup>34</sup> For the ‘Medium’ case, the direct crowding-in effect of the Framework Programme on applied research is 0.15 EUR, following the median value from the literature review realised for the ex-ante assessment of Horizon Europe.<sup>35</sup> Economic performance, +0.15% for the EAV, has also been used by NEMESIS as a central assumption since the ex-ante impact assessment of Horizon 2020<sup>36</sup> and based on the evaluation of past FPs. In the ‘High’ case, the value of EUR 0.35 for the direct crowding-in effect of the Framework Programme on applied research is implemented as for the ex-post evaluation of the Horizon 2020 programme. This value was recently supported by the Phase II results from the OECD Microberd+ project<sup>37</sup>, which found an average marginal additional effect of direct support to private R&D in OECD at +EUR 0.48, with a 90% confidence interval: [+EUR 0.30 - +EUR 0.66]. Retaining the (conservative) lower value of the confidence interval and adding +EUR 0.05 from the literature<sup>38</sup> on the additional crowding-in effect of EC direct R&D supports compared to national R&D supports, ends therefore on this +EUR 0.35 value. For the EAV, we assumed +20% that comes out of the microanalysis done for the ex-post evaluation of FP7.<sup>39</sup> It can indicate that the +15% used in the past may be too conservative. An EAV of +20% compared with national funding was based notably on the following findings:

- For FP7 comparing SJR (Scientific Journal Ranking), it comes out that the publications produced in Framework Programme projects were published in higher impact journals than non-FP publications published by the same authors who participated in EU-funded projects from 2007 to 2015. It represents a higher scientific impact of about +21%.
- According to the analysis of FP7 survey data, the EU FPs' research teams were around 40% more likely to be granted patents or produce patent applications and 25% of funded research units produced at least one IPR output in 2015 compared to 18% for non-funded units.
- For FP7, the patent analysis shows that the patents produced in the FPs were of higher quality and likely commercial value than similar patents made elsewhere. One of the most often used indicators for a patent's value is the number of citations it received from other patents, and the analysis found that FP7 patents were cited significantly more from the control sample (randomly selected non-FP sample) with a higher score of about +70%.

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<sup>34</sup> J. Ravet, B. Boitier, M. Grancagnolo, P. Le Mouël, L. Stirbat, and P. Zagamé, [The Shape of the Things to Come: Ex-ante Assessment of the Economic Impact of Horizon Europe](#). Journal for Research and Technology Policy Evaluation, 2019, Vol. 47, pp. 96-10

<sup>35</sup> European Commission, Boitier, B., Le-Mouël, P., Zagamé, P., Ricci, A., [Support for assessment of socio-economic and environmental impacts \(SEEI\) of European R&I programme – The case of Horizon Europe](#), Publications Office of the European Union, 2018

<sup>36</sup> European Commission (2013), [The Grand Challenge – The design and societal impact of Horizon 2020](#), Directorate-General for Research and Innovation.

<sup>37</sup> OECD. [The impact of R&D tax incentives: Results from the OECD microBeRD+ project](#). OECD science, technology and industry policy papers. October 2023. N° 159.

<sup>38</sup> European Commission, Boitier, B., Le-Mouël, P., Zagamé, P., Ricci, A., [Support for assessment of socio-economic and environmental impacts \(SEEI\) of European R&I programme – The case of Horizon Europe](#), Publications Office of the European Union, 2018

<sup>39</sup> European Commission: Directorate-General for Research and Innovation, [Assessment of the Union added value and the economic impact of the EU Framework Programmes – Final report](#), Publications Office, 2017

- FP7 patents cited non-patent literature +11% more often than non-FP patents, suggesting that FP patents are likely to be of higher technological value and more likely to be based on cutting-edge scientific knowledge.

Finally, **Table 2** reports the assumptions underlying the precise outline of the framework programme budget, its annual layout, and the distribution of the Commission contribution between basic and applied research, Member States and the different economic activities.

Table 2: Horizon Europe budget and its repartition

| HE budget (EC contribution, in constant million € 2020)  | Average duration of HE projects (in years) | Repartition between basic and applied research | Geographical allocation of funds | Sectoral allocation of funds                        |
|--|--|--|----------------------------------|---|
| Reduced by 7.6% in constant terms compared to what was assumed in 2020, due to inflationary crisis | 3  | Basic: 38%<br>Applied: 62%                     | Based on eCorda                  | Based on CORDA data and Orbis for private companies |

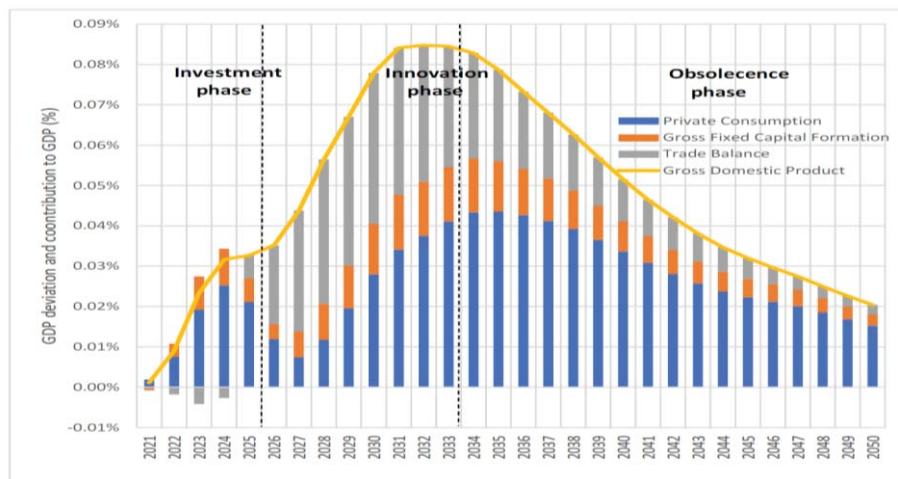
The data used for NEMESIS go up to 10 June 2023, with 9,457 projects signed for EUR 24,732 billion of EC contribution. Out of a total budget of 24.732 billion of EC contribution, only 22,841 billion was retained in the study. This was done by subtracting the part of the EC contribution that benefits countries outside the EU-28. In the model, EC funding is implemented in constant euros. Consequently, the Horizon Europe budget decreases from EUR 22.8 billion to only EUR 17.8 billion when converted from current euros to constant euros of 2020. In addition, the current inflationary crisis has an important impact on the Horizon Europe budget measured in euro constant 2020. Consequently, the budget implemented in NEMESIS was reduced by 7.6% in constant terms compared to what was assumed when the Horizon Europe budget was adopted in December 2020. The average duration of the financed project was estimated to be about three years. The split between basic and applied research was 38% for basic and 62% for applied. This distribution was determined by assuming that the EC contribution benefiting public bodies and higher education institutions finances basic research, with the remaining portion allocated to applied research. The geographical allocation of the funds was based on eCORDA. Finally, the Horizon Europe budget was introduced at a sectoral level in NEMESIS by considering that the basic research is performed by the public sector and the applied one by the private sector, with a sectoral repartition based on CORDA data and Orbis for private companies.

## Results

This section provides an overview of the results of the interim evaluation of Horizon Europe, covering Horizon Europe financing engaged from January 2021 to June 2023 and for Horizon Europe only, i.e. isolated from FP7 and Horizon 2020. The results are displayed for the ‘Medium’ case, where the assumptions retained for the direct crowding-in effect and the EAV of Horizon Europe have medium values. The results indicate that Horizon Europe produces positive effects on GDP. **Figure 1** displays the results from the simulation across three main phases: *Investment*,

*Innovation and Obsolescence.*<sup>40</sup> The GDP gains, although limited during the *investment* phase, are about +0.02 of GDP percentage points (GDP ppt) on average between 2021 and 2025. During these first years, the programme's positive effects on GDP come mainly from its crowding-in on the R&D investments by Framework Programme's beneficiaries. The programme is financed by an equivalent cut in public investments in Member States, but the crowding-in effect induces a net positive impact on investment at the macroeconomic level. Compared to other forms of investments, the high and direct content in the labour of R&D investments also raises households' income and final consumption, where the main GDP gains originate during this first phase. There are, in return, inflationary pressures that deteriorate the external balance during the first four years of simulation. Still, the situation begins to ameliorate in 2024, with the arrival of the first *innovations* that the programme has financed. The GDP gains increase reaching a maximum annual average of about +0.085 ppt in 2031 up to 2033, and an average of about +0.067 ppt in 2026-2033. Finally, after 2033, the reduction in R&D investments induced by Horizon Europe after 2025, along with the gradual *obsolescence* of the new knowledge and innovations it has contributed to create, gradually offsets the GDP gains. The external balance (and investment) remains positively impacted by the programme from 2033 to 2050. Nevertheless, final consumption emerges as the primary contributor to GDP gains, with a growing relative contribution during this obsolescence phase.

Figure 1: The impact of Horizon Europe on EU GDP and its components



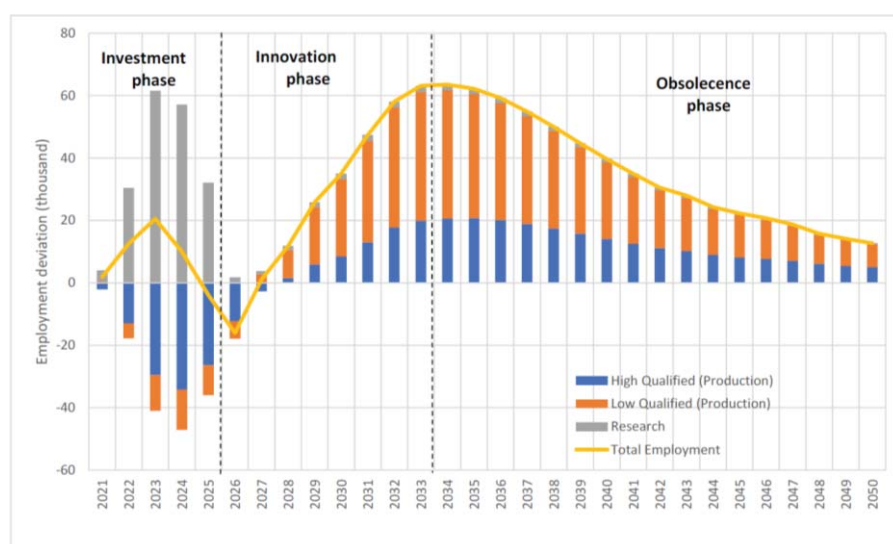
Source: Innovative Europe Annex, NEMESIS simulation, p. 430

Positive effects are observed also on the employment level. As reported in **Figure 2**, the *Investment* phase is characterised by a significant increase in the number of persons employed in the research sector, with the creation of up to 60,000 jobs in research by 2023-2024. There is, in return, a fall in highly qualified employment in production activities. Doctors, engineers, and technicians employed by research entities are scarce in the labour market of highly qualified workers. Thus, the rise in qualified workers wages reduces the overall demand for this category of workers. Similarly, but to a much lower extent, low-qualified employment declines slightly. This crowding-

<sup>40</sup> For simplicity, the three phases follow each other chronologically in the figures, but in reality they overlap.

out effect of research employment on production employment means that total employment increases only very slightly in this first phase. During the *Innovation* period, Horizon Europe funding and investment in research goes down and research employment stabilises by about +1,650 between 2026 and 2033, compared to the reference scenario. Research employment does not crowd out any more research employment, and the market deployment of the provoked innovations leads to large job creation in every economic sector. On average, in 2026-2033, the gain in total employment is about +28,000, with +1,650 for research employment and +6,440 and +20,181 for high and low-qualified jobs, respectively. During the *Obsolescence* phase, similarly to GDP, the employment gains decrease gradually from +64,000 in 2034, at their maximum, to +13,000 in 2050.

Figure 2: The impact of Horizon Europe on employment



Source: Innovative Europe Annex, NEMESIS simulation, p. 431

In addition to ‘medium’ case of Horizon Europe only, effects on GDP and employment were also simulated using NEMESIS model for the case where Horizon Europe – covering financial engagement from January 2021 to June 2023 – is considered altogether with the two past FPs (FP7 and Horizon 2020) and compared with ‘low’ and ‘high’ case.<sup>41</sup>

### Limitations of the model

While NEMESIS’ strengths justify its relevance when measuring the impact of R&I policies, the model’s specific features also imply a number of limitations to be considered when interpreting the results. First, the model relies on the empirical observation of relationships and allows for flexibility in behavioural functions, which may generate inconsistencies between the most recent

<sup>41</sup> European Commission, Naujokaitytė, R., Cakić, M., Didžiulytė, M., Zharkalliu-Roussou, K. et al., [Annexes for the evaluation study of the European framework programmes for research and innovation for innovative Europe – Phase 2 – Supporting the interim evaluation of Horizon Europe](#), Publications Office of the European Union, 2024, p. 429 – 462.

developments in macroeconomic theory. Furthermore, it uses adaptive expectations rather than forward-looking ones. NEMESIS also does not link the use of human capital with investments in the educational system.

## 1.2. RHOMOLO

### *Presentation of the model*

RHOMOLO<sup>42</sup> is the macroeconomic model of the European Commission focusing on EU regions. It has been developed and maintained by the Joint Research Centre, in cooperation with the Directorate-General for Regional and Urban Policy. It is used for policy impact assessment and provides sector-, region- and time-specific simulations on investments and reforms covering a wide array of policies. RHOMOLO is built on a micro-founded general equilibrium approach and is used to provide a breakdown of results by region and sector.

### *Structure of the model*

RHOMOLO is a spatial dynamic computable general equilibrium (CGE) model with new economic geography features.<sup>43</sup> The version of the model used for this evaluation covers 276 NUTS 2 regions of the EU and the UK. Each region contains ten economic sectors operating under monopolistic competition (with the exception of agriculture and public services, which operate under perfect competition). Regional goods are produced by combining labour and capital with domestic and imported intermediate inputs. Public capital enters the production function as an unpaid factor.

Final goods are consumed by households, government and investors. Each region is inhabited by a representative household, which supplies labour of three skill types, consumes and saves part of its income. The government collects taxes, purchases public consumption goods, invests in the economy and transfers resources to the various agents in the economy. Goods and services can either be sold within the domestic economy or exported to other regions. Trade between regions is associated with a set of bilateral regional transport costs.<sup>44</sup> The RHOMOLO model incorporates imperfect competition in the labour market and allows for unemployment. Wage formation is assumed to follow a wage curve specification<sup>45</sup>, which implies that lower unemployment increases workers' bargaining power and thus real wages.

The RHOMOLO model includes two types of capital: sector-specific private capital and public capital. The latter is accumulated by the government through public investment, and it is considered an unpaid factor of production freely available to firms in all sectors within each

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<sup>42</sup> Christou, T., Crucitti, F., García Rodríguez, A., Lazarou, N.J., and Salotti, S. (2023), 'The RHOMOLO ex-post impact assessment of the 2014-2020 European research and innovation funding programme (Horizon 2020)', JRC Working Papers on Territorial Modelling and Analysis, No. 01/2024, European Commission, Seville, JRC133690.

<sup>43</sup> Lecca, P., Barbero, J., Christensen, M.A., Conte, A., Di Comite, F., Diaz-Lanchas, J., Diukanova, O., Mandras, G., Persyn, D., and Sakkas, S. (2018). RHOMOLO V3: A spatial modelling framework. JRC Technical Reports JRC111861, EUR 29229 EN, Publications Office of the European Union, Luxembourg.

<sup>44</sup> Persyn, D., Díaz-Lanchas, J., and Barbero, J. (2022). [Estimating distance and road transport costs between and within European Union regions](#). Transport Policy 124, 33-42.

<sup>45</sup> Blanchflower, D.G., and Oswald, A.J. (1995). [An introduction to the wage curve](#). Journal of Economic Perspectives 9(3), 153-167.



region.<sup>46</sup> Public capital is subject to congestion<sup>47</sup>, so its efficiency declines as production increases, and the elasticity of output to public capital is set to 0.08.<sup>48</sup> Sector-specific private capital is accumulated by private investors. The investment-capital ratio is a function of the rate of return on capital and the user cost of capital, allowing the capital stock to reach its desired level smoothly over time.

## Box 2: How RHOMOLO models innovation

- R&D expenditure is modelled as private investment. Therefore, R&I expenditure generates demand for capital goods. In addition, R&I expenditure leads to the accumulation of an intangible knowledge capital stock, which has a positive effect on total factor productivity (TFP).
- Public spending to support R&I is introduced into the model as a reduction in the user cost of capital, which in turn generates an increase in private investment.
- The impact of R&I spending on TFP through the accumulated stock of knowledge capital is captured by a set of regional elasticities, ranging between 0.01 and 0.04, that are positively related to regional research and development (R&D) intensity.
- The intuition is that firms in regions that already spend a lot on R&D signal their pre-existing capacity to generate value from innovation activities. The range of R&D elasticities is between 0.01 and 0.04, which is in line with the existing literature<sup>49</sup> on this topic.
- Expectations are assumed to be myopic and the model is solved sequentially, with stocks being updated at the start of each period. For this particular exercise, capital mobility within the EU was assumed, but no labour mobility.

## *Key assumptions for the interim evaluation*

The RHOMOLO analysis covered the investments made under Horizon Europe programme between 2021 and 2024. The data related to these investments was based on the CORDA database, in monetary terms by NUTS 2 region and by year, and include only projects signed before 1 July 2024. The key assumptions retained for the simulation of the results are summarised in Table 3.

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<sup>46</sup> Barro, R.J. (1990). [Government spending in a simple model of endogenous growth](#). Journal of Political Economy 98(5), S103-S125; Baxter, M., and King, R.G. (1993). [Fiscal policy in general equilibrium](#). American Economic Review 83(3), 315-334.

<sup>47</sup> Fisher, W.H., and Turnovsky, S.J. (1998). [Public investment, congestion, and private capital accumulation](#). The Economic Journal 108(447), 399-413.

<sup>48</sup> in line with the findings by Bom, P. R., and Ligthart, J. E., (2014). [What have we learned from three decades of research on the productivity of public capital?](#) Journal of Economic Surveys 28(5), 889-916, and the modelling choices made by Pfeiffer, P., Varga, J., and in 't Veld, J., (2021). [Quantifying spillovers of Next Generation EU investment](#). European Economy Discussion Papers no. 144, July.

<sup>49</sup> Männasoo, K., Hein, H., and Ruubel, R. (2018). [The contributions of human capital, R&D spending and convergence to total factor productivity growth](#). Regional Studies 52(12), 1598-1611.

Table 3: Key assumptions for the RHOMOLO model

| Key assumptions                             |  |
|---|--|
| <b>Budget size and allocation</b>           | The total amount of funding examined is €33,890,389,958  |
| <b>Support to basic vs applied research</b> | It is assumed that 30% of the funding are allocated to basic research and 70% to applied research  |
| <b>Regional spillovers</b>                  | Regional spillovers in the model are related mainly to trade flows and interregional capital mobility.   |
| <b>Direct leverage effect</b>               | European applied research funds crowd in additional private investment (+15%)  |
| <b>Economic performance</b>                 | The output elasticity of public capital accumulated thanks to Horizon Europe (EU funding) is 15% higher than the standard elasticity (national funding). The same is true for the Total Factor Productivity elasticity of private investment funded by Horizon Europe. |
| <b>Financing</b>                            | Lump sum   |
| <b>EU Added Value</b>                       | To account for the added value of the EU-level instruments, a 15% increase was applied to the output elasticity of the additional public capital accumulated thanks to the Horizon Europe funds and to the TFP elasticity of private investment.                       |

Firstly, it is assumed that 30% of the funding are allocated to basic research and 70% to applied research. The funds allocated to public bodies and higher education institutions are considered as basic research and the rest as applied research (a similar split had also been used in the ex-post evaluation of Horizon 2020).

In RHOMOLO, basic research funding is simulated via an increase in public investment, which leads to a temporary increase in the public capital stock of the regions (which depreciates at a rate of 5% per year). Due to the role of public capital in the production function, in addition to the demand-side effect of increased (public) investment, this increases the productivity of firms.

It is assumed that the applied research funds reduce the user cost of capital, leading to an increase in private investment. This is a demand-side effect that also leads to a temporary increase in the private capital stock (which depreciates at an annual rate of 15%). Based on the NEMESIS assumption regarding leverage, the change in the user cost of capital is calibrated so that the European applied research funds crowd in additional private investment (+15%). It is also assumed that this R&I investment leads to an increase in TFP, subject to an annual depreciation rate of 5% and with an elasticity that depends on the R&D intensity.

Based on the evidence<sup>50</sup> and to be consistent with the NEMESIS analysis, the output elasticity of the additional public capital accumulated thanks to the Horizon Europe funds was increased by 15%, and the TFP elasticity of private investment was also increased by 15% to account for the added value of EU-level investments that lead to economies of scale and scope and increased cooperation between institutions.

Finally, it is assumed that the policy is financed by lump-sum transfers. In order to mimic the financing of the EU budget, regional contributions are proportional to the GDP weight of each

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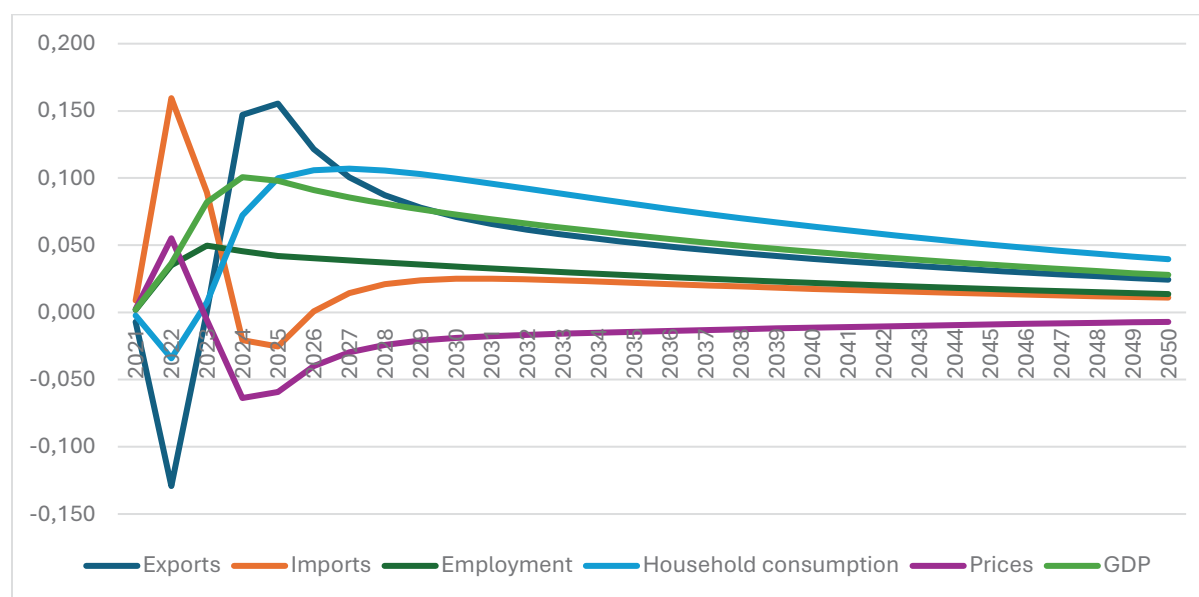
<sup>50</sup> Mitra, A., Canton, E., Ravet, J., and Steeman, J.T. (2024). [The added value of European investments in research and innovation](#). Publications Office of the European Union, 2024

region in the EU GDP. In other words, a region does not necessarily have to finance the policy with a contribution equal to the amount of Horizon Europe earmarked for the region itself, but instead the contribution depends on the share of EU GDP generated in the region.

## Results

The impact on GDP increases steadily over the implementation period, peaking at +0.10% in 2024. It then gradually declines as the simulated monetary injection ends, the increased private and public capital stocks depreciate and the temporary increase in TFP fades. In 2050, the residual effects of the policy are relatively small, as GDP is 0.03% above its initial level. The policy injection also leads to improvements in employment, whose impact peaks at +0.05% in 2023, amounting to about 94,600 persons (the total number of persons employed in the EU in the reference year of the model (2020) is 190 million).

Figure 3: Horizon Europe (2021-2024) impact over time on selected macroeconomic variables (EU27)



Source: JRC - RHOMOLO simulations.

The other variables presented in Figure 3 show that the Horizon Europe injections lead to an initial deterioration in the EU's trade balance with the rest of the world, as imports increase and exports decrease in the early years of the simulation. This is due to the initial increase in demand caused by the policy injection and the subsequent increase in prices (measured here by the changes in the GDP deflator). Competitiveness then improves, leading to a fall in the price level, with a positive impact on exports and hence on the trade balance.

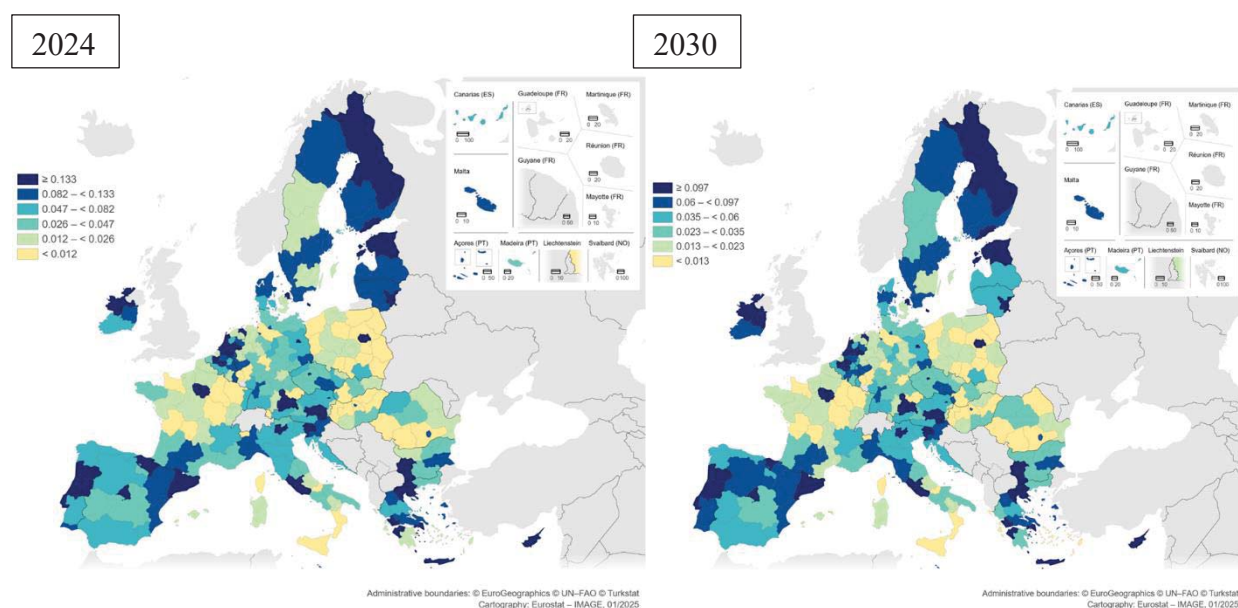
Figure 4 presents the territorial distribution of the GDP impact of Horizon Europe investment, expressed as percentage deviations from the baseline (i.e. a hypothetical scenario without Horizon Europe) in 2024, 2030, 2034 and 2050. The impact on GDP in 2024 is stronger in the regions targeted by the Horizon Europe policy. For example, the macroeconomic impact of the policy is relatively high in the Scandinavian regions, Central Europe and the Iberian Peninsula. Moreover, in most countries the capital regions benefit more than the other regions, which is particularly

evident in countries such as Poland, the Czech Republic, Slovakia, Hungary, Bulgaria, and Romania.

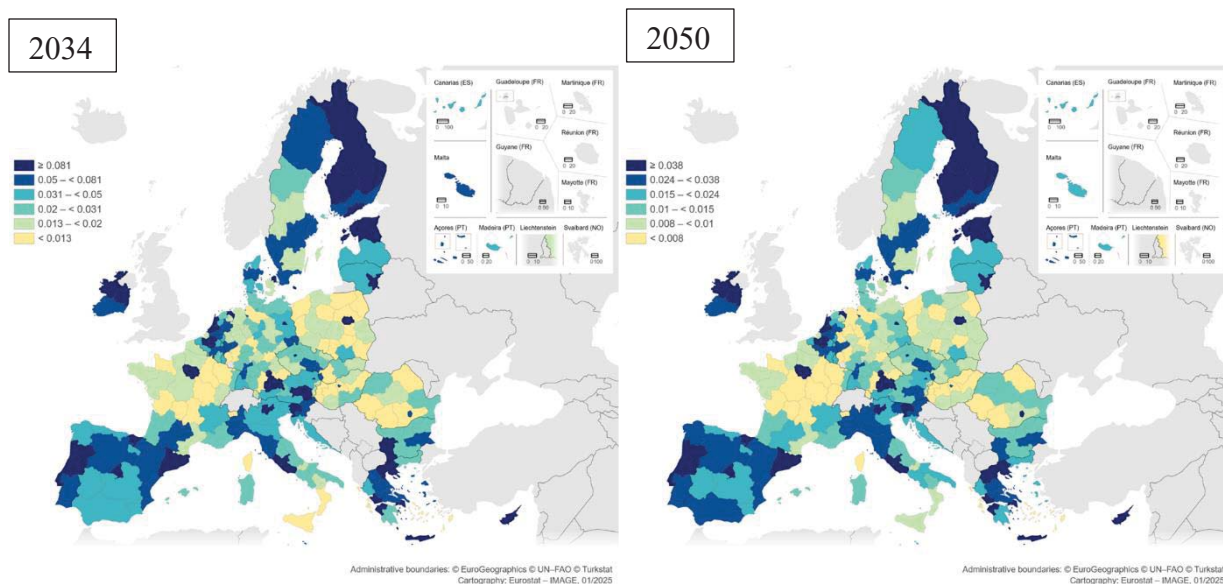
Over time, in countries such as Spain, Italy, France, Germany and Poland, the effects gradually spill over to regions receiving relatively less Horizon Europe funding (2021-2024). However, this does not seem to be the case in all EU countries, as the effects remain mostly concentrated in the richest regions, which are also the capital regions in Hungary, Bulgaria and Romania. This last finding is not entirely surprising: investments in the capital regions show little spillover to the peripheral regions, because the trade flows of the richest regions are mostly with regions abroad and therefore investments there do not stimulate production in the neighbouring regions of the same country.<sup>51</sup>

Overall, the magnitude of the impact decreases across the board, due to the temporary nature of the investments and the assumed depreciation rates of the temporarily increased private and public capital stocks, as well as the decay rate of the TFP improvements.

Figure 4: Territorial distribution of the GDP impact of the Horizon Europe funds (2021-2024) in 2024-2050



<sup>51</sup> Barbero, J., et al. (2024). [A spatial macroeconomic analysis of the equity-efficiency trade-off of the European cohesion policy](#). Spatial Economic Analysis 19(3), 394-410.



Source: JRC - RHOMOLO simulations.

### *Limitations of the model*

The results presented above assume that all funds allocated through Horizon Europe are used efficiently and activate the economic channels used in the model to simulate their impact. Also, the timing assumption is that the funds start affecting the economy as soon as the projects are signed, but it is realistic to expect delays in terms of deployment of the money with respect to the date of project signature. The distinction between basic and applied research can be considered as a strong assumption, in particular due to its homogeneity across EU regions. Finally, the results are inevitably affected by the parameterisation of the shocks used to simulate the impact of the policy (including the elasticity used to govern the changes in TFP brought about by the Horizon Europe investments or the output elasticity of public capital). The uncertainty of results is limited by using values that are consistent with the existing literature on the subject.

## **1.3. FIDELIO**

### *1.1 Presentation of the model*

FIDELIO is a macroeconomic model developed by the Joint research Centre of the European Commission to analyse at industrial level how investment grants stimulate growth in the EU economy. The model simulates the impact of R&I funding by incorporating R&D expenditures as secondary activities within a wide range of industries (64), and disentangles the Gross Expenditures in R&D (GERD), by institutional sectors (BERD, GOVERD, HERD), by NACE industry and country-wise economic effects. With its granularity in terms of economic sectors and its ability to capture sectoral spillover and dependency effects, it provides valuable insights for policy impact assessment.

### *Structure of the model*

FIDELIO is a Multi-sector Dynamic General Equilibrium economic model, designed for policy impact assessment, providing industrial-, country-, and time-specific simulations. The model



compares counterfactual and baseline equilibriums to assess interaction effects between economic agents.

As an Input-Output model, FIDELIO is able to capture all sectoral spillover and dependency effects of any policy under analysis due to its granularity in terms of economic sectors and regions. In fact, FIDELIO describes 64 economic sectors, and is a multi-regional model, describing agents' choices in 41 countries (27 + 1 EU countries and 13 non-EU countries). The model also captures how a policy can change trade balances, relative prices and comparative advantage in the international trade arena.

To produce, firms use four production factors: capital, labour, energy intermediates, and non-energy intermediates or materials. From the production processes, firms pay the cost of the other factors of production (labour and capital) to households and to the government. Goods and services can either be sold within the domestic economy or exported to other regions. Households receive their income through wages, a share of the gross operating surplus, property income and the governmental and non-governmental transfers. Household income, net of taxes and social security contributions, is used to consume or to save.

The Government raises its revenue from five main sources: operating surplus that goes to the government, production taxes, taxes less subsidies on products, social security contributions and taxes on household income. This revenue is then used to finance the government interest, the government capital formation, the government transfers to the households, and the government consumption that is another component of the total demand. The budget balance is calculated as the difference between government revenues and expenses, and it determines the variation in public debt.

#### Box 3: Modelling of R&I activities in FIDELIO

- FIDELIO is an Input-Output model that includes some of the most important properties of endogenous growth theory (innovation and knowledge spillovers) to simulate the potential effect of R&D subsidies on economic growth. In this sense, two types of economic effects are expected.
- The first effect refers to the rippling effect throughout the economy brought about by spending on R&I. This is called the Keynesian multiplier effect and occurs with spending on any type of product. The allocation of inputs to the R&D process are reflected in enlarged levels of future output of economic sectors from one period to another. That is, incremental changes in direct input coefficients, productivity growth and changes of R&D capital-output intensities.
- The second effect is the increase in productivity due to technical progress and only occurs through spending on R&D. This is called the return on R&D. This is part of the dynamics of the model introduced in a second stage, in which the sectoral interlinkages are modelled on the values that are assumed to be exogenous at the beginning of the next period(s). Current decisions regarding R&D expenditures shape future production functions and investment decision, thus, additional value added by country and sector is included in the investment trajectory as a future expenditure in R&D. Consequently, R&D funds, which are considered exogenous to the short-run decision process, can be fed into the system and long-term effects of parameter changes can be studied.

- The modelling approach is sequential since, at the beginning of each period (first stage), the industries have to decide on their current period R&D inputs on the basis of their previous output levels and the prevailing production functions in their R&D sector. The complete set of these short-run equations yields current output, R&D, employment and final demand levels (static input-output model in each period).

Table 4: Key assumptions for the interim evaluation

| FIDELIO                                     | Key assumptions  |
|---|--|
| <b>Budget size and allocation</b>           | The total amount of funding examined is €33,884,503,833  |
| <b>Support to basic vs applied research</b> | It is assumed that 30% of the funding is dedicated to basic research, specifically in the NACE M72 category from the BERD sector, 30% to the HERD sector, 3% to the GOVERD sector, and the remaining 37% is allocated to applied research, covering the remaining BERD sector categories.  |
| <b>Regional spillovers</b>                  | Country spillovers are primarily linked to trade flows at the industry level.  |
| <b>Direct leverage effect</b>               | European applied research funds crowd in additional private investment (+17%)  |
| <b>Economic performance</b>                 | It is assumed that BERD, HERD, and GOVERD sectors display varying degrees of Value-Added elasticities due to the industries' distinct contributions to the economy. The average value at the European level for Business R&D performance, focused on nurturing innovation and productivity within industries, exhibits a 3.5% elasticity to the economy. On the other hand, Public R&D performance demonstrates a higher responsiveness. HERD, emphasizing human capital development and knowledge generation, boasts a 6.1% elasticity, while GOVERD, which funds basic research, exhibits a 3.6% elasticity. |
| <b>Financing</b>                            | Lump sum   |
| <b>EU Added Value</b>                       | EU R&I investment is not modelled as generating an increased sectoral performance compared to national or regional R&I investment.   |

In FIDELIO modelling, both basic and applied research are funded. For basic research in the BERD sector, the sectoral R&D activities are embodied in the coproduction of product “CPA-M72 - Scientific research and development services” on the supply side. The coproduction of product M72 increases according to the allocation of Horizon Europe funding by country and by sector.

In terms of the effect of innovation, all three types of expenditure (BERD, HERD, and GOVERD)<sup>52</sup> contribute to fostering innovation. BERD drives innovation within the private sector,

<sup>52</sup> Gross Expenditures in R&D encompasses the total expenditure on R&D across all sectors of the economy, including higher education, business enterprises, and government. HERD refers specifically to R&D spending by higher education institutions, such as universities and colleges. BERD pertains to R&D expenditures made by private businesses and companies, while GOVERD refers to the R&D investments made by government entities or public sector organizations.

HERD supports the development of innovative ideas and human capital in higher education institutions, and GOVERD ensures the funding of long-term, basic research, and strategic R&D priorities. Together, these expenditures create a synergistic effect that promotes technological advancements, economic growth, and societal well-being.

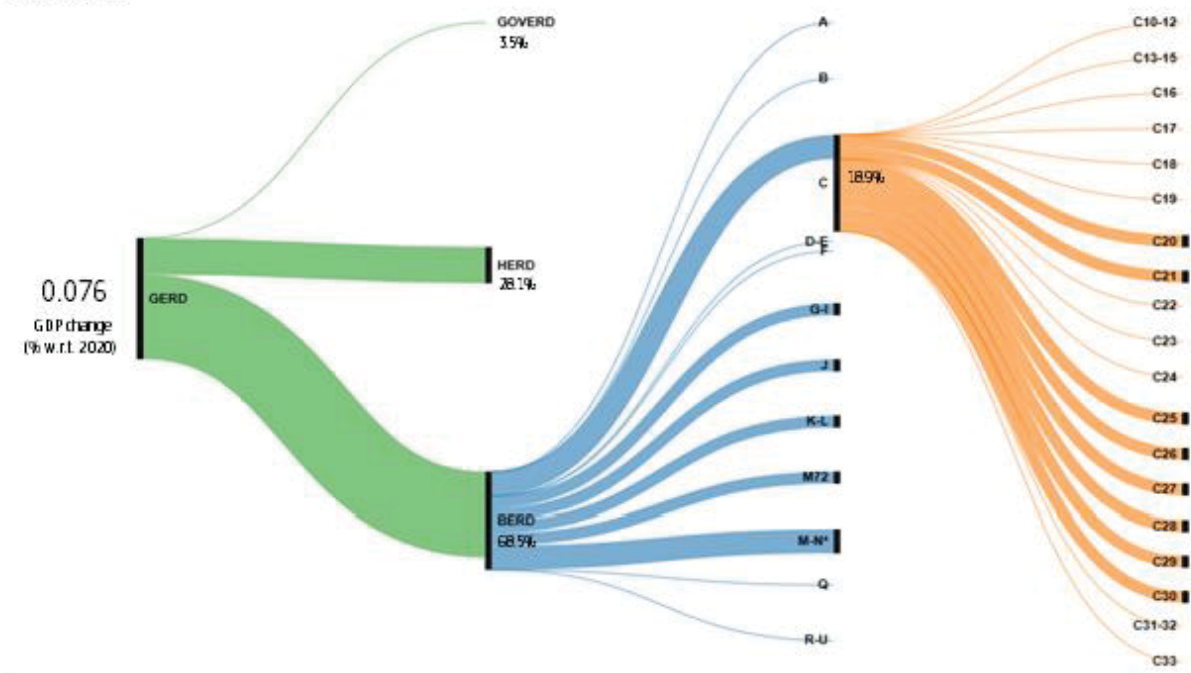
## *Results*

The impact analysis of Horizon Europe using the FIDELIO model demonstrates a positive effect on the European economy, particularly in the manufacturing sector. In particular, simulations results indicate that investments in R&D contribute to consistent GDP growth throughout the policy implementation period, with the GDP being 0.08% higher than the 2020 baseline scenario in 2023. The GDP multiplier increases over time, as the impact on GDP remains positive throughout the simulation period, while the policy shocks are confined to the initial four years. As the policy implementation nears its conclusion, the multiplier gradually approaches 1 and eventually surpasses 1.6 by the end of the programming period in 2027. The supply-side effects of the policy contribute to its continued rise, leading the multiplier to exceed 4.7 in 2050.

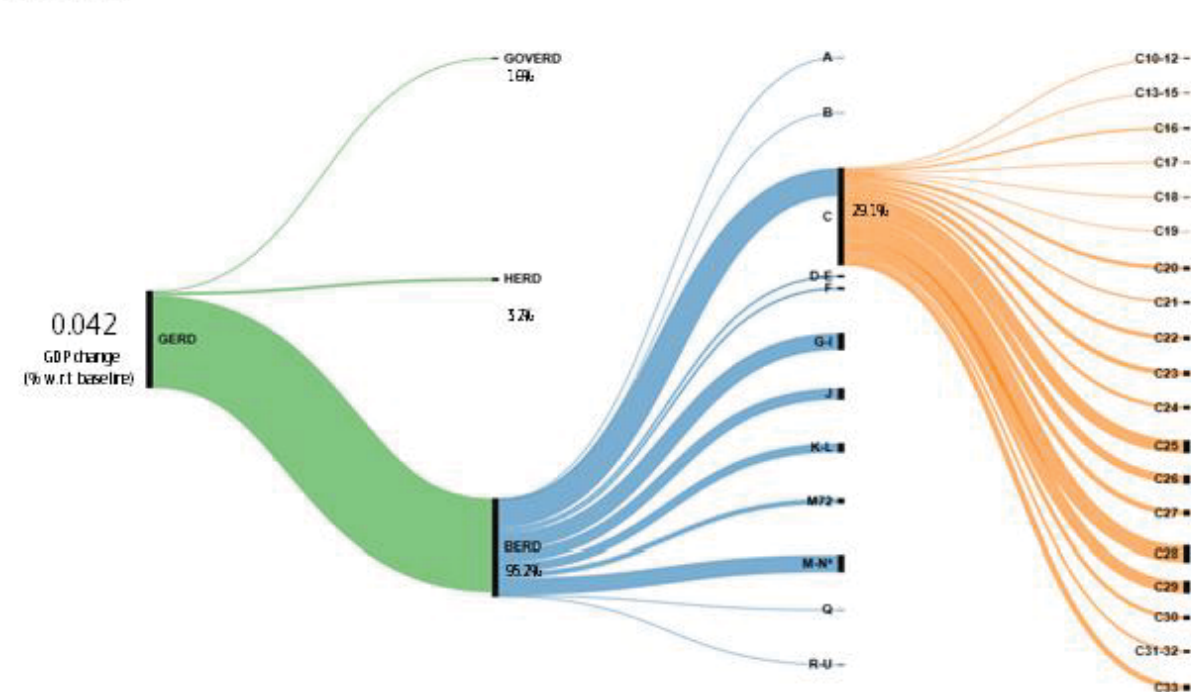
The impact of Horizon Europe funds on the EU can be broken down by institutional sector (HERD, BERD, GERD) and by industry (NACE codes). In 2023, within the EU, 68.5% of the impact is directed towards BERD, followed by 28.1% towards HERD, while the impact on GOVERD is relatively small (3.5%). Following the Sankey diagram in Figure 5, the disaggregation of the impact on BERD by industry can be visualized. The impact on the manufacturing sector (C) stands out, with the top benefiting sectors being machinery and equipment (C28), computer, electronic, and optical products (C26), motor vehicles, trailers, and semi-trailers (C29), and fabricated metal products (C25). The positive effects on innovations gains, in the BERD sector investments contribute to substantial GDP gains following the conclusion of the four-year intervention period.

Figure 5: Horizon Europe impact on EU, by institutional sector and industry.

Year: 2023



Year: 2030



Source: FIDELIO simulations, JRC.

#### Limitations of the model

Similarly to the RHOMOLO model, the results presented above assume that all funds allocated through Horizon Europe are used efficiently and activate the economic channels used in the model

to simulate their impact. Also, the timing assumption is that the funds start affecting the economy as soon as the projects are signed, but it is realistic to expect delays in terms of deployment of the money with respect to the date of project signature. The results are also affected by the assumed sectoral value-added elasticities (for BERD, HERD and GOVERD) which are the key parameters in the simulation of the impact of sectoral R&D performance on the economy. The uncertainty of results is limited by using values that are consistent with the existing literature on the subject.

### **Analysis of monitoring data**

Monitoring flashes<sup>53</sup> on Horizon Europe, presenting internal analysis on specific topics of interest, were also used to feed into the evaluation report.

## **2. Documentary review / desk research**

Extensive desk research was conducted to ensure background information, as well as to provide evidence that was then triangulated with other sources of information to draft the answers to the evaluation questions. Documents reviewed included legal texts, strategic documents, previous evaluations and policy analyses.

## **3. Analysis of unstructured data**

The following types of unstructured analyses were carried out: text mining to detect patterns and trends relating to sustainability practices in MSCA research<sup>54</sup>, to analyse how different parts of Horizon Europe contributed to SDGs and to new or fast-growing research and innovation topics.<sup>55</sup>

### *Limitations of SDG analysis*

Direct comparison of EU contributions to SDGs in Horizon Europe and Horizon 2020 was not possible for the following reasons: 1) Horizon 2020 analysis was based on closed projects, 2) the early stage of the Horizon Europe programme, 3) Horizon 2020 analysis was based on publications data, and in Horizon Europe on the proposal text (description of action).

## **4. Interviews**

The primary purpose of the interviews was to collect evidence from the different actors concerned by the framework programme. This would give an objective assessment of what has happened by taking into account the different points of view. This method was used in particular in case studies and international benchmarks. Interviews were also conducted to confirm and complement the data collection, with a view to drafting the findings and conclusions. Some 1 049 interviews were conducted (including some with the same actors on different topics), gathering the perspectives of Commission staff, Member States, associated countries, and a large range of stakeholders (universities, companies, umbrella organisations, etc.).

## **5. Targeted survey**

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<sup>53</sup> [SME participation in Horizon Europe](#) (2024), [Country participation in the EU R&I FPs](#) (2024), [Fostering gender equality](#) (2025), [EU Missions](#) (2025).

<sup>54</sup> Excellent Science evaluation study, 2024, [Annex 2.3](#), p. 309, 333

<sup>55</sup> Innovative Europe evaluation study, 2024, [Annex 6](#), pp. 397-417, Resilient Europe study, [Annex 3](#), p. 205-208.



A targeted evaluation survey<sup>56</sup> was designed by independent contractors to collect data for the interim evaluation of the programme. The survey was conducted between May and July 2023 and covered beneficiaries and unsuccessful applicants in Horizon Europe. The surveys gathered evidence on the needs and motivation for engaging with Horizon Europe, perceptions of expected project outcomes and impacts, and obstacles encountered during the application and project implementation.

The survey of Horizon Europe's **beneficiaries** included six different questionnaires:

1. MSCA Postdoctoral Fellowships beneficiary researchers;
2. ERC beneficiary Principal Investigators (PIs);
3. Beneficiary organisations under collaborative actions, including:
  - a. Pillar I: MSCA (Doctoral Networks; Staff Exchanges; and COFUND), Research Infrastructures.
  - b. Pillar II: Global Challenges & European Industrial Competitiveness (Clusters 1-6).
  - c. Pillar III: beneficiaries of European Innovation ecosystems;
  - d. Horizontal actions: WIDERA.
4. European Innovation Council (EIC): Pathfinder and Transition grants;
5. EIC Accelerator grants.

The survey of Horizon Europe's **unsuccessful applicants** included three questionnaires:

1. MSCA Postdoctoral fellowships and ERC;
2. Horizon Europe's collaborative actions, including:
  - a. Pillar I: MSCA (Doctoral Networks; Staff Exchanges; and COFUND), Research Infrastructures.
  - b. Pillar II: Global Challenges & European Industrial Competitiveness (Clusters 1-6) grants.
  - c. Pillar III: European Innovation Ecosystems grants and EIC Pathfinder and Transition grants.
  - d. Horizontal actions: WIDERA.
3. EIC Accelerator grants.

The survey invitations were sent to all the Horizon Europe beneficiaries and unsuccessful applicants under the relevant programme parts. This strategy allowed collecting survey answers from the maximum number of respondents. Before sending the survey invitations, several steps were taken to clean and prepare the eCORDA contact data. This involved removing ineligible or irrelevant applications, filtering out irrelevant calls, program parts, and contact types, and

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<sup>56</sup> Catalano G., Consiglio, G., Delponte L., Monaco, F. and Santoro, C. *Survey Visualisation Report – Feedback of Horizon Europe Beneficiaries and Unsuccessful Applicants: Supporting the interim Evaluation of Horizon Europe*. Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/2180607>

eliminating duplicate contacts to ensure each individual received only one survey invite per project. Contacts who had previously requested not to be contacted were also removed, along with invalid email addresses. After these steps, the final contact list included 111,095 unique individuals, comprising 28,843 successful applicants and 82,252 unsuccessful applicants.

**Figure 6** presents the survey response rates by program component. Both the total number of completed responses and the percentages indicating representativeness within each group are illustrated. The total number of respondents among programme beneficiaries is 5 414, while the number of unsuccessful applicants who responded to the survey is 10 290.

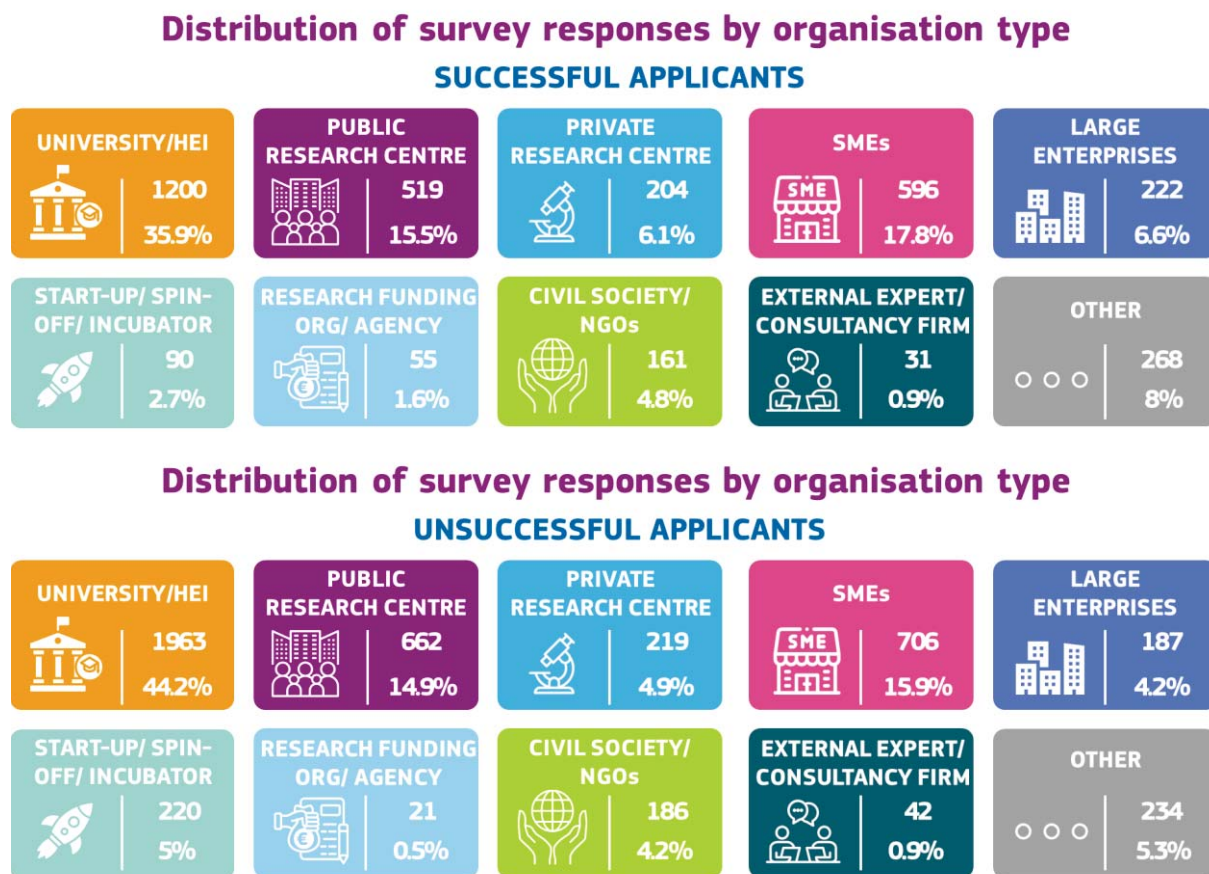
Figure 6: Survey response rate across Horizon Europe programme parts



Source: Survey Visualisation Report - Feedback of Horizon Europe Beneficiaries and Unsuccessful Applicants.

To ensure that there were no underrepresented groups among the different programme parts covered in the survey, the distribution of survey responses by type of organisation was also assessed. The analysis showed that there were no underrepresented groups, and the response pool reflected the structure of Horizon Europe's applicant population (**Figure 7**).

Figure 7: Survey response rate by categories of stakeholders



Source: Survey Visualisation Report: Feedback of Horizon Europe Beneficiaries and Unsuccessful Applicants.

## 6. Network analysis

Network analysis was performed in Digital Europe, Excellent Science, Innovative Europe and Resilient Europe evaluation support studies and involved analysis of connectedness of Horizon Europe programme parts, networks and cross-collaborations within WIDERA. It also included analysis of geographic dimension, and continuity of researchers across the FP.

## 7. Patent analysis

This analysis<sup>57</sup> served to investigate if the FP is attracting patenting companies. The analysis involved extracting metadata from eCorda (June 2023) on Horizon Europe beneficiaries and applicants and identifying matches between them and PATSTAT<sup>58</sup> applicants. Out of 4,759 unique Horizon Europe private-for-profit beneficiaries, 1,556 (33%) were identified in PATSTAT. For non-funded applicants, the shares of identified companies in PATSTAT were similar, with the Horizon Europe share at 30%.

<sup>57</sup> Innovative Europe evaluation study, 2024, [Annex 6](#), pp. 417-419

<sup>58</sup> <https://www.epo.org/en/searching-for-patents/business/patstat>

The analysis of both Horizon Europe beneficiary companies and non-funded applicants matched to PATSTAT looked at the following key metrics:

- number of companies matched to PATSTAT by the Horizon Europe pillar;
- patent value metrics based on: (a) number of patents; (b) number of triadic patents, i.e. patents registered with the European, US and Japanese patent offices; (c) number of high-value patents, i.e. patents that can yield substantial economic gains and may be used to protect one's own products or to create licensing income; and (d) average number of patents per company.

## 8. Bibliometric analysis

The KIP monitoring framework recommends that scientific outputs such as journal publications or citations towards these publications be evaluated at least two years after the supported projects have been completed. On this basis, as of fall 2023, it was not appropriate, nor is even the necessary data available, to conduct a (even partial or initial) bibliometrics evaluation exercise of Horizon Europe journal-publication-mediated scientific outputs. Instead, a so-called calibre analysis was performed in two evaluation studies<sup>59</sup>, which measured enabling factors of Horizon Europe effectiveness, on the prior scientific achievements of researchers involved in projects selected for Horizon Europe funding. In both evaluation studies, Cluster 4, Cluster 5 and Cluster 6 researchers' prior publications (from 2017 to 2021) were retrieved from Scopus to establish their track records on dimensions such as academic-private co-publication, cross-disciplinarity, or scientific excellence (proxied through citation impact), among others. It was hypothesized that Horizon Europe funding competitions should select, for example, researchers with past experience in conducting cross-disciplinary research, as a mechanism to increase the likelihood that societal impacts will be realized from supported projects. In the **Green transition** evaluation study, three altmetric indicators were used:

- citation from online policy-related documents
- Wikipedia mentions
- trade and journalistic news outlets mentions

The indicators used in the **Digital and Industrial transition** evaluation study were:

- Share of international co-publications
- Share of open access publications
- Share of highly cited publications at the 10% level
- Citation distribution index and citation distribution chart
- Interdisciplinary integration
- Multidisciplinary integration
- Publication-level average of authorships held by women
- Share of publications that are academic-private co-publications
- Percentage shares of publications associated with policy-related outcomes
- Percentage shares of publications associated with journalistic mentions or Facebook and Twitter attention.

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<sup>59</sup> Green Transition evaluation study, 2024, [Appendix E](#), p. 201-207; Digital and Industrial Transition evaluation study, 2024, [Annex VI](#), p. 579-622



## 9. Benchmarks

Benchmarking activities provided evidence to inform evaluation questions and identified lessons learnt from best practices worldwide supporting research and innovation. In addition, they put in perspective the framework programme's performance in the area covered by the study. As a minimum, the benchmarks were based on desk research, project monitoring and publication data, and interviews with stakeholders and beneficiaries. The following benchmark was used in the staff working document:

Table 5: Benchmarks

| International benchmark   | Comparison with:   |
|---|--|
| Evidence from the benchmark study <sup>60</sup> demonstrated that Horizon Europe showed similar approaches towards the COVID-19 response to the NIH. The responses are particularly similar in ensuring open data access and data sharing in the field of infectious diseases, infectious disease surveillance on different levels, the development of vaccines and therapeutics to prevent and treat COVID-19, as well as emerging infectious diseases and dedicating further research efforts to understand the emerging coronavirus variants. To this end, Horizon Europe also demonstrates flexibility in coping with changing circumstances in the world, such as COVID-19, as the FP continues its funding efforts and directs initiatives towards COVID-19 and coronavirus research, including the preparations for the emerging variants. | US medical research agency National institutes of Health (NIH) |

## 10. Case studies

Overall, 76 case studies were conducted, covering the specific policy objectives, cross-cutting issues, and specific aspects of Horizon Europe such as institutionalised, co-programmed and co-funded partnerships. The impact area evaluation studies had 15 case studies each (except for Innovative Europe evaluation study that had 16).

## 11. Policy workshops

Some 6 policy workshops were conducted to support this evaluation. The workshops were implemented in the context of the independent external studies. They were used to consolidate and increase the robustness of the findings and conclusions arising from the data collection conducted through other methods, addressing evidence gaps whenever needed.

## 12. Public consultation

The public consultation on the interim evaluation of Horizon Europe was part of a larger joint consultation exercise looking at the past present and future of the R&I framework programmes (ex post evaluation Horizon 2020, interim evaluation Horizon Europe and the 2025-2027 strategic plan). In full compliance with the Better Regulation requirements, the online questionnaire was published, among other places, on the Have your Say portal<sup>61</sup>, also offering the possibility to submit position papers. It ran from 1 December 2022 until 23 February 2023.

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<sup>60</sup> Resilient Europe evaluation study, [Annex 5](#), p.21

<sup>61</sup> [Horizon Europe – interim evaluation \(europa.eu\)](https://www.europa.eu/your-say)

For the section on Horizon Europe, 1 663 responses were submitted along with 136 position papers. The factual summary report and position papers have been published on Have your Say portal. To analyse the responses received through the public consultation, *quantitative analysis* was conducted by means of descriptive statistics, differentiating and comparing responses of different groups of respondents. Correct representation and interpretation of results are fundamental to drawing coherent conclusions which is why the number of respondents has been shown along with percentages. Linkages between answers and respondents' characteristics such as participation in the programme, country affiliation and type of respondent (e.g. Member State and business organisation representatives, researchers). When evident, correlations between answers given in closed questions have been explored. The summary statistics were bundled in .xml format which allowed for swift cross-comparison among the various dimensions covered in the public consultation survey.

Key messages were extracted from *qualitative* contributions, primarily position papers and open questions present in the public consultation survey. Same holds true for the analysis of the feedback contributions received for the call for evidence. Contributions were clustered by topics and specific aspects raised in both position papers and open questions by means of using Excel, presenting findings in a contribution matrix.

Although there was some coordination between some of the respondents (e.g., those participating in the same network, cluster, or country), as testified by the uploading of the same position paper by multiple respondents, the analysis of the consultation results does not indicate any campaign affecting the overall results.<sup>62</sup>

### **13. Multivariate regression analysis**

A multivariate regression analysis was run to identify the factors that influence the efficiency of project application and administration processes for Horizon Europe Pillar II's applicants and beneficiaries. It was based on a combination of data from eCORDA (extracted in June 2023, 151 199 applicants under Pillar II) and from the targeted survey.

The dependent variables were based on the survey data and expressed as follows. For the efficiency of application costs: a proposal effort composite, the number of person-days dedicated to proposal preparation, and the perceived proportionality of the proposal effort. For the efficiency of administration process: the perceived proportionality of the granting procedure effort, the perceived proportionality of the project reporting requirements, and the share of project resources dedicated to administrative tasks. The dependent variables were tested independently against a range of independent variables (size of consortium, budget, previous FP experience, role in the consortium, type of organisation, use of NCP, reliance on external support, separation of management tasks from research activities), combined with control variables (cluster, country).

The analysis used OLS regression and logit regression models depending on the nature of the dependent variable. In addition, a bootstrap method was applied to validate the results of the multiple regression models by assessing the stability and reliability of the estimated coefficients (5000 bootstrap replications).

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<sup>62</sup> Overall, 24 campaigns were identified (coordinated responses to the survey by more than one respondent and up to 9). The campaigns include responses by 88 respondents, representing 5% of all responses.

## 14. Overall limitations of the Horizon Europe interim evaluation

Methodological and data limitations were identified (listed below). Thanks to thorough checks ensuring that data is robust, these limitations did not affect the overall reliability of the analysis and the findings. Nevertheless, the evaluation faced the following challenges and limitations:

- Limitations in the analysis are due to the **sizable share of projects that were still ongoing at the time of preparing this evaluation**: only 983 (6.5%) of the 15 148 signed projects have been closed as of 6 January 2025 (projects suspended and terminated are not included). This affects the mid- and long-term impact indicators, as the large majority of projects will not have reached their impact at this early stage.
- Moreover, a considerable share of monitoring and impact indicators – among which the Key Impact Pathways, are based on data collected through periodic reporting by Horizon Europe beneficiaries. As such, the indicators incur a lag in calculation. On 6 January 2025 – the cutoff date for most monitoring data presented in this evaluation, only 3 443 projects had submitted periodic reports. This amounts to 21% of the signed grants by that date.
- A more general limitation regarding monitoring and impact indicators stems from the use of self-reported information by project beneficiaries. This induces sources of possible error and bias, which the Commission mitigates through triangulation and validation of data explicitly included in calculation methods for all indicators, and in particular the Key Impact Pathways. However, in some cases, it can be assumed that some indicators are largely underestimated due to underreported data – such as IPR applications, scientific publications, etc. Moreover, confidentiality of some IPR applications can further reduce their visibility in the Commission’s monitoring systems, thus further underreporting results and impact of the programme.
- Only partial data available to the evaluation on the financial support to **third parties (“cascading grants”)** in Horizon Europe. These grants are not managed through standard Commission IT tools: basic information about participants is submitted in periodic reports by the “first-level” beneficiaries arranging the calls, but only with a significant delay. For European partnerships using a cascading model, such as EIT KICs and co-funded partnerships, integration in Commission monitoring systems takes place with a considerable time delay and did not happen at all until 2024. This is a serious data limitation, as the Commission does not know who is the end-receiver of parts of FP budget is (up to EUR 300 million in Horizon Europe Cluster 4 only). This considerably limited and possibly distorted some of the analysis, especially on the distribution of the funding over participants (type incl. SMEs, geography, newcomers, etc.).<sup>63</sup>
- **Lump sum** projects do not submit financial costs in reporting periods, including personnel costs as FTE. This means that data for some Key Impact Pathway (KIP) indicators that rely on cost declarations will never be available for these projects if no changes are made to the methodology (for the KIP 8 short-term indicator on Number of FTE jobs created, as well as

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<sup>63</sup> Table 9 on “Monitoring and evaluation system - issues encountered” in the evaluation study on [Digital and Industrial Transition](#), 2024.

the KIP 8 medium-term indicator on FTE jobs following the project funded).<sup>64</sup> For KIP 9 short-term indicator (“Amount of public and private investment mobilised with the initial investment for the programme”), which is the difference between total costs and EU contribution - the value available in CORDA is an ex-ante estimation based on co-funding rates defined at the level of each call. The actual value of beneficiary costs will never be reported. This is important for assessing whether the project leverages more funding than it is contractually required to, e.g. for joint undertakings (some of their grants use lump sums).

- Lagged availability, gaps and inconsistencies in the data on indirectly managed actions, which includes some European Partnerships. Different partnership analyses (i.e. in the partnerships’ annual reports, the Biennial Monitoring Report and Corda) have different sources, thus causing inconsistencies even if the formula they use is aligned.
- Policy officers who prepare the text of the calls for proposals are requested to flag the calls if they believe they are relevant for certain predefined priorities, e.g. AI. These flags do not take into account what happens in the project during implementation. For this reason, they cannot be used reliably for analysis, as they only signal *potential* synergies, not actual synergies.
- For Cluster 4, Destination 5 Space, the analysis was limited to the topics implemented by HaDEA. It did not include the topics and actions delegated to the European Space Agency (ESA) and to the EU Space Programme Agency (EUSPA), which represent about half the budget.
- While the evaluation strives to use public data sources, some data on the EIT KICs and EU Missions was not published in a timely way to support the evaluation so internal Commission monitoring is cited as the data source.

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<sup>64</sup> For the short-term KIP indicator, only an ex-ante estimate of the number of employees in lump sum grants is available, from “Part A” of the grant agreement. Analysis is still in progress on the medium-term indicator.

## Annex 3 Evaluation matrix

### 1. Effectiveness

| Evaluation questions                               | Judgement criteria: extent to which...  | Indicators and where available – targets   | Main data sources  |
|--|---|--|--|
| 1.1. To what extent was Horizon Europe successful? | Horizon Europe has advanced scientific excellence ( <i>scientific impacts</i> )                               | <b>KIP 1:</b> Creating high-quality new knowledge<br>Number of publications in peer-reviewed journals<br>Number of awards and prizes won<br>% of peer reviewed scientific publications reported under the <b>KIP 1</b> that come from the European Research Council (ERC) grantees | CORDA dashboard frozen on 1 December 2024<br><a href="#">Replies to stakeholders' consultation</a><br>Programme Performance Statement, June 2024<br>Survey of Horizon Europe ERC beneficiaries   |
|  |   | <b>KIP 2:</b> Strengthening human capital in R&I<br>Number of researchers benefitting from upskilling activities<br>Number of researchers benefitting from mobility activities   | Excellent Science evaluation study (links in Annex 2)<br>CORDA dashboard frozen on 1 December 2024   |
|  |   | <b>KIP 3:</b> Fostering diffusion of knowledge and Open Science<br>Number of open Access publications produced<br>Number of open Access datasets produced<br>Number of open Access software applications produced  | Excellent Science evaluation study (links in Annex 2)<br><a href="#">Replies to stakeholders' consultation</a><br>Resilient Europe evaluation study (links in Annex 2)   |
|  |   | Field-weighted citation impact (FWCI) of Joint Research Centre's (JRC) publications indexed by Scopus<br>Proportion of JRC's publications indexed by Scopus in the top 1% and the top 10% of the most-cited journals ranked according to the SCImago Journal Rank                  | A bibliometric study of JRC's publications indexed by Scopus between 2018 and 2022<br>JRC assessment by a panel of independent experts (links in Annex 2)  |
|  | Horizon Europe has increased the R&I contribution to addressing global challenges ( <i>societal impacts</i> ) | <b>KIP 4:</b> Addressing EU policy priorities and global challenges through R&I.<br>% of Horizon Europe projects focused on SDGs<br>Amount of own funds mobilised by beneficiaries to address SDGs<br>Number of publications linked to SDGs  | Innovative Europe evaluation study, Annex 6.3 (links in Annex 2)<br>Horizon Europe Work Programme<br>Resilient Europe evaluation study (link in Annex 2)<br><a href="#">Biennial Monitoring Report (BMR) 2024</a> on Partnerships in Horizon Europe<br><a href="#">Replies to stakeholders' consultation</a> |
|  |   | <b>KIP 5:</b> Delivering benefits and impact via R&I missions.<br>Missions' progress towards their goal  | Commission Expert Group supporting the monitoring of EU Missions (link in Annex 2)   |



| Evaluation questions | Judgement criteria: extent to which... | Indicators and where available – targets  | Main data sources   |
|----------------------|--|---|---|
|                      |  | % of public consultation respondents who responded that “EU Missions contributed “somewhat” or “to a great extent” to strengthening the impact of European research and innovation<br>% of public consultation respondents who are (very) satisfied with the EU missions’ progress towards objectives so far  | External assessment reports of the EU Missions (links in Annex 2)<br><a href="#">Replies to stakeholders’ consultation</a>  |
|                      |  | <b>KIP 6:</b> Strengthening the uptake of R&I in society<br>% of projects with EU citizens or end-users contribution  | Commission Expert Group supporting the monitoring of EU Missions (link in Annex 2)<br>External assessment reports of the EU Missions (links in Annex 2)   |
|                      |  | Partnership-specific evaluation criteria<br><i>International positioning and visibility:</i> number of partnerships with allocated budgets for collaborations with partners outside the EU<br><i>Transparency and openness:</i> number of new organisations involved in the partnerships, number of countries partnerships were extended to beyond European borders, Participating members from widening countries, number of partnerships with SMEs members<br><i>Phasing-out preparedness:</i> number of partnerships with a phasing-out plan, number of partnerships with measures to improve their financial sustainability and reduce reliance on public funding<br>% of public consultation respondents who either “agreed” or “strongly agreed” that the rationalisation of European Partnerships led to delivering more solutions for the benefits of society, the environment, and the economy | <a href="#">Biennial Monitoring Report (BMR) 2024</a> on Partnerships in Horizon Europe, survey results<br>Partnerships’ individual evaluation reports (links in Annex 2)<br>Digital & Industrial Transition evaluation study, Annex I (link in Annex 2)<br>Resilient Europe evaluation study- Annexes-case study 15<br><a href="#">Replies to stakeholders’ consultation</a> |
|                      |  | Social Sciences and Humanities (SSH):<br>% of Horizon Europe projects that took into account SSH<br>Number of dedicated calls for proposals for SSH related topics<br>Extent to which SSH were incorporated into HE Clusters<br>% of public consultation respondents who reported that SSH should be further elaborated for the Strategic Plan 2025-2027  | Horizon Europe monitoring data<br>Directorate-General for Research and Innovation. (2023). <a href="#">Synopsis report: Looking into the R&amp;I future priorities 2025-2027</a> , p.37<br>Digital & Industrial Transition evaluation study (link in Annex 2)<br>Green transition evaluation study (link in Annex 2)  |

| Evaluation questions | Judgement criteria: extent to which...   | Indicators and where available – targets   | Main data sources   |
|----------------------|--|--|---|
|                      |  | Promotion of Gender Equality<br>Amount of Horizon Europe funding directly linked with gender equality-advancing efforts<br>% of women expert evaluators<br>% of women in Horizon 2020/Europe advisory groups and expert groups<br>% of women project coordinators in FP projects<br>% of women researchers in FP projects<br>% of public consultation respondents who agreed or strongly agreed that strengthened gender equality provisions bear potential to promote gender equality across R&I organisations and activities | Horizon Europe Performance Statement, retrieved 07/10/24 from <a href="https://european-commission.europa.eu">Horizon Europe - Performance - European Commission (europa.eu)</a><br>Fostering gender equality: Key Figures from Horizon Europe (link in Annex 2). <a href="#">Replies to stakeholders' consultation</a><br>Digital & Industrial Transition evaluation study (link in Annex 2) |
|                      |  | International cooperation<br>Associated countries vs Other third countries: <ul style="list-style-type: none"> <li>% of participations in collaborative projects</li> <li>% of EU contribution to non-EU participants</li> <li>% of collaborations that countries are part of</li> </ul> % of public consultation respondents who agreed that participating in Horizon Europe “improved cooperation with partners from other countries - within the EU and beyond”   | Country Participation in R&I Framework programmes (link in Annex 2)<br>Excellent Science evaluation study, annex on international cooperation (link in Annex 2)<br>CORDA dashboard frozen on 1 July 2024<br><a href="#">Replies to stakeholders' consultation</a>   |
|                      | Horizon Europe has fostered innovation-based growth, created jobs and leveraged investments in R&I ( <i>economic impacts</i> ) | <b>KIP 7:</b> Generating innovation-based growth<br>Number of IPR outputs, including patent applications, trademarks, and utility designs<br>Number of innovative products, processes, or methods produced and reported by the projects  | 5 evaluation studies (links in Annex 2)<br>ERC Proof of Concept List of PIs funded CORDA dashboard frozen on 1 December 2024  |
|                      |  | <b>KIP 8:</b> Creating more and better jobs<br>Number of jobs in Full Time Equivalent (FTE) created or maintained with the support of Horizon Europe<br>Total employment creation resulting from Horizon Europe  | Macro modelling analysis. Models: RHOMOLO, FIDELIO (by Joint Research Centre), NEMESIS (in the Innovative Europe study 2024, p. 60)   |

| Evaluation questions | Judgement criteria: extent to which...   | Indicators and where available – targets   | Main data sources   |
|----------------------|--|--|---|
|                      |  | <b>KIP 9:</b> Leveraging investments in R&I<br>% of Horizon Europe contribution to GDP in the EU-27: average annual GDP gain   | Macro modelling analysis. Models: RHOMOLO, FIDELIO (by Joint Research Centre), NEMESIS (in the Innovative Europe study 2024, p. 60)   |
|                      |  | European Innovation Council (EIC)<br>Number of start-ups and SMEs supported by the EIC Accelerator   | Innovative Europe evaluation study (link in Annex 2)<br>CORDA dashboard frozen on 1 December 2024<br>EISMEA, <a href="#">Scaling Deep Tech in Europe – the European Innovation Council Impact Report 2025</a> |
|                      |  | European Innovation Ecosystems (EIE)<br>Number of beneficiaries<br>% of women researchers involved in EIE funded projects<br>Number of identified Regional Innovation Valleys (RIVs)   | CORDA data extracted on 26 September 2024<br>Innovative Europe study (link in Annex 2)  |
|                      |  | European Institute of Innovation and Technology (EIT)<br>Number of people who graduated from the EIT-labelled master and doctoral programmes<br>Number of start-ups were created by students from EIT programmes<br>Number of start-ups as a result of EIT innovation projects<br>Number of start-ups that received support from EIT KICs<br>Number of innovative products or services were put on the market by the EIT KICs<br>Participants in (non-degree) education and training | Innovative Europe evaluation study (link in Annex 2)<br>EIT internal monitoring   |
|                      | Horizon Europe has widened participation and strengthened the European Research Area | Widening MS: <ul style="list-style-type: none"> <li>• % of participation in collaborative projects</li> <li>• % of EU contribution</li> <li>• Applications success rate</li> <li>• % of public consultation respondents who agreed or strongly agreed that Horizon Europe is on track to strengthen and increase the impact and attractiveness of the European Research Area</li> </ul>  | Country Participation in R&I Framework programmes (link in Annex 2)<br>CORDA dashboard frozen on 1 December 2024<br><a href="#">Replies to stakeholders' consultation</a>                                     |

| Evaluation questions | Judgement criteria: extent to which...  | Indicators and where available – targets   | Main data sources   |
|----------------------|---|--|---|
|                      | Exploitation and dissemination measures have made it possible to reach these outcomes and impacts | <p>Number of visitors on Horizon Results Platform</p> <p>Number of beneficiaries and organisations that profited from the Horizon Results Booster</p> <p>% of beneficiaries who agreed to a very large or large extent that EC platforms and measures have positive impacts on facilitating the uptake of projects' research findings</p> <p>% of public consultation respondents who deemed Commission-related exploitation services helpful in view of dissemination, exploitation and access to research and innovation results</p> | <p>Digital and Industrial Transition evaluation study, section 6.2.4</p> <p>Green Transition evaluation study, section 14.4.2</p> <p>The beneficiaries' survey results (targeted evaluation survey, May-July 2023)</p> <p><a href="#">Replies to stakeholders' consultation</a></p> |

## 2. Efficiency

| Questions   | Judgement criteria: extent to which...   | Indicators   | Main data sources   |
|---|--|--|---|
| 2.1 To what extent do the costs of applicants and administrative costs of beneficiaries (including reporting cost) introduce inefficiencies into the framework programme? | <b>Costs of applicants</b> are proportionate to the chances of securing funding and size of grants               | <p>Magnitude of applicant's cost [person-days, EUR]</p> <p>% of Horizon Europe applicants who received (internal and external) support to prepare their proposals</p> <p>Median value of the consultancy fee, EUR</p> <p>Perception of proportionality of unsuccessful and successful applicants</p> <p>% of respondents who 'rather agreed' or 'strongly agreed' that proposal preparation and submission in Horizon Europe is simpler than those in Horizon 2020 (OPC)</p> | <p>Targeted survey responses of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023</p> <p><a href="#">Replies to public stakeholders' consultation</a></p> <p>Responses to open questions to targeted survey of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023</p> <p>Responses to open questions to 2 targeted surveys of Horizon Europe lump sum grants beneficiaries and unsuccessful applicants, autumn 2023 and summer 2024.</p> |
|   | <b>Administrative costs</b> incurred by <b>beneficiaries</b> to fulfil grant agreement obligations are efficient | <p>Magnitude of administrative expenditure of beneficiaries [person-days, EUR]</p> <p>Qualitative feedback on inefficiencies by beneficiaries</p>  |   |

| Questions  | Judgement criteria: extent to which...                  | Indicators   | Main data sources   |
|--|---|--|---|
| 2.2 How efficient has the performance of the Horizon Europe been against <b>administrative targets</b> ? | EU administration was efficient                         | Time-to-inform<br>Time-to-sign<br>Time-to-grant<br>Time-to-pay<br>Administrative expenditure ratio of Horizon Europe   | implementation data on administrative expenditure (ABAC, CORDA, DG BUDG)  |
| 2.3 How do expected benefits compare to the costs Horizon Europe gave rise to?                           | Horizon Europe delivered <b>value for money</b>         | Committed and spent <b>operational expenditure</b> [EUR] of Horizon Europe<br>Committed/spent <b>administrative expenditure</b> of the EU public sector of Horizon Europe [EUR]<br><b>Costs of applicants</b> to Horizon Europe [person-days, EUR] (benefits = <b>Wider-economic impact</b> of Horizon Europe)<br>Comparison of expected macroeconomic impact relative to incurred total cost to society   | <ul style="list-style-type: none"> <li>- Macroeconomic impacts: modelling Rhomolo, Nemesis</li> <li>- Surveys of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023</li> <li>- Financial implementation data (European Commission)</li> </ul>           |
| 2.4 How efficient has been the performance of Horizon Europe's <b>simplification</b> measures?           | European Partnership landscape was rationalised         | % of public consultation respondents who 'agreed' or 'strongly agreed' that the rationalisation of European Partnerships had <ul style="list-style-type: none"> <li>• allowed additional public and private investments in research and innovation to be leveraged</li> <li>• led to delivering more solutions for the benefits of society, the environment, and the economy</li> </ul> Qualitative feedback on perceived change by stakeholders | <a href="#">Replies to public stakeholders' consultation</a><br>Digital and Industrial Transition evaluation study<br>Green Transition evaluation study<br><br>Surveys of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023                            |
|  | European Partnership administrative costs are efficient | <ul style="list-style-type: none"> <li>- Administrative cost ratio, including benchmarking.</li> <li>- Comparison between administrative cost intensity and direct leverage factor</li> </ul>  | Partnerships' individual evaluation reports (links in Annex 2)  |
|  | Lump sum funding delivered simplification benefits      | Reduction of financial reporting burden experienced by lump sum grant beneficiaries [person-days; EUR]<br>change in proposal preparation costs for lump sum grant applicants (relative to actual cost grants) [person-days]<br>qualitative feedback from applicants and beneficiaries of lump sum grants   | Two targeted surveys of lump-sum grant applicants and beneficiaries, and matched actual cost grant applicants and beneficiaries (autumn 2023, summer 2024)<br><a href="#">Assessment</a> of lump sum funding in Horizon 2020 and Horizon Europe, September 2024<br>CORDA data |



| Questions | Judgement criteria:<br>extent to which...  | Indicators  | Main data sources  |
|-----------|--|---|--|
|           |  |   | Surveys of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023  |
|           | Horizon Europe has <b>potential for further simplification</b> , with respect to application, proposal evaluation and grant implementation processes | -Total expected financial reporting reduction for lump sum grant beneficiaries [EUR]<br>- Potential of the “Personnel unit costs” measure to reduce financial reporting cost of actual cost grant. [qualitative]<br>- potential for simplification in implementation processes raised by applicants and beneficiaries | Two targeted surveys of lump-sum grant applicants and beneficiaries, and matched actual cost grant applicants and beneficiaries (autumn 2023, summer 2024)<br>Surveys of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023<br>5 evaluation studies (links in Annex 2) |

### 3. Coherence

| Questions   | Judgement criteria:<br>extent to which...                                      | Indicators  | Main data sources  |
|---|--|---|--|
| 3.1. How coherent has the R&I Framework Programme been between its programme parts and with other EU programmes serving similar objectives and with national, regional and international initiatives? | implementation of Horizon Europe was consistent <i>between programme parts</i> | % of beneficiaries that plan joint activities   | Targeted survey  |
|   |  | Number of collaborations planned with Pillar III  | Innovative Europe evaluation study (link in Annex 2)   |
|   |  | Number of beneficiaries transiting from EIT and ERC to the EIC measures   | EIC Work Programme 2023<br>Innovative Europe evaluation study (link in Annex 2)  |
|   | Horizon Europe has worked in synergy <i>with other relevant EU programmes</i>  | Balance between lower and higher TRLs   | Horizon Dashboard, as of 20 September 2024<br>Digital and Industrial Transition evaluation study (link in Annex 2)<br>Green Transition evaluation study (link in Annex 2)<br>Resilient Europe evaluation study (link in Annex 2) |
|   |  | Degree to synergies with other EU programmes listed in Annex IV of the regulation establishing Horizon Europe have been implemented | 5 evaluation studies (links in Annex 2)<br>EISMEA internal monitoring data<br>CINEA internal monitoring data   |
|   |  | % of Horizon Europe beneficiaries that have sought additional funding for their research projects from other EU programmes          | Survey of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023   |
|   |  | Number of unsuccessful project proposals awarded a Seal of Excellence   | Horizon Dashboard data, as of 6 January 2025   |

| Questions | Judgement criteria:<br>extent to which...                            | Indicators  | Main data sources  |
|-----------|--|---|--|
|           |  |   | EISMEA monitoring data<br>DG RTD monitoring data<br>DG EAC monitoring data         |
|           |  | % of joint European Partnership calls for research and / or innovation proposals (together with other Partnerships) | Partnerships Biennial Monitoring Report (link in Annex 2)                          |
|           | Horizon Europe has worked in synergy <i>with national programmes</i> | Number of beneficiaries transitioning from national support measures to the EIC                                     | EIC Work Programme 2023<br>Innovative Europe evaluation study (link in Annex 2)    |
|           |  | % of unsuccessful applicants responding that the Seal of Excellence was helpful for obtaining alternative funding   | Survey of Horizon Europe beneficiaries and unsuccessful applicants, May-July, 2023 |
|           |  | Number of national and/or regional Seal of Excellence support schemes set up in the Member States                   | Excellent Science evaluation study (link in Annex 2)                               |

#### 4. EU added value

| Questions  | Judgement criteria:<br>extent to which...  | Indicators   | Main data sources   |
|--|--|--|---|
| 4.1. What was value resulting from the FP that is additional to the value that could result from interventions which would be carried out at regional or national level? | Horizon Europe leveraged additional resources for R&I                                  | Leverage factor of partnerships  | Partnerships Biennial Monitoring Report (link in Annex 2)<br>CORDA dashboard, data as of 31/12/2023<br>eGrants dashboard, data as of 31/12/2023<br>Annual Activity Reports of partnerships<br>European Court of Auditors 2022 Annual report on EU Joint Undertakings<br>Figures provided by individual partnerships |
|  | research and innovation activities would not have been possible without Horizon Europe | % of respondents who found that Horizon Europe funding provides funding for research topics or fields not covered in national or regional R&I funding programmes | Excellent Science evaluation study, Appendix F (link in Annex 2)  |
|  |  | Existence of grants equivalent to Horizon Europe in Widening countries   | Excellent Science evaluation study, case study 6 (link in Annex 2)  |

| Questions | Judgement criteria:<br>extent to which...   | Indicators  | Main data sources                 |
|-----------|---|---|-----------------------------------|
|           | funding (i.e. through other national or regional support)                               | Existence of national programmes equivalent to Horizon Europe in the field of security research (Cluster 3) | Resilient Europe evaluation study |
|           | International cooperation in R&I strengthened Europe's competitiveness and partnerships | Combined annual financial contribution of the Associated Countries  | DG RTD internal calculations      |

## 5. Relevance

| Questions   | Judgement criteria:<br>extent to which...  | Indicators  | Main data sources   |
|---|--|---|---|
| 5.1. How relevant has the support to innovation by the Framework Programme (FP), including partnerships, been given the stakeholders' needs and considering the scientific, technological and/or socio-economic problems and issues identified at the time of its design and over time? | The FP (including partnerships) responded to the <i>needs</i> of beneficiaries                       | % of respondents who were satisfied with blended finance in Horizon Europe<br>Support for coverage of low TRLs  | <a href="#">Replies to stakeholders' consultation</a><br><a href="#">Horizon Europe monitoring data</a>                     |
|   | The FP strengthened Europe's competitiveness   | EU research and development expenditure relative to GDP<br>% of private R&D investment<br>Number of companies with the status of unicorns<br>Innovation index indicator   | DG RTD, SRIP  |
|   | The FP demonstrated that it was <i>flexible</i> in responding to emergencies and changing priorities | Extent to which Horizon Europe responded to unforeseen and emergency circumstances, such as the COVID-19 pandemic and Russian invasion of Ukraine<br>% of respondents who "strongly agreed" or "rather agreed" that Horizon Europe gives more flexibility to respond to changing socio-economic needs compared to national and/or regional research funding | 5 impact area evaluation studies (links in Annex 2)<br><br>Targeted evaluation survey of Horizon Europe beneficiaries       |
|   | New programme governance   | Extent to which co-creation approach improved the coherence of Horizon Europe's programme.<br>% of respondents who found that co-creation process with the relevant Commission services contributed either somewhat or  | Digital and Industrial Transition evaluation study (link in Annex 2)<br>Green Transition evaluation study (link in Annex 2) |

| Questions | Judgement criteria:<br>extent to which... | Indicators   | Main data sources  |
|-----------|---|--|--|
|           |   | to a great extent to strengthening the impact of European research and innovation  | Strategic Plan<br><a href="#">Replies to stakeholders' consultation</a>  |
|           | Monitoring and reporting                  | Extent to which the monitoring and reporting requirements outlined in the regulation establishing Horizon Europe are being met   | Corda system   |
|           | EU Missions' design and governance        | Extent to which the Missions' design is "bold and inspirational", with "wide, scientific, technological, societal, economic, environmental or policy relevance and impact" as foreseen by the regulation establishing Horizon Europe | The Commission Communication on the assessment of EU Missions two years on (link in Annex 2)<br>Missions' implementation plans     |
|           | Directionality of European Partnerships   | Average % of partnership funding allocated to the strategic priorities   | Partnerships Biennial Monitoring Report (links in Annex 2)<br>Digital and Industrial Transition evaluation study (link in Annex 2) |

## Annex 4 Efficiency - underlying analysis and additional detail

This annex contains the underlying analysis and additional detail summarised in section 4.2 (efficiency) of the main evaluation report.

### 4.1 Costs of Horizon Europe's affected stakeholder groups

#### 4.1.1 Beneficiaries' administrative costs

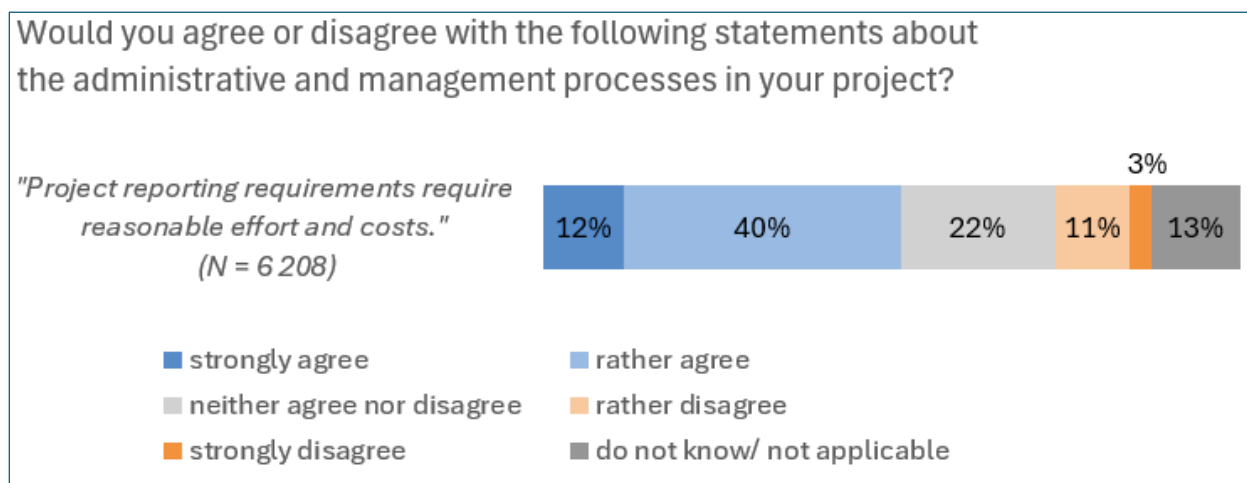
**Beneficiaries** incur **administrative costs** to fulfil specific obligations, set out in their grant agreement that would otherwise not have been incurred to manage the project. While beneficiaries are compensated for all administrative costs through grant payments, any avoidable part of this effort negatively affects the programme's overall efficiency.

##### i) Qualitative evidence on beneficiaries' administrative costs

While **around half of the beneficiaries agree to some extent that project reporting requires reasonable effort and costs**, for most these are **just about reasonable (i.e at the border to unreasonable)**. In response to the statement '*Project reporting requirements require reasonable effort and costs*', (Figure 8), 40% of Horizon Europe beneficiaries 'rather agree' (2455 respondents) and 22% (1378) 'neither agree nor disagree'. Explicit disagreement with the statement (14%, 855) but also strong agreement (12%, 727) are less frequent.

Beneficiaries' feedback in response to the open question of the targeted survey (see also Annex 4.5.2) illustrate their concerns. Twenty-one beneficiaries stated their administrative burden was far too high and negatively affected the work on their project. Topics that were raised as problematic by other respondents included, for instance: the number and formatting of required deliverables, a lack of sufficient user-friendly and tailored information on how to implement the own grant, and the cumbersome nature of updates emailed by the web portal.

Figure 8: Beneficiaries – extent of effort of project reporting (“reasonable”)



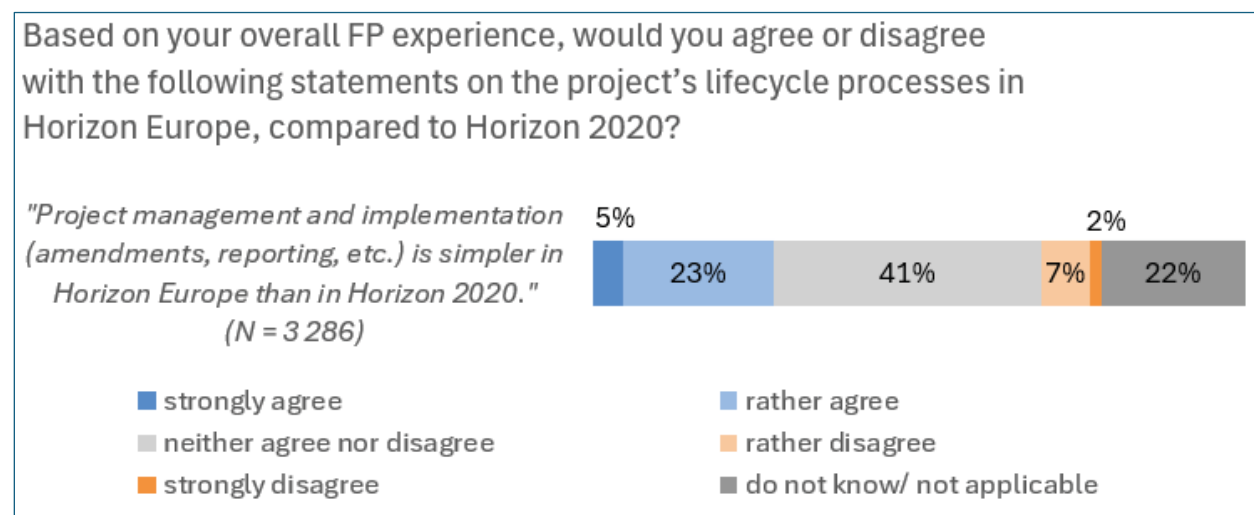
Source: Based on 6208 responses to question of targeted survey of Horizon Europe beneficiaries and applicants.

**Beneficiaries have not experienced any substantial change in the effort involved in project management and implementation compared to Horizon 2020.** 41% of Horizon Europe beneficiaries (1350 respondents) 'neither agree nor disagree' that processes have become simpler



and 23% (760) ‘rather agree’. Explicit disagreement (9%, 304), but also strong agreement (5%, 150) that processes have become simpler are less frequent (Figure 9).

Figure 9: Beneficiaries - project management and implementation compared to Horizon 2020



Source: Based on 3286 responses to question of targeted survey of Horizon Europe beneficiaries and applicants.

#### ii) Quantitative evidence on beneficiaries’ administrative costs

To better understand the size of the required administrative effort, the evaluation gathered **quantitative evidence on beneficiaries’ administrative costs relative to the total project costs** from **5 161 Horizon Europe beneficiaries responding to the targeted survey question**. Respondents were asked “What is the percentage share of your Horizon Europe project budget that is spent on administrative tasks (e.g. project reporting, project financial management, and similar)?” and could choose from cost the ranges: Less than 1%, 1-3%, 4-5%, 6-10%, 11-15%, 16-20%, More than 20%.

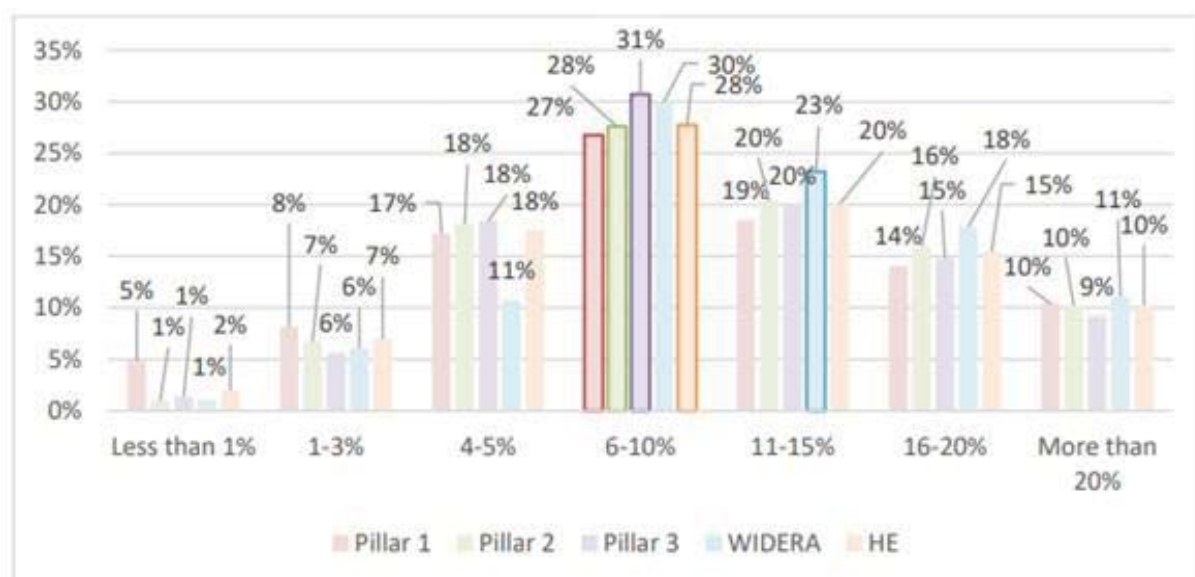
The survey data does not make it possible to assess the administrative *burden* of Horizon Europe in a strict sense: It is **not possible to determine which share of the cost covers administrative tasks (e.g. reporting obligations) that are additional to those that would have been associated with the running of the projects in any case**.

Responses suggest that for the different programme parts, with a few exceptions, the median and the most frequent responses indicate that **6% to 10% of the project budget are allocated to administrative tasks**. Depending on programme part, this response was chosen by 23% to 38% of respondents. In contrast, **EIC Accelerator** respondents most frequently indicated costs of 4-5% (29% of responses), **Research Infrastructures** respondents 11-15% (29% of responses), and the median response for **WIDERA** was higher and fell into the 11%-15% bracket.

The median cost range of 6%-10% also applies when only considering consortium-run projects. While the **median coordinator of a consortium**, when assessed separately, **reported a higher range of 11% to 15%**, although even here the most frequently indicated administrative cost (mode) fell into the range of 6%-10% of the project budget.

Looking at the shares of respondents, who indicated **very high administrative costs** of ‘more than 20%’ of the project budget by type of organisation, **Research funding organisations/agencies** (16% chose ‘more than 20%’, 15 responses), **Civil society/NGOs** (12%, 34) and **Universities/Higher Education institutions** (11%, 196) are in the lead. For most of the other types of organisations (SMEs, Public research centre, Private research centre, Start-Ups, Large Enterprises, External experts) 7% of respondents reported this very high administrative costs bracket.<sup>65</sup>

Figure 10: Targeted survey responses to question: “In your estimation, what is the percentage share of your Horizon Europe project budget that is spent on administrative tasks (e.g. project reporting, project financial management, and similar)?”



Source: targeted survey of Horizon Europe beneficiaries and applicants, as reported in Evaluation Support study on Excellence Science, annex 7, Median value indicated by thicker line<sup>66</sup>

<sup>65</sup> Complemented by respondents, whose organisations fell under “Other” (11%, 46) and “Not in survey” (5%, 61). One respondent who were *Incubator* and *Spin-Off* respectively selected the highest cost bracket.

<sup>66</sup> Due to a clerical error, Excellence Science Annex 7, p.271 quotes an incorrect survey question in the figure.

Table 6: Administrative costs of Horizon Europe beneficiaries by programme part.

| <b>Horizon Europe Programme Part</b> | <b>No. of total survey responses</b> | <b>Beneficiaries' administrative costs [% of project cost ] (median)</b> | <b>Beneficiaries' administrative costs [% of project cost ] (mode)</b> |
|--------------------------------------|--------------------------------------|--|--|
| <b>ERC</b>                           | <b>226</b>                           | 6-10%  | 6-10%  |
| <b>MSCA</b>                          | <b>879</b>                           | 6-10%  | 6-10%  |
| <b>INFRASTRUCTURES</b>               | <b>169</b>                           | 11-15%   | 11-15%   |
| <b>Cluster 1</b>                     | <b>350</b>                           | 11-15%   | 6-10%  |
| <b>Cluster 2</b>                     | <b>324</b>                           | 11-15%   | 6-10%  |
| <b>Cluster 3</b>                     | <b>152</b>                           | 6-10%  | 6-10%  |
| <b>Cluster 4</b>                     | <b>678</b>                           | 6-10%  | 6-10%  |
| <b>Cluster 5</b>                     | <b>738</b>                           | 6-10%  | 6-10%  |
| <b>Cluster 6</b>                     | <b>710</b>                           | 6-10%  | 6-10%  |
| <b>Missions</b>                      | <b>319</b>                           | 11-15%   | 6-10%  |
| <b>EIC Accelerator</b>               | <b>95</b>                            | 6-10%  | 4-5%   |
| <b>EIC Pathfinder</b>                | <b>152</b>                           | 11-15%   | 6-10%  |
| <b>EIC Transition</b>                | <b>24</b>                            | 6-10%  | 6-10%  |
| <b>EIE</b>                           | <b>66</b>                            | 6-10%  | 6-10%  |
| <b>WIDERA</b>                        | <b>279</b>                           | 11-15%   | 6-10%  |
| <b>Horizon Europe overall</b>        | <b>5161</b>                          | <b>6-10%</b>   | <b>6-10%</b>   |

Source: Responses to targeted survey of Horizon Europe beneficiaries and unsuccessful applicants.

A regression analysis of the factors that increase administrative costs of beneficiaries<sup>67</sup> shows that for Pillar II, the **thematic cluster** plays a role. In particular, the share of **resources dedicated to administrative tasks tends to be lower in the thematic clusters 3, 4 and 5**, while the reporting process is perceived as **less proportionate in clusters 1 and 2**. This could reflect slight differences in project reporting requirements and management practices between clusters and associated managing entities. On the other hand, **no significant differences in (perceived) administrative costs is observed for coordinators, for participants with previous FP experience or for participants who outsource the project management tasks to a third party or department. No differences are found either when focusing on administrative costs by consortium size.** As shown in Table 7 below, beneficiaries spend around 6% to 10% of its project costs in administrative tasks, with median and mode values showing similar results in all categories.

<sup>67</sup> Methodology described in Annex 2, section 15. See also: Interim evaluation support study: working paper: analysis of factors affecting applicants' and beneficiaries' costs of project application and administration processes in Horizon Europe's Pillar II ([doi/10.2777/412609](https://doi.org/10.2777/412609)).

Table 7: Administrative costs by consortium size

| <i>Administrative costs by consortium size</i> | Sample | Beneficiaries' administrative costs [% of project costs] (median by number) | Beneficiaries' administrative costs [% of project costs] (mode) |
|--|--------|---|---|
| <i>Mono beneficiaries</i>                      | 564    | 6-10%   | 6-10%   |
| <i>2-14 participants</i>                       | 2243   | 6-10%   | 6-10%   |
| <i>15-30 participants</i>                      | 1931   | 6-10%   | 6-10%   |
| <i>31+ participants</i>                        | 423    | 6-10%   | 6-10%   |

Source: Responses to targeted survey of Horizon Europe beneficiaries.

#### *Estimate of total administrative cost of beneficiaries*

In total, **all projects signed under Horizon Europe so far**, over their entire project lifetime, are expecting to spend **between EUR 4.7 billion and EUR 6.5 billion in administrative costs**. This corresponds to between 9% and over 12% of the total project cost so far. To estimate this total administrative cost of beneficiaries, the evaluation used monitoring data of the project costs, aggregated at the level of programme part. It then aggregated the survey responses at the level of programme parts and used the shares of respondents selecting each cost range as a weight, to be applied to the lower and upper bound (percentages) of each range, to then multiply them with the project cost total of the relevant programme part. Adding up over all cost segments generated the total range. As the answer 'more than 20%' does not express an upper limit, it was necessary to make an assumption. The estimate assumes that no beneficiary would engage in a project that allocated more than a quarter of the project costs to administrative tasks leads to an upper bound estimate of EUR 6.5 billion.

**The Horizon Europe estimate of the total administrative cost is orders of magnitudes higher than that estimate of the Horizon 2020 final evaluation**, which ranged between EUR 135 million to EUR 215 million over the entire framework programme. However, the **differences between the two estimates are likely driven by the change in the survey question design and the improvement in data quality, rather than actual underlying changes in beneficiaries' administrative costs**.

The Horizon 2020 estimate had used a median time cost of 4.5 - 7 person-days per month of project duration at programme level from the (not representative) **public consultation responses**. The **uncertainty around the Horizon 2020 estimates was very high**. The attribution to the framework programme requirements was similarly unclear at the time. The format of the previous question was not repeated in this evaluation, as it had been difficult to answer. The new question format may be easier to answer but, however, it is also much less granular (e.g. 0.1% of total project cost is equivalent to EUR 44 million) and may contribute to higher estimates.

#### 4.1.2 Cost of applicants

**Successful and unsuccessful applicants**, the largest stakeholder group of Horizon Europe, incur **application costs** when preparing and submitting their proposals. Application costs are one of the framework programme's costs on EU Society and influence its value-for-money. They are partially unavoidable as quality proposals require effort up front to then allow for the most promising projects to be identified, which in turn maximises the chances of generating higher benefits for society. At the same time, they have the potential to introduce inefficiencies into the programme. **As the total number of applicants is very high and the vast share of applicants is unsuccessful, a small avoidable burden in the application process has the potential to introduce a sizeable inefficiency into the programme.**

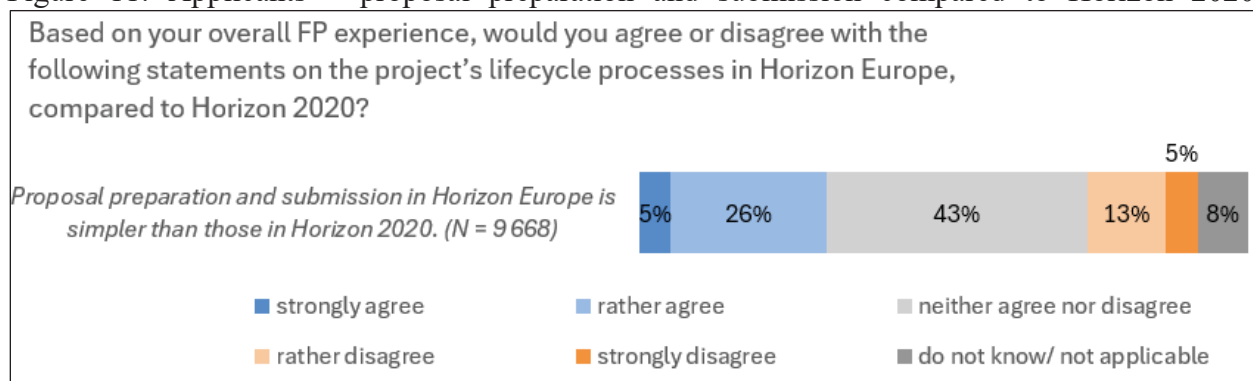
The evaluation's targeted survey of the population of applicants and beneficiaries collected a qualitative and quantitative evidence base from 17 254 respondents,<sup>68</sup> of which **64% (11 028) were unsuccessful applicants** and **36% (6 226) successful applicants**.

##### 4.1.2.1 Costs of applicants – qualitative evidence

**For 42% of respondents, the 'overall effort to prepare a proposal was acceptable'** to a 'large extent' (32%, 5 443 respondents) or a 'very large extent' 10% (1733), while 32% were less supportive of the statement ('moderate extent') and **around a quarter of applicants effectively did not find the required effort acceptable**, of which 7% (1 264) 'not at all' and 17% (2990) 'to a small extent'.

**Applicants have not experienced any substantial change in the effort involved in proposal preparation and submission compared to Horizon 2020**, with 43% of Horizon Europe applicants (4143 respondents) neither agreeing nor disagreeing that proposal preparation and submission have become simpler. The share of respondents who experienced some simplification (31%) is larger than the share who disagree (18%) that application processes have become simpler (Figure 11). This corresponds with the feedback that had been received in the public consultation<sup>69</sup> (Annex 5, Figure 74), in which 74% (1037) of respondents observed a "similar" application burden, while 17% (246) reported a "greater" burden.

Figure 11: Applicants – proposal preparation and submission compared to Horizon 2020



Source: Based on 9 668 responses to question of targeted survey of Horizon Europe beneficiaries and applicants.

<sup>68</sup> Excluding 121 responses of 'cannot say'.

<sup>69</sup> Annex 5 Fig. 46 (%ages "cannot say" removed); Evaluation study on Innovative Europe, Annex 10.3.2.5, p.615.



### *Proportionality of the application costs*

The targeted survey of the evaluation collected detailed feedback on questions about the proportionality of applicant costs, which makes it possible to assess proportionality relatively, against different points of comparison<sup>70</sup>.

**Relative to the complexity of the proposed projects, almost two in three applicants find the overall effort proportionate<sup>71</sup> and few (13%) find it disproportionate<sup>72</sup>.** (Figure 12, chart 3)

**Over half of the applicants (58%<sup>73</sup>) see the application effort as proportionate to the number of consortium partners involved, with again few (12%<sup>74</sup>) finding it disproportionate.** (Figure 12, chart 4).

**Considering the size of the grant, around half of the applicants find their application cost to be proportionate<sup>75</sup>, while only one in six applicants (17%) effectively disagree<sup>76</sup> that the total time and resources needed are in proportion with the financial support.** (Figure 12, chart 2)

**The pattern of the applicants' responses changes considerably, when the chances of success (securing Horizon Europe funding) are taken into account** (Figure 12 chart 5). In this context, **only a third of applicants (34%<sup>77</sup>) still rate their application effort as proportionate**, whereas about as many (40%<sup>78</sup>) rate their application effort as no longer as proportionate.

Feedback from applicants to the **survey's open question** confirms and illustrates this finding. Around one quarter of the contributions<sup>79</sup> on the topic of application (45 out 189<sup>80</sup>, 24%) **raise strong concerns that the total amount of effort spent on proposals is disproportionate to the chances of success**. The responses were sent by from applicants from a wide range of Horizon Europe programme parts.<sup>81</sup> For instance, two respondents report i) difficulties to motivate employees to spend time looking for consortia and participating in proposals due to the disproportionate effort and ii) their decision to not apply anymore to the programme. (Cluster 4<sup>82</sup>)

Taken together, the qualitative evidence on a lack of **proportionate application cost in light of the chances of success supports a strong finding, in particular given the increased success rates and budget of Horizon Europe**.

Some respondents to the survey's open question suggest measures to lower the effort involved in applications. For instance, at least 20 separate contributions, most of them from **ERC applicants**,

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<sup>70</sup> The assessment treats and agreement "to small extent" as an expression of a disagreement to some extent, to account for potential bias introduced by the asymmetric answers.

<sup>71</sup> 45% 'to a large' (7 801 respondents) and 15% 'to a very large' (2 596 respondents)

<sup>72</sup> 10% 'to a small extent' (1 747 respondents) and 3% 'not at all' (536 respondents)

<sup>73</sup> 44% 'to a large' (5 337 respondents) and 12% 'to a very large' (1 495 respondents)

<sup>74</sup> 10% 'to a small extent' (1 180 respondents) or 2% 'not at all' (299 respondents).

<sup>75</sup> 40% 'to a very large extent' (6 885 respondents) and 13% 'to a large extent' (2 200 respondents).

<sup>76</sup> 12% 'to a small extent' (2 094 respondents) and 5% 'not at all' (778 respondents).

<sup>77</sup> 24% 'to a large extent' (4 051 respondents) and 10% 'to a very large extent' (1 759 respondents).

<sup>78</sup> 21% 'to a small extent' (3 652 respondents) and 18% 'not at all' (3 109 respondents),

<sup>79</sup> The application phase is the topic that received most specific and informative responses to the targeted survey's open question, of which most discuss potential for further simplification and are reported in Annex 4.5.3.

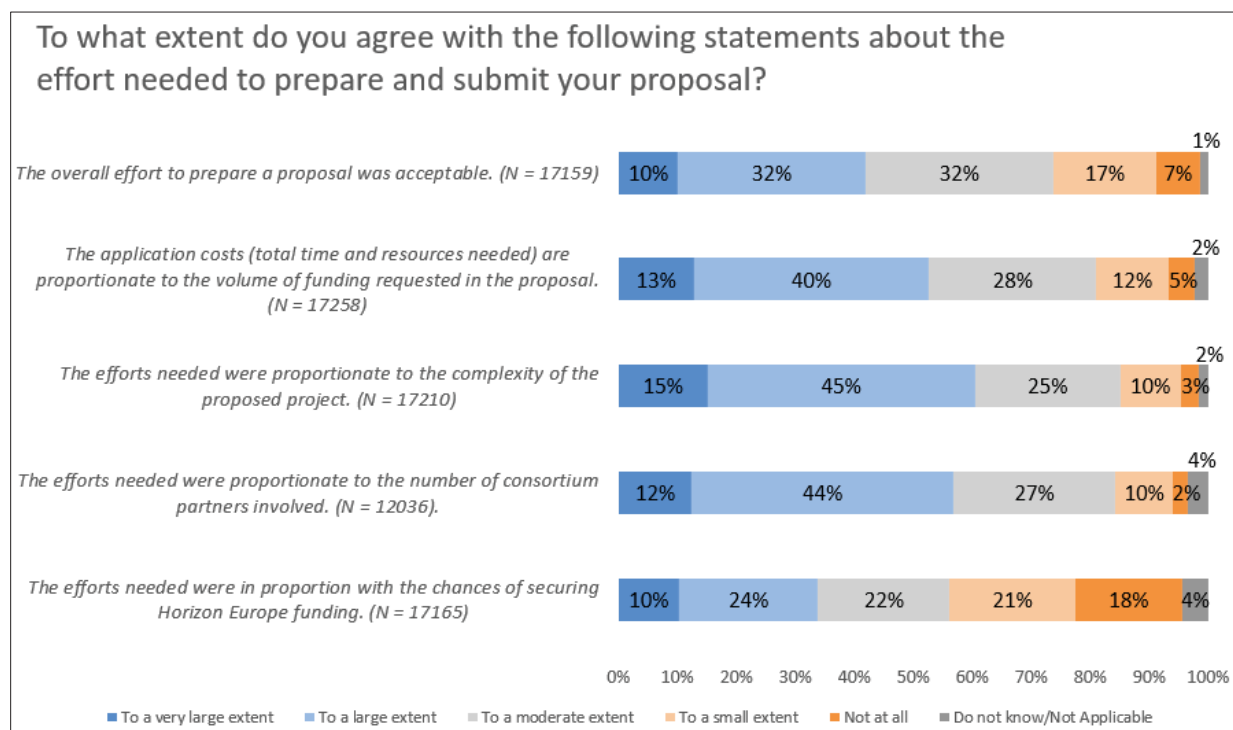
<sup>80</sup> 4849 responses to open questions, of which 189 reported in evaluation as particularly informative/sufficiently specific. Topics: application process (84), proposal template (42), web portals, guidance (35), use of consultants (37). See annex 4.5

<sup>81</sup> MSCA PF: 2 MSCA DN:7, ERC: 6, INFRA: 1, C1: 4, CL2: 1, CL3: 1; CL4: 7, CL5: 8, CL6: 2, EIC Accelerator: 2, EIC Pathfinder: 2, WIDERA: 1, Mission: 1.

<sup>82</sup> Examples from (one unsuccessful and one successful) Cluster 4 applicants.

suggest that the use of **two-stages application process** - where the second part must only be submitted if the first part is successful- should be applied (more widely) to reducing.

Figure 12: Proposal preparation effort



Source: Targeted survey of Horizon Europe beneficiaries and applicants. (2023) The assessment counts agreement “to small extent” as an expression of a disagreement to some extent, to account for potential bias introduced by the asymmetric answers.

A further breakdown of the **responses by programme part** (Figure 13) reveals relevant variation. In particular, **EIC and ERC applicants flag with most clearly that their application costs are not proportionate to the chances of securing funding**. The most concerning responses came from the **EIC Accelerator**, where just over half (52%)<sup>83</sup> of the responding applicants pointed at disproportionate application costs in chances of success, of which a particularly high share (29%) were very negative responses. A similarly strong signal comes from **EIC Pathfinder** applicants (45%429 respondents, of which 23% very strongly negative).

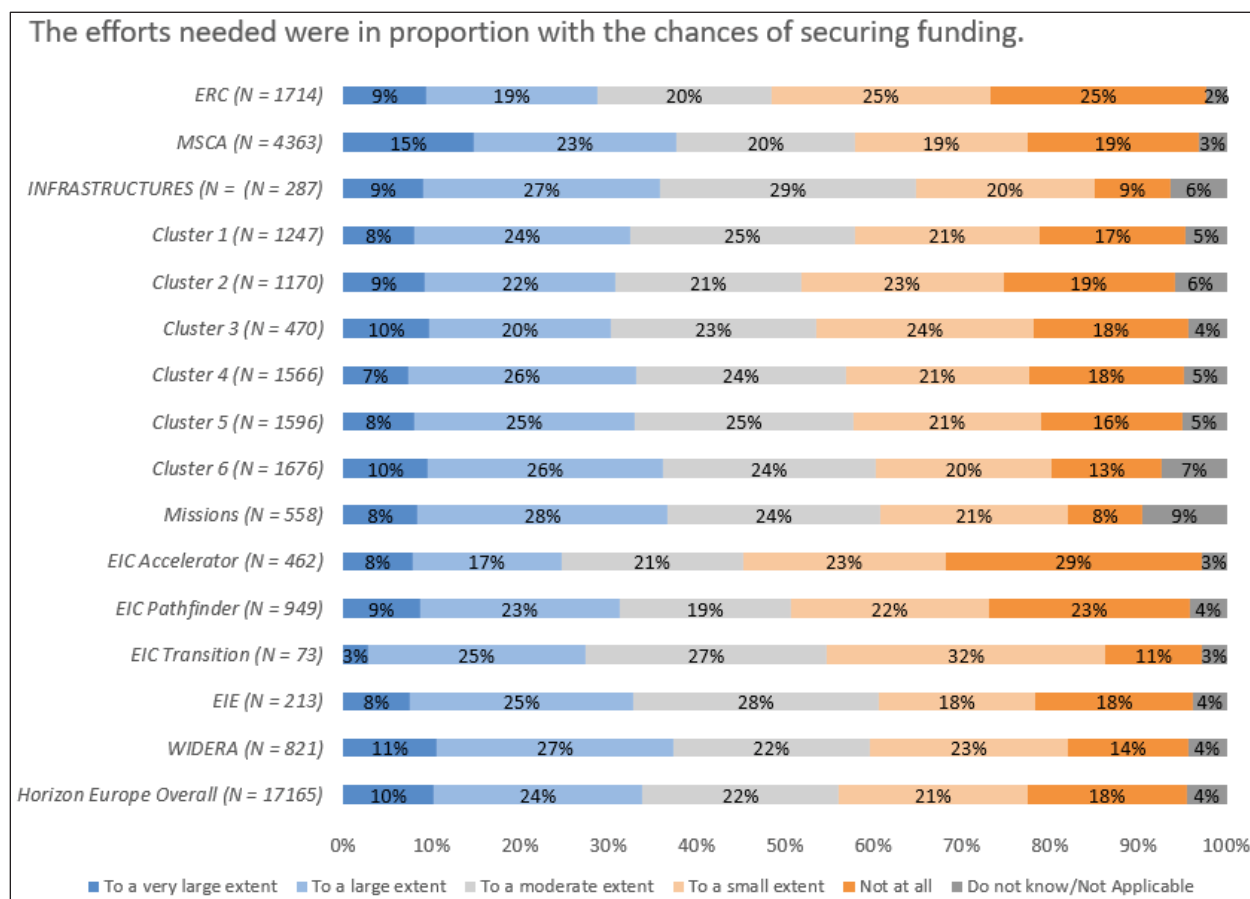
Some of this may be linked to the **EIC’s former application platform** with integrated AI (no longer in use). Five detailed responses from EIC applicants to the survey’s open question pointed to the platform adding to the applicants’ burden. One EIC Accelerator applicants reported: ‘*This was an awful experience in which we had to waste the consultant support to understand the web platform, instead of focusing on business or other more important aspects.*’ (See also Annex 4.5.3 on the potential for further simplification (application phase).

The concern about strongly disproportionate costs in light of success were further shared by **ERC** applicants (around 50%, 845 respondents, of which 25% strongly negative), and **EIC Transition** applicants (42%, 31 respondents). In the other programme parts, disproportionate application costs in chances of success were flagged by relatively large shares of applicants of **Cluster 2** (42%, 495

<sup>83</sup> i.e. either agreed ‘to a small extent’ (23%; 106 respondents) or ‘not at all’ (29%; 134 respondents)

respondents) and **Cluster 3** (42%, 198 respondents). Discontent among applicants on this topic correlates with proposal success rates, as programme parts showing the lowest success rates are exactly those showing the greatest discontent, namely Cluster 3 (13%), Cluster 2 (14%), EIC (14%) and ERC (14%).<sup>84</sup>

Figure 13: Proportionality of applicant costs relative to chances of success - by programme part



Source: Targeted survey of Horizon Europe beneficiaries and applicants. (2023) The assessment counts an agreement “to small extent” as an expression of a disagreement to some extent, to account for potential bias introduced by the asymmetric answers.

#### 4.1.2.2 Costs of applicants – quantitative evidence and total cost estimation

To obtain robust evidence on costs of applicants the targeted survey asked respondents to **report their organisation’s incurred application time costs under Horizon Europe**. The relevant question asked: ‘In your estimation, how many person-days did your organisation spend in preparing your Horizon Europe proposal?’ Respondents were offered the following options to answer: ‘Less than 5 person-days’; ‘6 to 15 person-days’; ‘16 to 25 person-days’; ‘26 to 35 person-days’; ‘36 to 45 person-days’; ‘46 to 55 person-days’; ‘56 to 65 person-days’; ‘More than 65 person-days’. The question had been chosen as it was considered as easy as possible for

<sup>84</sup> Proposals frozen dashboard as of 2 January 2025.

respondents to estimate. The answer options (bins) were based on evidence from the Horizon 2020 public consultation, which had used a similar question.

In contrast to earlier evaluation evidence on the costs of applicants, such as those from the public consultation and studies with narrower focus used in the Horizon 2020 final evaluation, the **survey responses of this evaluation’s targeted survey covered all applicants, all programme parts and were matched with data from the monitoring database (CORDA)**, which allowed the evaluation to understand, for instance, to which programme part the respondents had applied, whether they had met the quality threshold, had been funded, as well as other characteristic of their proposed project (e.g. duration, grant size, consortium size). **For the first time it is thus possible to quantify the costs associated with the preparation of proposals under the R&I framework programme in a robust way.** In the remainder of the section the findings are presented.

Proposal preparation costs of consortia (multi-beneficiary grants) combine the costs of coordinators, shouldering most of the effort, and those of contributing partners. Overall, the **median consortium coordinator spends between 36 to 45 person-days**, with a mode of **above 65 person-days**. The effort of **contributing consortium partners** is typically lower, with **16 to 25 person-days** per proposal (median and mode). The finding holds across most characteristics, but not for **consortia of > 30 partners**, where **contributing partners** spend on average less with **6 - 15 person-days per proposal** (median and mode).<sup>85</sup>

Table 8: Application Cost: distribution of responses of coordinators and partners

| Application cost | Consortium Coordinators      |                              | Consortium Partners        |                              |
|------------------|------------------------------|------------------------------|----------------------------|------------------------------|
| person-days      | successful<br>(% from total) | unsuccessful<br>(% of total) | successful<br>(% of total) | unsuccessful<br>(% of total) |
| < 5              | 24 (3%)                      | 78 (6%)                      | 358 (11%)                  | 571 (13%)                    |
| 6 to 15          | 34 (5%)                      | 87 (7%)                      | <b>991 (29%) mode</b>      | <b>1 485 (33%) mode</b>      |
| 16 to 25         | 50 (7%)                      | 150 (12%)                    | <b>847 (25%) median</b>    | <b>1 089 (24%) median</b>    |
| 26 to 35         | 117 (17%)                    | 205 (17%)                    | 572 (17%)                  | 633 (14%)                    |
| 36 to 45         | 115 (16%)                    | <b>195 (16%) median</b>      | 328 (10%)                  | 386 (8%)                     |
| 46 to 55         | <b>90 (13%) median</b>       | 113 (9%)                     | 138 (4%)                   | 157 (3%)                     |
| 56 to 65         | 76 (11%)                     | 139 (11%)                    | 71 (2%)                    | 91 (2%)                      |
| > 65             | <b>197 (28%) mode</b>        | <b>246 (20%) mode</b>        | 100 (3%)                   | 148 (3%)                     |
| Total responses  | 703                          | 1 213                        | 3 405                      | 4 560                        |

Source: Excellent Science evaluation study Annex 1.7.3.2, Table 54, p.250. N=9 881

**Mono-beneficiaries** - The median proposal preparation effort of **Pillar I and Pillar III** mono-beneficiaries was comparable to that of coordinators with **36 and 45 person-day**. While mono-beneficiaries do not have to coordinate partners during the proposal preparation phase, they are

<sup>85</sup> Resilient Europe evaluation study, Annex 1.32 p.45

nevertheless required to fulfil most of the same steps as coordinators. The finding is relevant, as some mono-beneficiaries are **worse affected by the same level of cost due to constrained resources**. For instance, this can be assumed to be the case of applicants to **MSCA PF**, who share the same median (and mode) cost range. However, mono-beneficiaries are not homogenous, and costs differ between actions (table below) For the **EIC Accelerator**, it is important to note that proposals apply for substantial grants and equity budgets, through pitching decks and full business plans, which can be used for investment commercialisation purposes beyond the EIC. This is also reflected in the comparatively high share (30%) of EIC Accelerator applicants, particularly successful EIC Accelerator applicants (40%), who reported very high application **costs of over 65 person days**, which is also the most commonly reported cost for this action.

Table 9: Application costs of Pillar I and Pillar III mono - beneficiaries

| Application Costs<br>Mono-beneficiaries | No.<br>responses | Application costs -<br>median<br>[person-days] | Application costs -<br>mode<br>[person-days]       |
|---|------------------|--|--|
| ERC STG                                 | 811              | 36 to 45 person-days                           | 36 to 45 person-days                               |
| ERC COG                                 | 511              | 36 to 45 person-days                           | 26 to 35 person-days                               |
| ERC ADG                                 | 324              | 36 to 45 person-days                           | More than 65 person-days                           |
| ERC POC                                 | 40               | 26 to 35 person-days                           | 6 to 15 person-days                                |
| MSCA PF                                 | 2916             | 36 to 45 person-days                           | 26 to 35 person-days                               |
| MSCA DN                                 | 1203             | 16 to 25 person-days                           | 6 to 15 person-days                                |
| MSCA SE                                 | 189              | 16 to 25 person-days                           | 6 to 15 person-days                                |
| MSCA COFUND                             | 19               | 56 to 65 person-days                           | 56 to 65 person-days;<br>More than 65 person-days* |
| EIC Accelerator                         | 335              | 36 to 45 person-days                           | More than 65 person-days                           |

\* MSCA COFUND application cost was bimodal for ‘56 to 65 person-days’ and ‘More than 65 person-days’. Source: Responses to targeted survey of Horizon Europe beneficiaries and unsuccessful applicants.



**Consortium coordinator time costs vary by type of funding instrument.**<sup>86</sup> While their median time cost for RIA, IA, PCP and COFUND actions is 46 to 55 person-days, those preparing CSA and MSCA(COFUND/DN/SE) proposals typically spend slightly less time, with 36 to 45 person-days, and even less on EIC<sup>87</sup> proposals, which take coordinators typically 26 to 35 person-days to prepare. The step down in costs is plausible, as the highest cost is associated with the group of instruments with the higher grant values (RIA, IA, etc;) suggesting that the higher expected return in case of success makes it worthwhile to spend more effort up front.

**Proposals for longer projects take coordinators also longer to prepare.** Projects lasting up to two years see coordinators typically investing 26 to 35 person-days in proposals, whereas those of two to four years typically take 36 to 45 person days. Coordinators of long projects, proposed to last four years or longer, typically incur even higher time costs of 46 to 55 person-days. For all but the shortest projects up to two years, coordinators most frequently chose the response of “more than 65 person-days”. The share of respondents choosing this mode also increases with project duration, suggesting that a substantial share of longer projects may require proposal preparation times from coordinators of well above 65 days.<sup>88</sup>

**Coordinators that prepared ultimately funded proposals typically spent more time than those of unsuccessful proposals.**<sup>89</sup> The difference is particularly pronounced for projects with a duration of **at least three years**. This could be interpreted as an encouraging result, and a hint that the effort coordinators put into preparing their proposal matters, and that the proposal evaluation process rewards the effort. However, at the same time success is also correlated with the involvement of external contractors assisting with the proposal preparation, which in turn was also found to correlate with longer proposal preparation times.

**Applicants who made use of, or were, consultancies took on average more time (about 10 person-days more for median respondents) to prepare a proposal, compared to the Horizon Europe average. This difference was not observed for coordinators who were themselves consultants, and who reported the same typical time costs as other coordinators. Contributing consortium partners, who were themselves consultants, reported (about 10 person-days) lower than average application time costs.** The observed differences may be due to other characteristics of the type of projects for which consultancies are brought onboard, or be influenced by a combination of experience and coordination costs.

A regression analysis of the factors driving the application effort<sup>90</sup> shows that **consortium coordinators, as well as applicants with previous experience in the framework programme spend significantly more time (in terms of person-days) on the application process.** Coordinators typically lead the proposal, including aspects such as of establishing the consortium and determining the budget for each partner, which increases their application costs. Underlying

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<sup>86</sup> Categories follow in parts those used in the Horizon 2020 Interim evaluation European Commission, Directorate-General for Research and Innovation, Interim evaluation of Horizon 2020 – Commission staff working document, Publications Office, 2017, Annex 1, p. 71 (doi/10.2777/220768)

<sup>87</sup> EIC Pathfinder and EIC Transitions. Based on 1916 responses over the three groups.

<sup>88</sup> Resilient Europe evaluation study, Annex 1.3.2, Figure16.

<sup>89</sup> Excellent Science evaluation study, section 4.1.2.

<sup>90</sup> Methodology described in Annex 2, section 15. See also: Interim evaluation support study: working paper - analysis of factors affecting applicants' and beneficiaries' costs of project application and administration processes in Horizon Europe's Pillar II (doi/10.2777/412609).

reasons for higher application costs of organisations with previous framework programme experience are less clear. It might reflect an increased involvement in the proposal phase, as consortia tend to rely strongly on participants with more experience to develop the proposal. An alternative and complementary factor could be that experienced applicants invest more time in the proposal, as their first-hand experience with the programme has led them to have better information on the level of competition for funding. Finally, another measure of the application effort – the perception of the effort by the applicant, including the perception of the feasibility and the clarity of the call – is significantly influenced by the size of the consortium. **A higher number of consortium partners leads to a higher proposal effort for the coordinator**, which is an expectable and intuitive result considering coordination costs.

**Consortium size was more strongly correlated with a higher effort of proposal preparation for coordinators than grant size and project duration.**<sup>91,92</sup> Coordinators of consortia with only **one partner** typically spend **26 to 35 person-days**, consortia with **2-14 partners** see coordinators typically investing **36 to 45 person-days** in proposals, while those of **15-30 partners** typically take **46 to 55 person days**. Above **30 partners** coordinators typically spend **56 to 65 person days** (median), with a higher mode suggesting a **large share** of coordinators<sup>93</sup> taking **well above 65 person-days**. Survey responses suggest that the required effort increases in steps, by **about ten person-days for every additional 15 partners**.

#### *Estimation of the total application cost of Horizon Europe*

The availability of detailed data on application efforts via the survey allows for a more robust quantification and monetisation of application costs at programme level. It is estimated that **the total cost of proposal preparation of all applications**<sup>94</sup> **to Horizon Europe so far ranges between EUR 1.9 billion and EUR 2.8 billion**. Divided by the total number of proposals submitted so far, this implies an average cost of proposal preparation in the range of EUR 21 000 to EUR 32 000. A previous estimate in the final evaluation of Horizon 2020 had arrived at an average proposal preparation cost of EUR 18 000 to EUR 37 000 for applicants. The difference between the two estimates is driven by a change in data source, with the newer estimate being the more robust one.

The estimate analysed the number of days dedicated to the application process and differentiated applicants based on their role and the size of their consortium. More specifically, applicants are grouped into five ‘sizes’, from mono-beneficiary applications, very small consortia with one additional partner, consortia with 2 to 14 partners, consortia with 15 to 30 partners, and consortia with over 30 partners. In addition, applicants from consortia are separated according to their role into coordinator or partner. Using these two stratification factors supports the robustness of the quantification exercise, as the analysis presented above points at their strong influence (consortium size and the role of the applicant as coordinator) on a proposal’s preparation time. The estimated

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<sup>91</sup> Resilient Europe evaluation study, Annex 1.3.2, Figure 17, page 44 – 45.

<sup>92</sup> Further, the size also dominated when looking at the variation in effort of proposal preparation in combination with grant size and project duration. Consortium size, grant size and project duration are strongly correlated, and the evaluation did not attempt to isolate the effect of consortium size on time costs.

<sup>93</sup> 44% of responding coordinators from consortia with above 30 partners chose the answer “56 to 65 person-days”, however, this share is only based on a total of 15 respondents.

<sup>94</sup> EIC Accelerator applications were excluded due to insufficient availability and quality of the data.

total application cost is then calculated by multiplying the number of days of each stratum (median response) - successively the lower and higher bound of the bracket - by the corresponding number of applicants to Horizon Europe so far, and then by the standard labour cost for administrative burden.<sup>95</sup>

The above estimate represents the total cost of Horizon Europe's applicants up to now and does not cover all seven years. When scaled up to the entire framework programme period, using to relative sizes of the currently committed operational expenditure up to 2024 and the total operational expenditure available for Horizon Europe until 2027, the total application cost of Horizon Europe (2020-2027) is expected to range between **EUR 3.0 billion and EUR 4.4 billion, or EUR 34 000 to EUR 50 000 per EUR 1 committed million operational expenditure.**

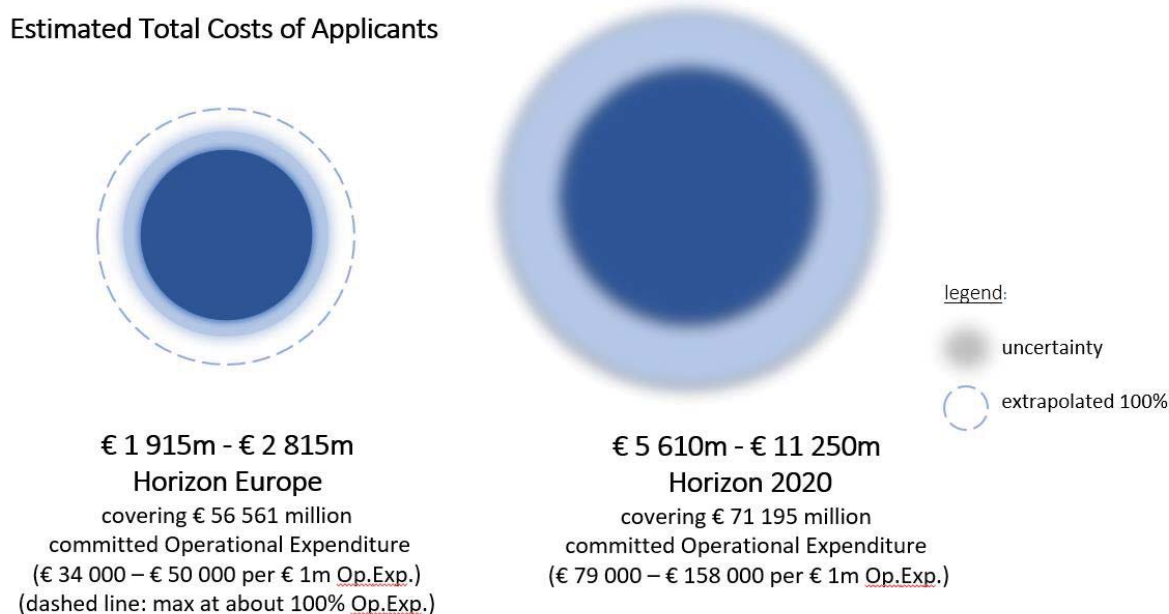
In comparison, the **Horizon 2020** final evaluation estimated that the total application cost amounted to EUR 5.61 billion to EUR 11.25 billion over its entire programme period, which is **EUR 79 000 to EUR 158 000 per EUR 1 million of operational expenditure.** However, the confidence around Horizon 2020 estimate is very low due to its weak evidence base<sup>96</sup>, which means that **the difference between the Horizon 2020 and Horizon Europe total application cost values is primarily the result of the improvement in data quality and the more granular estimation approach.** It is not possible to draw any conclusions on underlying change in the costs of applicants.

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<sup>95</sup> Better Regulation tool #59 (One-In-One-Out calculator) Tariffs in EUR/hour. Eurostat Structure of earnings survey, Labour Force Survey data for Non-Wage Labour Costs. Calculations assume 8-hour working day.

<sup>96</sup> The Horizon 2020 estimate should be treated as a rough figure illustrating the order of magnitude of the total costs of proposals. See also discussion in, [Final Evaluation of Horizon 2020 \(2024\)](#), Annex 4, page 51.

Figure 14: Comparison of estimates of total costs of applicants (Horizon Europe and Horizon 2020)



Source: Internal analysis, Horizon Europe estimate based on survey to beneficiaries and applicants conducted May-June 2023 and CORDA data (6.1.2025). Horizon 2020 estimate: Horizon 2020 final evaluation (COM(2024) 49 final).

#### 4.1.2.3 Applicants use of support for proposal preparation

Well over half of **Horizon Europe** applicants received support to prepare their proposals (possibly also with project implementation and dissemination) from a range of sources:

- **51%** (3688 respondents) indicated they received help from a **dedicated department** in their organisation.
- **29%** (2141) indicated that they had **not received any support**
- **19%** (1397) received support from a **National Contact Point (NCP)**; and
- **17%** (1252) commissioned support from a **consultancy firm/expert** (inside or outside the consortium).

**Across the programme, different patterns in the uptake of support emerge:** Comparatively high shares of applicants for **Pillar 3 (46%)**, in particular for the **EIC Accelerator (67%)**, and to some extent also for Pillar 2 Cluster 1 (28%; Pillar 2 average: 24%) made use of **consultancies**. Pillar 2 Cluster 3 stands out, in that a comparatively high share of respondents (**46%**; Pillar 2: average 29%) **did not use any sources of support** to prepare their application, presumably due to the sensitivity of the safety-related information in the applications<sup>97</sup>. Those applying for

<sup>97</sup> The remaining responses support this as only 31% of Cluster 3 respondents received application help from an internal department (Pillar 2: 38%, HE 50.5%), and a very low share (13%; Pillar 2: 24%, HE: 17%) used external consultancies.

**Innovation Actions** most frequently use external consultancies, with a range of shares between **24% and 36%**.<sup>98</sup>

**There is considerable overlap between the users of consultancy services and those of NCPs. Above a quarter (27%)** of all responding Horizon Europe applicants, who used consultancies or were consultancies themselves, also made use of the help offered by NCPs. Reversely, **26%** of NCPs-using applicants also employed/included consultancy services. In both cases the share is 8 or more percentage points higher than for Horizon Europe applicants in general. **The use of application support and the success of the application are correlated** for users of National Contact Points, as well as consultancies. However, the evaluation did not isolate the effect of receiving support (e.g. from consultancies) on the likelihood of success and the link is presumably driven by factors that influence both sides (e.g. financial resources).

**The overwhelming majority (74% to 80%)<sup>99</sup> of Horizon Europe proposals reaching the quality threshold had been written without the involvement of external consultancies.** 27% of quality proposals and 25% of proposals below the quality threshold were written with the help of consultancies. Also in these cases, a causal link may not exist.

The evaluation collected evidence on **fees paid to consultancies that assisted with proposal preparation**. The fees can be understood as a partial monetisation of application costs. **Successful applicants** reported on average a higher median **consultancy fee (EUR 10 000)** than **unsuccessful applicants (EUR 6 500)**.<sup>100</sup> The difference could be driven by success premium charged in case of the proposal is funded. 50 respondents to open questions shed light on the practices of hiring external consultancies and paying success fees. Some respondents stated that they paid a flat fee upfront and their agreement foresaw that a second fee would be paid if the proposal was successful. Information on the additional fee ranged from **3% to 7% of the project budget** and for fixed fees between **EUR 2 000 to EUR 5 000**.

The **median values of the consultancy fee<sup>101</sup> for proposals** prepared with the support of an external consultancy were **EUR 7 500** for consortia, **EUR 2 000** for **mono-beneficiaries** and **EUR 12 000** for **EIC Accelerator** proposals.

#### 4.2 Time-to targets (TTG, TTI, TTS, TTP)

In addition to the time-to-grant target (TTG), which represents the maximum allowable time for the evaluation and grant award process together, further targets set out expectations for the **proposal evaluation phase** (TTI / time-to-inform), the **grant agreement preparation phase** (TTS / time-to-sign) and the **time-to-pay (TTP)** is expressed as the **time to pre-finance** (target: 30 days)<sup>102</sup>. Horizon Europe has so far achieved an acceptable average time for **TTI of 130 days**

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<sup>98</sup> Estimation in Resilient Europe study, Annex 1.3.3, p.63 CORDA data matched with survey evidence on median costs reported for three applicant groups: consortia, mono-beneficiary, and EIC Accelerator.

<sup>99</sup> Evaluation study on Resilient Europe, Annex 1.3.3p.58. (targeted survey responses, matched with CORDA).

<sup>100</sup> Result also holds for the mean.

<sup>101</sup> Reported by 658 survey respondents to the question, “What was the total amount that your organisation paid to the consultancy firm/expert for the above services in project application/proposal writing?”

<sup>102</sup> Payments are disbursed to beneficiaries in several instalments: pre-financing, interim payment(s), and final payment, with pre-financing paid within 30 days of the agreement’s entry into force, and interim and final payments made within 90 days of the respective report submissions.



(target: 153 days, H2020: 112 days) and an average **TTS** of **95 days** (slightly above the target of 92 days; H2020: 76 days). As with Horizon 2020, this suggests that the grant agreement preparation phase remains the more challenging period of the two phases of the time-to-grant period. The achieved average **TTP** for prefinancing is 11 days, with 88% payments made on time, against a target of 30 days<sup>103</sup>. This highlights a certain level of efficiency in providing beneficiaries with the necessary cash flow at project start.

Table 10: Achieved average Time-to-Inform, Time-to-Sign, Time-to-Grant and Time-to-Pay

|   | HE TTI             | HE TTS  | HE TTG               | HE TTP                   |
|---|--------------------|---------|----------------------|--------------------------|
| Target<br>[average days]                | 153 days           | 92 days | 245days              | 30 days<br>(prefinanced) |
| Horizon Europe                          | 130 <sup>104</sup> | 95      | 240 (77%)            | 11 (88%)                 |
| Pillar I (excl. ERC)                    | 147                | 70      | 239 (72%)            |                          |
| Pillar I ERC                            |                    |         | (See table<br>below) |                          |
| Pillar I MSCA                           | 149                | 68      | 239 (71%)            |                          |
| Pillar II                               | 108                | 125     | 244 (87%)            |                          |
| Pillar III (excl. EIC)                  | 148                | 86      | 240 (77%)            |                          |
| Pillar III (EIC) -see explanation below | 141                | 93      | 238 (67%)            |                          |
| Widening and ERA                        | 128                | 90      | 230 (88%)            |                          |

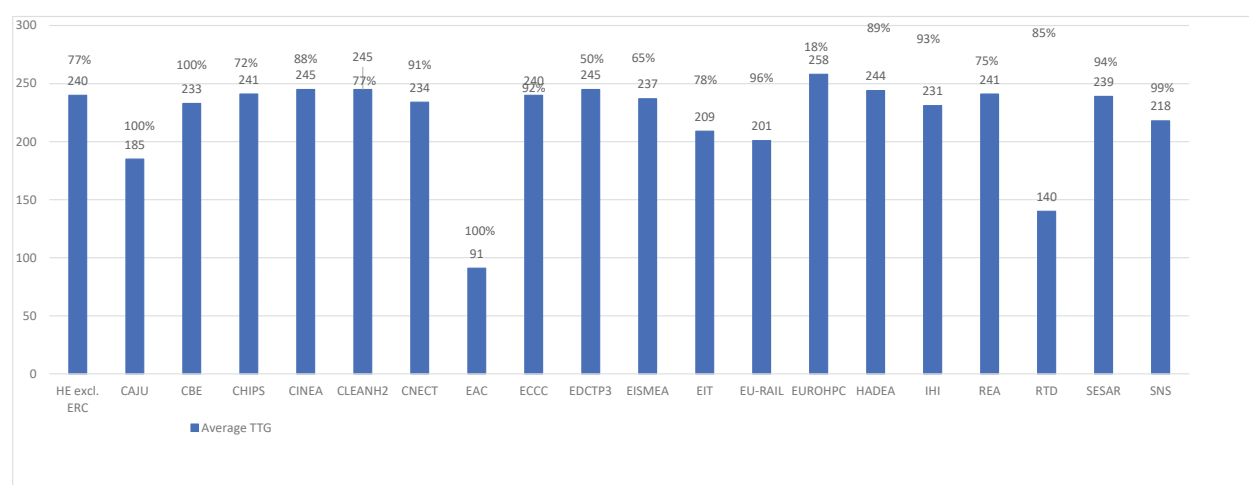
Sources: TTG, TTI, TTS, TTP Operational reporting, Time-to-Grant dashboard, 06.01.2025

The Horizon Europe monitoring system does not collect information on actual times-to-grant of grants the **EIT KICs** award under cascade funding to beneficiaries. The timing is only measured for the initial grants made to the KICs, which are processed by the EU Public Sector. The 17 KIC grants achieved the following averages: TTI of 69 days, TTS of 128 days and overall TTG of 197 days (82%). The achieved times-to-grant of cascading calls launched under the EIT KICs are not reported in the central database (CORDA). TTG values reported by EIT KICs can be found in the respective annexes 21 to 28.

<sup>103</sup> At the time of writing, the Time to Pay indicator based on the payments on target 90 days is not available in part due to ongoing transition between ABAC and SUMMA.

<sup>104</sup> Excluding ERC

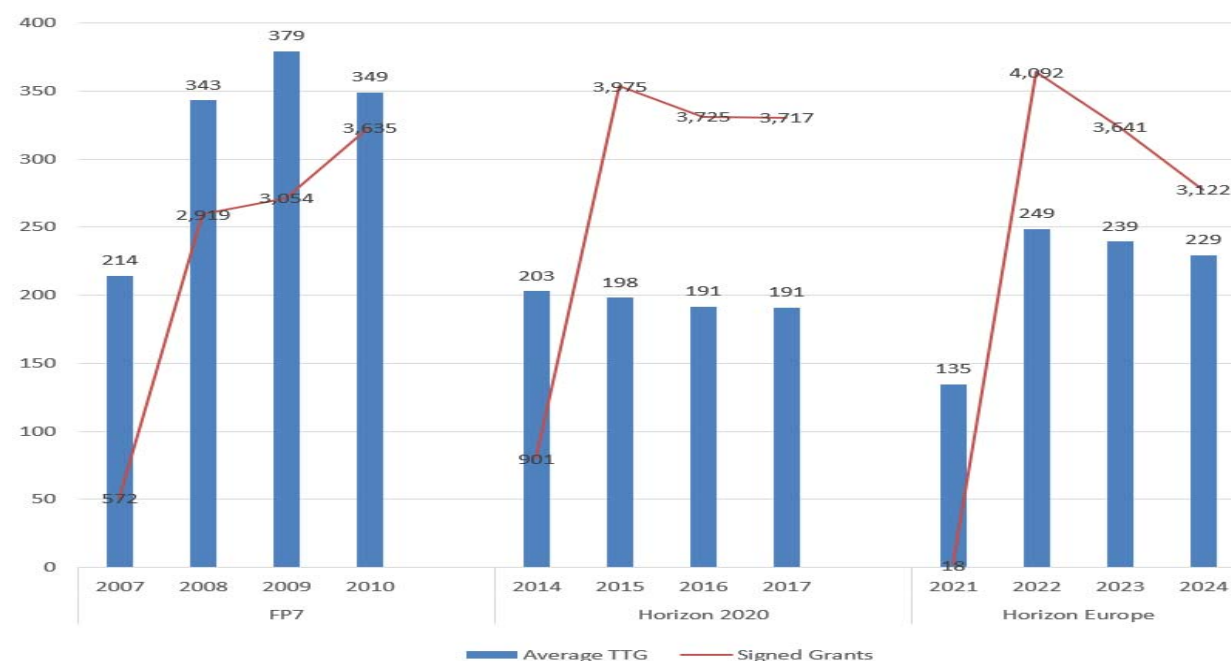
Figure 15: Horizon Europe average Time-to-Grant by organisational entity



Source: Operational reporting, Time-to-Grant dashboard, ERC excluded; as of 1 December 2024.

It must be kept in mind that the average periods reported above rise and fall throughout implementation. This is particularly true in the first few years where fluctuations tend to be higher. (see table below) The more limited the total number of grants the stronger the response to delays of any specific call. Values also capture set up or adaptation costs that will later average out once the adaptation phase has ended. The current time-to averages may therefore still provide limited information on performance trends of Horizon Europe as a whole.

Figure 16: Comparison of Horizon Europe, Horizon 2020, FP7 - Time-to-Grant of first 4 years



Source: Monitoring dashboard data of FP7, Horizon 2020 and Horizon Europe. Average TTG values (blue bars) and number of signed R&I support grants of FPs pooled, ERC excluded as of 2 January 2025

The **European Research Council** is exempt<sup>105</sup> from the eight-month time limit for finalising evaluations and grant decisions (TTG) as its evaluation process focuses on excellence and requires more time to ensure a rigorous peer-review process.<sup>106</sup> Instead, separate annual TTG targets, tailored to each ERC funding instrument, are annually defined in the ERC Work Programme. These thresholds account for the complexity and stages of evaluation specific to each instrument. The ERC reports its compliance with these thresholds in its Annual Activity Report (AAR).

Table 11: Average Time to Grant European Research Council by instrument for 2022-23<sup>107</sup>

| Instrument                | 2022<br>(completion rate <sup>108</sup> 100%) |         | 2023<br>(completion rate < 100%) |         |
|---------------------------|---|---------|----------------------------------|---------|
|                           | Targets                                       | Results | Targets                          | Results |
| Starting Grants (StG)     | 450   | 387.8   | 424                              | 356.9   |
| Consolidator Grants (CoG) | 441   | 404.4   | 429                              | 312.4   |
| Advanced Grants (AdG)     | 460   | 411.2   | N/A                              | N/A     |
| Synergy Grants (SyG)      | 503   | 468.5   | 511                              | 391.9   |
| Proof of Concept (PoC)    | 220   | 195     | 220                              | (1) 157 |

The evaluation looked into **international benchmarks** for administrative time performance measures, relevant to the context of processing proposals of funding programs for innovation funding, in particular for the EIC Accelerator, however, found that a comparison was difficult, due to the unique characteristics of the programme parts.

#### *Qualitative feedback from Horizon Europe applicants on time-to targets*

The targeted survey of Horizon Europe beneficiaries finds that beneficiaries are overall satisfied with the time-to targets of the programme. Concerning TTI, 68% of all Horizon Europe respondents indicated to be satisfied to a (very) large with the timeliness of the funding decisions. Lowest satisfaction is observed for EIC Accelerator and EIE, although satisfaction rates for both programmes are still at 58% and applicants are thus still overall positive.

<sup>105</sup> Article 31(3) of the Horizon Europe Regulation (EU) 2021/695.

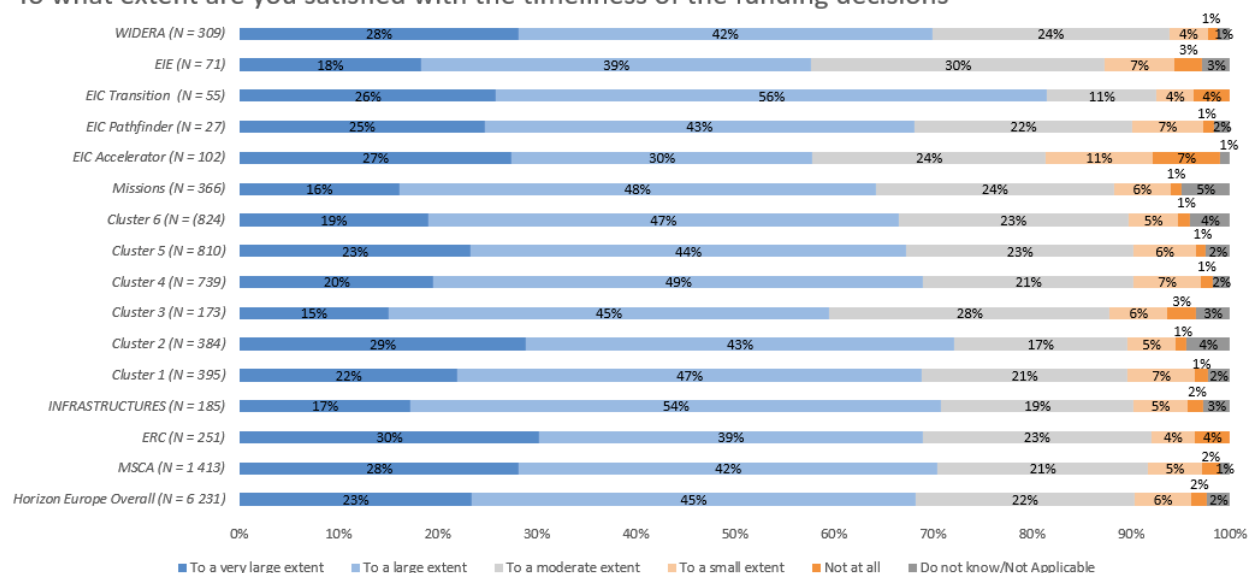
<sup>106</sup> Commission Decision approving the Annual Work Programme 2024 of the European Research Council Executive Agency. C(2024) 4524 final, Brussels, 3 July 2024. ANNEX.

<sup>107</sup> European Research Council Executive Agency. Annual Activity Report 2023

<sup>108</sup> Completion rate refers to the processing of the call evaluation.

Figure 17: Horizon Europe applicant satisfaction of the proposal evaluation phase

To what extent are you satisfied with the timeliness of the funding decisions

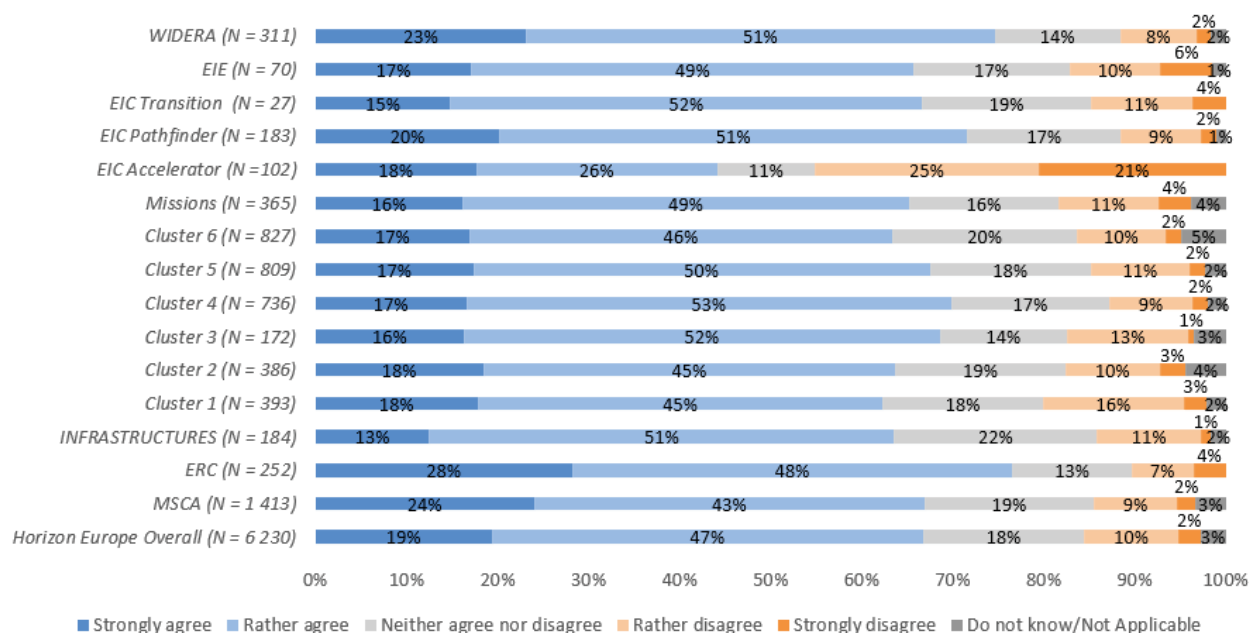


Source: Targeted survey of Horizon Europe beneficiaries and applicants.

Horizon Europe beneficiaries are also positive about the TTS of the programme, with 67% agreeing that the time the process takes up to the signature of the grant agreement is adequate. For the EIC Accelerator programme however opinions are divided, with 44% agreeing and 45% disagreeing that the time the process takes up to the signature of the grant agreement is adequate. For all other programmes parts beneficiaries overall indicate to be satisfied.

Figure 18: Horizon Europe applicant satisfaction of the grant agreement preparation phase

Would you agree or disagree that the time the process takes up to the signature of the grant agreement is adequate



Source: Targeted survey of Horizon Europe beneficiaries and applicants.

Seven respondents to the survey provided open-ended feedback on the evaluation and grant award process. These responses came from across Pillars I and II beneficiaries and were rather critical and contained suggestions for improvement. One Cluster 4 beneficiary suggests reducing time between convention of the evaluation panels (late January) and communication of the decision (middle of March). The same applicant mentions that, given that his proposal was submitted in November and the start date of the grant was October of the following year, the TTG is too long, as “*the context and even the technologies can change a lot in such a timeframe*”. An ERC COG and Cluster 6 beneficiary mention that the grant agreement preparation phase is actually too short and troublesome. An MSCA PF beneficiary on the other hand mentions the grant agreement preparation phase to be too long, causing a 2-month delay in employment.

### 4.3 Value-for-money of Horizon Europe

This annex provides additional information on the calculation of the benefit cost ratio. Table 12 below shows the costs and benefit values used in the calculation. The evaluation calculates a benefit cost ratio over **25 years (2021-2045)**. This period was chosen to allow time for the emergence of wider benefits of R&I investments.

**Total Benefits:** The expected GDP impact is used as the closest available proxy of the overall welfare benefits for EU society. The calculation uses two macro-economic forecasts from mid-2023 (Nemesis) and mid-2024 (Rhomolo). As model inputs, the Nemesis model used monitoring data on grants signed before mid- 2023, whereas the Rhomolo model took account of grants signed up to mid-2024. In both case, forecasts of the cumulative GDP impact of Horizon Europe over 25



years, from 2021 until 2045, were used. The estimates are adjusted for inflation, to be comparable with the expenditure of the respective years.

**Total Costs:** The EU Public Sector's committed operational and administrative expenditure, as well as the estimated cost of all (successful and unsuccessful) Horizon Europe applicants up to now (see Annex 4.1.2) are included in the total costs. Two sets of expenditure values have been used to match the respective data cut-off points of the two model. The same estimate of the total cost of applicants is added in both case. While the estimate of applicant costs is more robust than before (e.g in the Horizon 2020 final evaluation) it is still much more uncertain than the public expenditure data.

Table 12: Benefit Cost Ratio calculation

| <b>Costs of Horizon Europe</b>   |  |                           |
|--|--|---------------------------|
| <b>(1) Operational Expenditure of EU Public Sector</b><br>For Nemesis, expenditure committed by <b>06/2023</b> :   | EUR 35.346 billion                                     |                           |
|  | For Rhomolo, expenditure committed by <b>06/2024</b> : |                           |
| <b>(2) Administrative Expenditure of EU Public Sector</b><br>For Nemesis, expenditure committed by <b>06/2023</b> :  | EUR 2.383 billion                                      |                           |
|  | For Rhomolo, expenditure committed by <b>06/2024</b> : |                           |
| <b>(3) Cost of applicants</b><br>(Note: estimated on basis of survey responses and monitoring data, see Annex 4.1.2.1 for detail; used both for Nemesis and Rhomolo) | low<br>EUR 1.92 billion                                | high<br>EUR 2.82 billion  |
| <b>Total Cost</b>  | low  | high                      |
| Compared with Nemesis output (assessment mid- <b>2023</b> ):   | <b>EUR 39.645 billion</b>                              | <b>EUR 40.545 billion</b> |
| Compared with Rhomolo output (assessment mid- <b>2024</b> ):   | <b>EUR 50.995 billion</b>                              | <b>EUR 51.895 billion</b> |

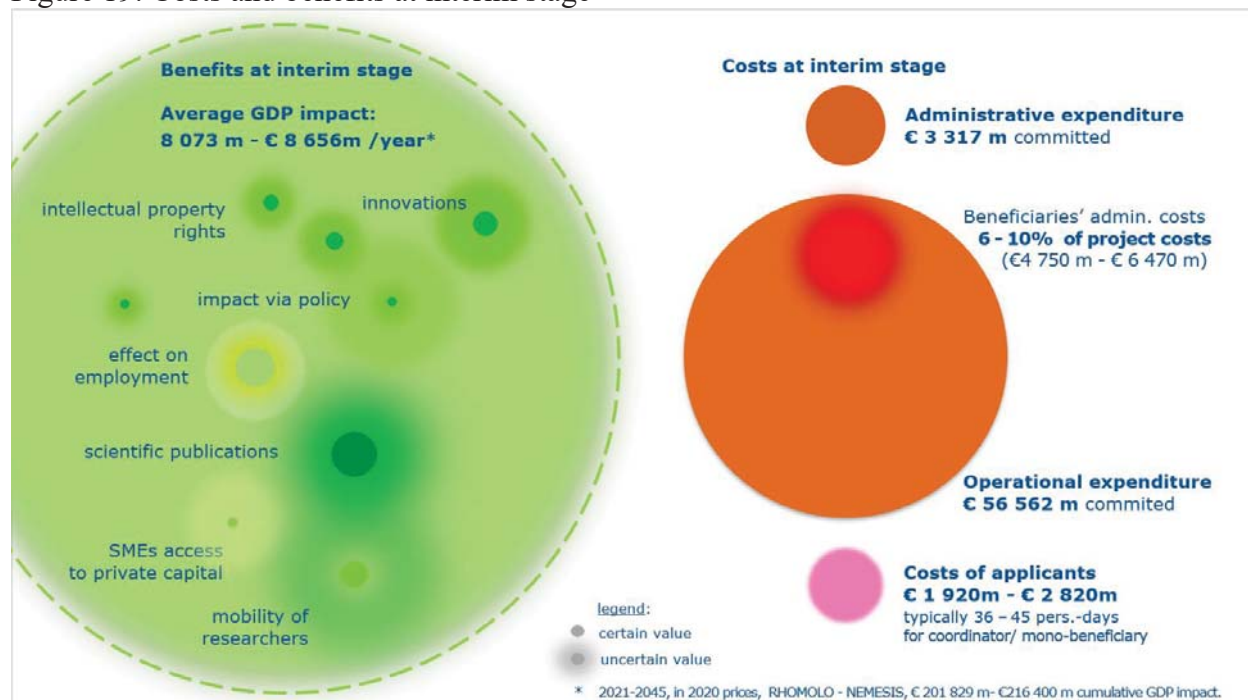
| <b>Benefits of Horizon Europe</b>   |                                      |
|---|--------------------------------------|
| <b>(1) Total Benefits of Horizon Europe (25 years)</b><br>(Note: GDP impact 2021-2045, as proxy to welfare impact; Price base = year of assessment) |                                      |
| Nemesis (assessment in mid- <b>2023</b> ):  | NEMESIS - <b>EUR 248.823 billion</b> |
| Rhomolo (assessment in mid- <b>2024</b> ):  | RHOMOLO - <b>EUR 239.163 billion</b> |

| <b>Benefit Cost Ratio (BCR) – 25 years (2021-2045)</b> | <b>low</b> | <b>high</b> |
|--|------------|-------------|
| NEMESIS  | <b>6.1</b> | <b>6.3</b>  |
| RHOMOLO  | <b>4.6</b> | <b>4.7</b>  |

The results suggest that the **benefit cost ratio (BCR) of Horizon Europe is 5 to 6, for a 25-year period**, which means that **one euro of costs to society associated with the programme**

(programme costs and costs to applicants) is expected to bring about at least five euros of benefits for EU citizens (measured through GDP impact) in the period up to 2045.

Figure 19: Costs and benefits at interim stage



#### 4.4 Performance of simplification measures of Horizon Europe

##### 4.4.1 Partnerships' administrative costs and rationalisation of partnership landscape

To shed light on the relative order of magnitude of the **costs of institutionalised partnerships**, particularly their administrative costs (or running costs), the evaluation brought together operational data of Joint Undertakings (JUs), Article 185 partnerships and EIT-Knowledge and Innovation Communities (KICs) covering the last 10 years (2014-2023). This data, while available for close to all partnerships,<sup>109</sup> is typically not aggregated as the level of total cost bringing together all sources that contribute to operational and administrative costs. It is also typically presented for shorter time spans (most commonly annually), during which costs are strongly affected by the setting up or winding down of the partnership. **The 10-year period was chosen to have data on a sufficiently long time span, which averages out particularities of single years and even single partnerships, with the aim to introduce some transparency into the cost structure of partnership types.**

Due to the time period, the data thus covers **activities under three framework programmes**. It stems from 20 JUs/Art.185 partnerships, which have been aggregated into 10 thematic groups and from 8 KICs. The JUs/Art185 partnerships have been thematically grouped together with their predecessors of previous framework programme in the following way: Innovative Health Initiative + Innovative Medicine, Clean Aviation + Clean Sky 2, Circular Bio-based Europe + Bio-based Industries, Clean Hydrogen + Fuel Cells and Hydrogen, Global Health (EDCTP3) + EDCTP2,

<sup>109</sup> EuroHPC has been excluded as costs could not be verified.

EMPIR + EPM, Chips + Key Digital Technologies + ECSEL, Smart Networks and Services, Europe's Rail + Shift2Rail Single European Sky ATM + SESAR. KIC Health, KIC Manufacturing, KIC Raw Materials, KIC Digital, KIC Urban Mobility, KIC Climate, KIC Food, KIC InnoEnergy.

### *Operational costs of institutionalised partnerships*

Table 13: Operational costs of institutionalised partnerships

| Type of partnership | <b>Total Operational Costs</b> [EUR /year]<br>including EU contributions; validated IKOP; financial contributions to operational activities by JU partners; eligible project costs funded by non-JU members to project activities; and contributions from Member States and international organisations to project activities. (Data: 2014-2023) |  |   |
|---------------------|--|--|---|
|                     | average annual cost (pooled) <sup>110</sup>  | median of average annual cost <sup>111</sup> | range of average annual cost (lowest -highest) <sup>112</sup> |
| JUs/Art.185         | 223 300 000  | 190 300 000                                  | 28 300 000 - 651 300 000                                      |
| EIT KICs            | 66 900 000   | 65 300 000                                   | 34 300 000 - 83 600 000                                       |

**The operational cost of JUs/Art185 partnerships varies substantially**, by an order of magnitude between the partnerships, with a range of **EUR 28.3 million to EUR 651.3 million annually on average**. For EIT KICs, the **average operational costs are lower** than those of the JUs and also lie closer together, from **on average EUR 34.3 million to EUR 83.6 million annually**. The lower operational cost may be explained by the type of activities of the EIT KICs and the differing objectives as compared to JUs activities and their objectives, with a substantial share of its activities reflected in administrative expenditure, as illustrated below.

### *Administrative costs/ running costs of institutionalised partnerships*

Table 14: Administrative costs (Running Costs) of institutionalised partnerships

| Type of partnership | <b>Total Administrative Costs (Running Costs)</b> [EUR /year]<br>including contributions from the EU and from sources other than the EU. (Data: 2014-2023) <sup>113</sup> |                                |   |
|---------------------|---|--------------------------------|---|
|                     | average annual cost (pooled)  | median of average annual costs | range of average annual costs (lowest -highest) |
| JUs/Art.185         | 5 200 000   | 4 300 000                      | 1 300 000 - 9 700 000                           |
| EIT KICs            | 8 800 000   | 7 900 000                      | 5 700 000 – 11 700 000                          |

<sup>110</sup> Average annual cost pools the 88 (JU/Art185) and 52 (KICs) verifiable annual operational cost values of partnerships, from 10 JU/Art 185 thematic groups and 8 EIT KICs respectively; rounded to nearest 100 000.

<sup>111</sup> The median of the averages (i.e. median of the average annual costs calculated by partnerships/partnership-groups taking into account their years of activity). Rounded to nearest 100 000.

<sup>112</sup> The lowest and highest average annual costs across partnerships/partnership-groups (taking into account their years of activity). Rounded to nearest 100 000.

<sup>113</sup> The pooled average annual cost, median of the averages, and lowest to highest average annual costs in this table are calculated in parallel to those of the operational cost table. Values rounded to nearest 100 000.

The data suggests that, over the 10-year period **JUs spent on average 3.7%** (median 2.9%) **of their overall expenditure on running costs**. Pooling all administrative cost data of all JUs for the period of 2014-2023, the annual administrative cost (averaged over all years for which data was reported<sup>114</sup>) was around **EUR 5.2 million**, with the annual average cost of individual partnerships ranging between EUR 1.3 million and EUR 9.7 million.

**KICs have higher running costs** due to key features of their operational set up. KICs are pan-European networks with **numerous offices across Europe ('co-location centres')**. While the related overheads are spent on what could be considered an operational activity and underpin the KICs potential, they also render KICs more administrative cost intensive.

The shares of the KICs' running costs as a share of its overall costs (running costs + operational costs) are higher throughout, with no substantial differences observed between waves. **KICs spent around 12%** (average 11.9%, mode 12.2%) **of their overall costs on running costs**. Pooling the administrative cost data of all KICs for the period of 2014-2023, the **annual administrative cost** (averaged over all years for which data was reported<sup>115</sup>) was around **EUR 8.8 million**, with the annual average cost of individual KICs ranging between EUR 5.7 million and EUR 11.7 million.

Table 15: Administrative costs (Running Costs) compared to overall expenditure

| Type of partnership | <b>Total Administrative Costs (Running Cost) as share of overall cost (Total Running Cost + Total Operational Cost) (Data: 2014-2023)</b> <sup>116</sup> |   |  |  |
|---------------------|--|---|--|--|
|                     | pooled administrative cost share   | average of partnerships' administrative cost shares | median of partnerships' administrative cost shares | range (lowest - highest) of administrative cost shares |
| JUs/Art.185         | 2.3%   | 3.7%  | 2.9%   | 0.6% <sup>117</sup> - 9.6%                             |
| EIT KICs            | 11.6%  | 11.9%   | 12.2%  | 9.6% – 14.4% <sup>118</sup>                            |

Due to their operational arrangement, **running costs of KICs and JUs cannot be directly compared**. A comparison of the running costs of the **KICs' headquarters (HQ)** with other partnerships would have been informative, however, KICs are free to take different approaches towards cost reporting and the data required for such a split is not available for all KICs.

Cost data available for 5 KICs for the years 2021 and 2022 (Table 16) illustrates the **effect of the network of offices (CLC) across Europe on administrative costs** and suggests that considering running costs of headquarters on their own lowers the **administrative cost share by about 30% percent on average**. Applied to the costs recorded for the period 2014-2023, this lowers the **average KIC's administrative cost share to around 8%** (instead of around 12%).

<sup>114</sup> Number of partnership-years for which data was reported at least for administrative or for operational costs.

<sup>115</sup> Number of partnership-years for which data was reported at least for administrative or for operational costs.

<sup>116</sup> Based on same data as tables 1 and 2.

<sup>117</sup> Minimum value stems from Smart Networks and Services (SNS) Partnership, which has just been set up. Administrative expenditure data on its predecessor 5G PPP is not available as the partnership was centrally managed by the European Commission. Excluding SNS results in a range of 0.8%-9.6%, median of 3.0% and average of 4.0%.

<sup>118</sup> Split by waves, ranges are: 1<sup>st</sup> wave: 12.3% (both), 2<sup>nd</sup> wave: 9.6%-12.2%, 3<sup>rd</sup> wave: 11.2%, 4<sup>th</sup> wave: 12.1%-14.4%.

Table 16: Administrative costs (5 KICs; 2021 & 2022) comparing to HQ and HQ+ CLC offices

| European partnership | HE Average for HQ+CLC | HE Average for HQ only |
|----------------------|-----------------------|------------------------|
| KIC Manufacturing    | 7,57%                 | 4,92%                  |
| KIC Raw Materials    | 6,64%                 | 3,74%                  |
| KIC Digital          | 8,58%                 | 4,95%                  |
| KIC Urban Mobility   | 12,58%                | 9,26%                  |
| KIC Food             | 9,01%                 | 7,58%                  |

\*for the other three KICs (EIT Climate-KIC, EIT InnoEnergy, EIT Health), administrative costs for co-location centres cannot be identified.

### *Benchmark and targets*

**There are no directly applicable performance benchmarks, targets, or explicit expressions of expectations around the partnerships' share of total administrative cost.** Some indirect benchmarks do exist, such as the 5% administrative expenditure benchmark of the framework programme as a whole. Art 185 bodies/JUs on average clearly stay below 5 %, which is only exceeded by 2 of the 10 partnership-groups individually during the period of 2013-2024, as well as by the EIT KICs' average (and individual) annual running costs. However, the 5% administrative expenditure level was never meant to apply to partnerships (individually or as a whole) and is not directly suited for a programme-level evaluation.

A second type of target for Horizon Europe's institutional partnerships is set out in legislation<sup>119</sup> in the form of the **maximum amounts the partnerships are allowed to spend on "administrative costs"** out of their **EU contributions**. In practice, running costs are also paid from contributions other than the EU. Within the legal limits<sup>120</sup> it is a strategic decision of each partnership to what extent to use EU contributions for operational or administrative expenditure, therefore the actually achieved share itself is not informative about a partnership's operational efficiency.

These legal, currently applicable **administrative expenditure ceilings for EU contributions** can be expressed as a percentage of the total EU contribution (see table below), even though these percentages are subject to change. For instance, the additional UK financial contributions from 2024 onwards will indirectly reduce the administrative cost share expressed in this way.

**The evaluation observes that the currently imposed administrative expenditure ceilings on the different JUs are surprisingly varied, when expressed as a percentage and range from 1.5% to 7.5%.**

If these limits had been set using a standardised approach, the **relative magnitude of the partnerships' administrative cost ceilings** could be interpreted as an indirect expectation on achievable *relative* administrative efficiency. However, the evaluation could not establish that this

<sup>119</sup> Single Basic Act [Council Regulation 2021/2085](#) establishing the Joint Undertakings under Horizon Europe, Art.10.1 (*The Union financial contribution to the joint undertakings, (...), shall cover administrative and operational costs up to the maximum amounts specified in Part Two, provided that that amount is at least matched by the contribution of members other than the Union or their constituent or affiliated entities.*); Chips JU establishing Decision 2021/2084; as well as in legislation for EPM Art. 185 Partnership and EIT KICs..

<sup>120</sup> Council Regulation 2021/2085 Art.28 4(a) Partners are expected to match the administrative costs funded through EU contributions. For some partnerships derogations are in place. Calculated ceilings exclude UK financial contributions, which will reduce the administrative cost share.



was the case. Some values seem to reflect **previous ceilings of Horizon 2020 predecessors**<sup>121</sup>, others are likely the **indirect effect of an increase in EU contributions**<sup>122</sup>, others again may be the **outcome of negotiations** or and indirect expression of the expected ability of the partnership to obtain funds from sources other than from EU contributions.

Table 17: Administrative expenditure ceilings of Joint Undertakings /Art 185 partnerships

|                           | <b>Administrative expenditure ceiling of Horizon Europe JUs</b> expressed as share of the JU's total EU contribution |
|---------------------------|--|
| EPM (EURAMET)             | 5% <sup>123</sup>  |
| Chips JU                  | 1.5% <sup>124</sup>  |
| Smart Networks & Services | 2.1%   |
| Clean Aviation            | 2.3%   |
| Circular Bio-Based Europe | 2.4%   |
| IHI                       | 2.5%   |
| Clean Hydrogen            | 3.0%   |
| Europe's Rail             | 4.0%   |
| SESAR                     | 5.0%   |
| GH-EDCTP 3                | 7.5%   |

In its Guidelines to KICs for their 2022 Business Plans, EIT has set out structured administrative cost ceilings that reflect each KIC's maturity in a given year given its launch date (wave). As of 2023, the **applicable administrative cost ceiling** of the **KIC** in scope of the evaluation is **currently 12%**.

Table 18: Administrative expenditure ceilings of EIT KICs (waves 1 to 4)

| <b>EIT KIC</b>                      | <b>Administrative expenditure ceiling of Horizon Europe EIT KICs</b> expressed as share of the KIC's total EU contribution |  |
|-------------------------------------|--|--|
| First wave KICS                     | EIT Digital, EIT InnoEnergy, EIT Climate-KIC   | 18% in 2016<br>15 % in 2017<br><b>12 % in 2018 and onwards</b> |
| Second wave KICS (launched in 2014) | EIT Health, EIT Raw Materials  | 18% in 2017<br>15% in 2018<br><b>12% in 2019 and onwards</b>   |
| Third wave KICS (launched in 2016)  | EIT Food   | 18% in 2019<br>15% in 2020<br><b>12% in 2021 and onwards</b>   |
| Fourth wave KICS (launched in 2018) | EIT Manufacturing<br>EIT Urban Mobility  | 18% in 2021<br>15% in 2022<br><b>12% in 2023 and onwards</b>   |

<sup>121</sup> For instance, under Horizon 2020, EDCTP2 (Art.185) was allowed up to 6% of the Union's financial contribution to cover administrative costs. (Decision No 556/2014/EU, Art 2.3.) EDCTP3 now has a ceiling of a similar size.

<sup>122</sup> E.g. Chips JU

<sup>123</sup> Running costs (paid for personnel, opening of calls, continuous monitoring of projects, etc) are not to be funded through EU contributions (Member State funding only), as per establishing Decision 2021/2084.

<sup>124</sup> Regulation 2021/2085, Art. 128 modified the EU contributions (EUR 4 175 million, of which EUR 2725 from Horizon Europe) and administrative cost ceiling (EUR 62 287 000).

#### *4.4.2 Lump sum funding – removal of beneficiaries' financial reporting requirements*

**Lump sum funding**, as a simplification measure, has the aim to **reduce a grant beneficiary's reporting costs**, and thus administrative costs, and to lower the elevated rates of **financial errors of R&I funding**. It also has the wider objective to shift the focus back onto a project's performance and content, away from financial controls, for grant beneficiaries and public administration alike.

Beneficiaries of standard (actual cost) grants have to prepare and submit detailed financial reports (in addition to other reporting requirements) each reporting period to unlock grant payments. In contrast, **lump sum grant beneficiaries are paid a previously agreed fixed sum (lump sum) for each delivered work package. Financial reporting requirements, which make up a substantial share of a beneficiary's reporting burden<sup>125</sup>, fall away.**

In addition to the grants' beneficiaries, lump sum funding also has **effects on other stakeholder groups** involved in the programme:

- **Public administrators** no longer have to check financial reporting (simplification benefit, administrative cost of EU public sector) but have to adapt grant management practices to the shift of focus on the performance of the content (adjustment costs).
- **Applicants** for lump sum grants have to prepare and submit an additional budget table (application costs), **evaluators of the proposals** have to assess the additional budget table (administrative cost of EU public sector).

Under Horizon Europe, the use of lump sum grants has been gradually expanded, building on the previous, generally positive assessment of lump sum funding for R&I projects under Horizon 2020.<sup>126,127</sup>

#### *The use of lump sum grant in Horizon Europe*

**As of 1 January 2025, a total of 1 582 lump sum grants have been signed under and Horizon Europe, for a total value of EUR 3.03 billion.** These belong to two types of grants.

**706 ERC Proof of Concept** lump sum grants have been signed over a total value of **EUR 106 million**, each with one reporting period and a grant value of EUR 150 000. PoC grants have exclusively used lump sum funding since its pilot in 2018 under Horizon 2020. Although simplification benefits from PoC lump sum grants are strictly speaking not additional under Horizon Europe, they are included in the quantitative estimate of the total simplification effect from lump sum funding in this evaluation.

**876 lump sum grants (excl. ERC PoCs)** have been signed, with an average of 9 consortium members, a median of 2 reporting periods (1 to 4 periods), and over a total value of **EUR 2.93 billion**.

A detailed description of the state-of-play of lump sum funding, covering the entire lifecycle of grants as of early 2024 can be found in the new assessment on lump sum published in September 2024.<sup>128</sup> Implementation data suggest that the signed lump sum grants closely match the

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<sup>125</sup> The evaluation has no evidence on what share of the beneficiary's overall reporting cost is spent on financial reporting. One assumption is 25%, as a plausible value. This value is yet to be tested and not used in the assessment.

<sup>126</sup> [Assessment of the Lump Sum Pilot \(2018-2020\)](#), October 2021.

<sup>127</sup> See also Section 4.2.3 and Annex 4 of the [Final Evaluation of Horizon 2020](#) (2023)

<sup>128</sup> [Assessment of lump sum funding in Horizon 2020 and Horizon Europe](#), September 2024

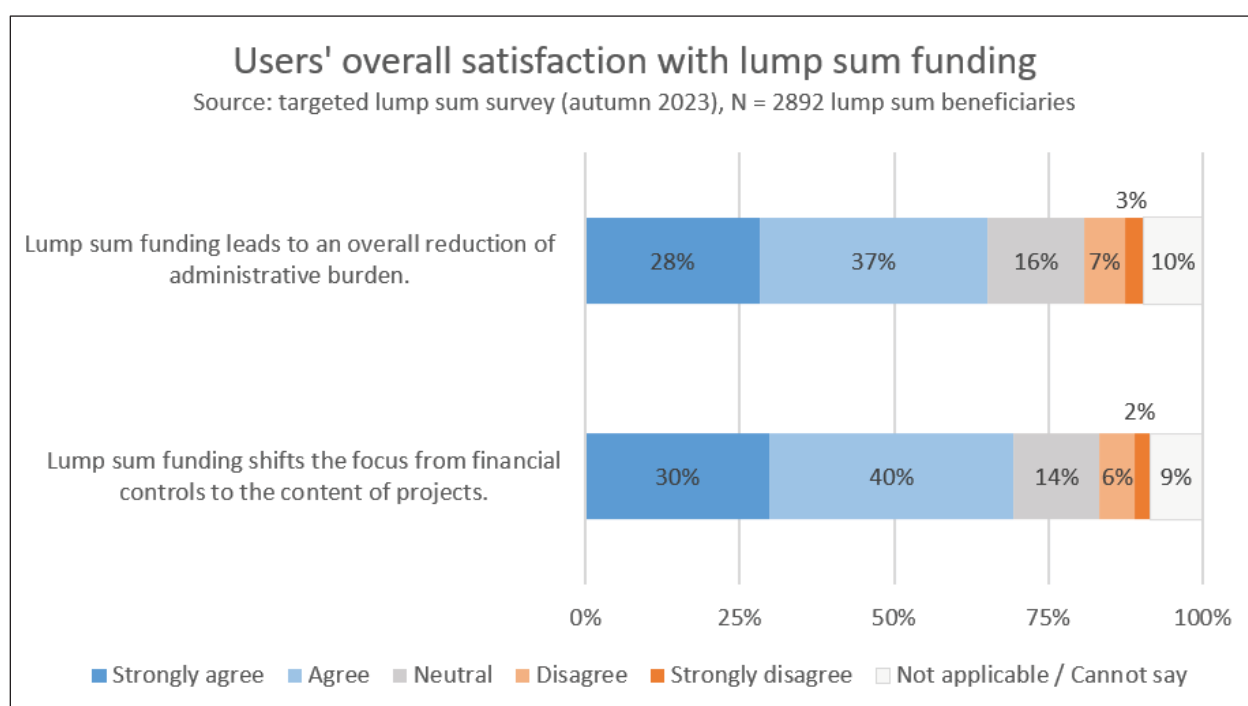
characteristics of Horizon Europe grants in general in terms of applying organisations,<sup>129</sup> average funding per participant,<sup>130</sup> participation rates of SMEs and newcomers<sup>131</sup>, as well as the average number of amendments to grant agreements.<sup>132</sup>

## Benefits of lump sum funding

### *Qualitative feedback on benefits*

The 2024 internal assessment finds that lump sum funding continues to be **generally popular** with its users (see Figure 20), who, across all programme parts, **perceived an overall reduction in administrative burden** (65%, 1880 respondents), and an **improved focus on project content** (70%, 2024). Lump sum funding is not seen as interfering with the proper functioning of R&I projects.<sup>133</sup>

Figure 20: Overall satisfaction with lump sum funding



Source: Based on 2892 responses of lump sum applicants/beneficiaries to targeted lump sum survey (Sept.-Oct. 2023).

When considering consortium and project size, **lump sum grants are particularly welcomed by beneficiaries of grants of up to EUR 10 million, and those with a consortium size up to 20 participants.**<sup>134</sup> At the same time, survey results did not suggest that larger grants are unsuited for lump sum funding or were associated with a substantially higher risk.<sup>135</sup> Of the 116 responding

<sup>129</sup> Ibid. figure 3, page 12.

<sup>130</sup> Ibid. figure 8, page 18.

<sup>131</sup> Ibid. figure 10, page 20.

<sup>132</sup> Ibid. figure 12, page 23.

<sup>133</sup> Ibid., page 5.

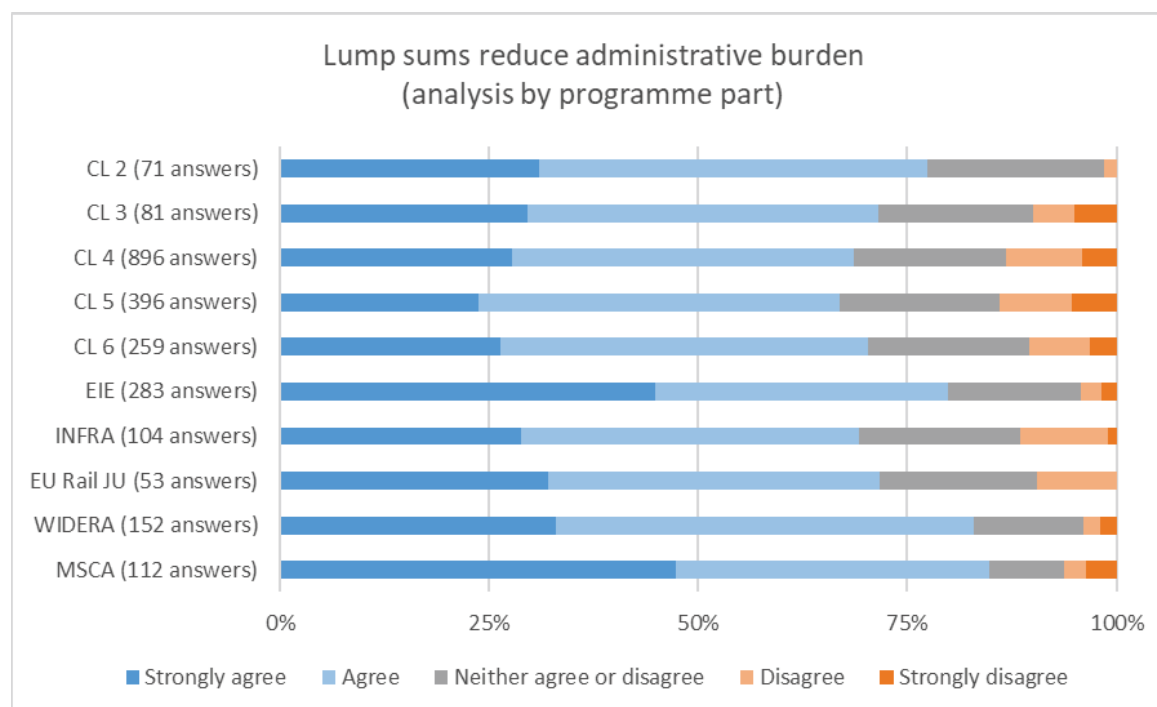
<sup>134</sup> Ibid., page 6.

<sup>135</sup> Ibid., page 6.

beneficiaries of lump sum grants **above EUR 10 million**, 70% (81) agreed or strongly agreed that lump sum grants reduced administrative burden.<sup>136</sup>

Survey responses provided no indication that that lump sum funding could be unsuitable for any given **area of R&I**. Beneficiaries' responses on administrative burden savings from lump sum grants are relatively homogenous across programme part, with **MSCA** and **EIE** respondents showing particularly strong support. (Figure 21).

Figure 21: Lump sum participants' perception of administrative burden reduction



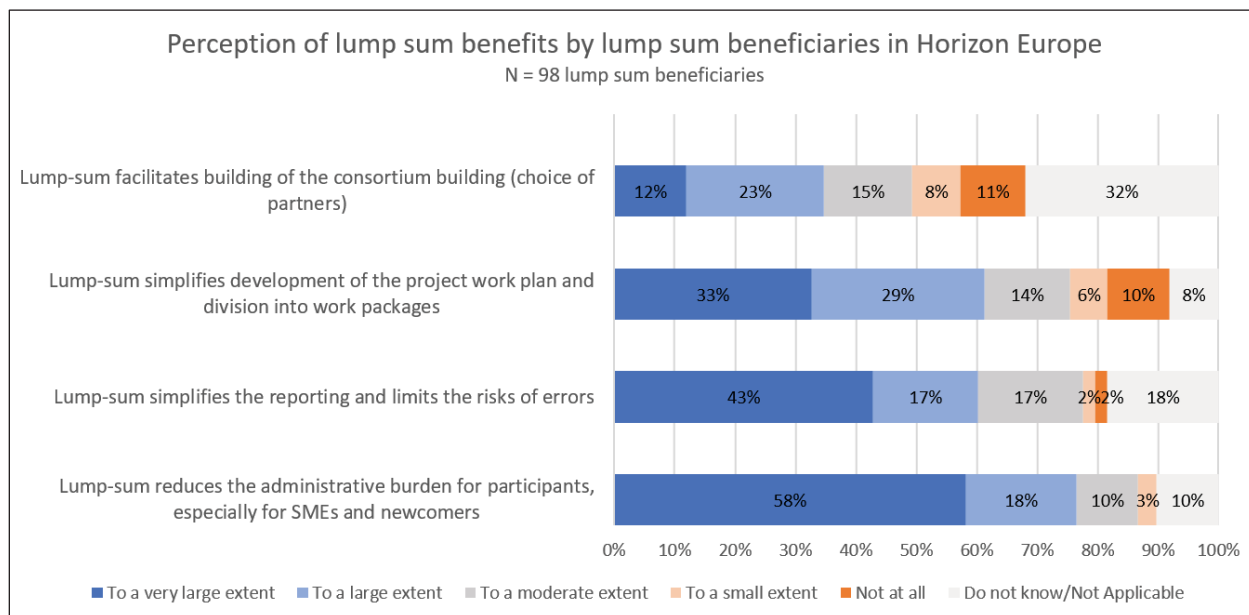
Source: 2407 responses (excl. 10% "Cannot Say") to survey of lump sum applicants / beneficiaries (Sept.-Oct. 2023)

The evaluation's targeted survey of Horizon Europe beneficiaries and applicants collected similar evidence, also in summer 2023 and from lump sum beneficiaries. The survey unsurprisingly confirms the general support for the rationale of lump sum grants, with high levels of strong agreement on the main benefits of lump sum funding.

Out of 98 responding lump sum beneficiaries, 74 (76%) agree to a large or very large extent with the statement that lump sum funding reduces the **administrative burden** for participants and 60% agree at least to a large extent that lump sum grants **simplify reporting and limits the risk of errors**. While 62% agree (at least to a large extent) that lump sum funding **simplifies the project work plan and the division into work packages**, beneficiaries' views are much less uniform, with a larger share who disagree (16% 'not at all' and 'to a small extent'). Views on the extent to which lump sum funding helps with consortium building are even more divergent, with only 35% perceiving the benefit at least to a large extent but 18% not in support (Figure 22).

<sup>136</sup> Ibid. figure 25, page 37.

Figure 22: Perception of lump sum benefits by lump sum beneficiaries in Horizon Europe



Source: Survey to Horizon Europe beneficiaries and applicants (May-June 2023), 98 responses from lump sum beneficiaries.

The **private sector** in particular supports the main rationale for benefits from a reduced administrative burden thanks to lump sum grants (see Annex 5, Figure 51) - 65% of responding companies and business associations agree that the use of lump sum reduces the burden on beneficiaries. At the same, the support for existing accounting practices of participants in the context of lump sum funding is judged as comparatively weaker. (see Annex 5, Figure 65)

#### *Quantitative assessment of lump sum benefits*

Evidence from applicants and beneficiaries makes it possible, for the first time, to shed light on the **magnitude of simplification benefits from lump sum funding from removing financial reporting requirements**. It suggests that the **typical financial reporting cost saving of lump sum grant beneficiaries amounts to between 6 to 8 person-days per reporting period and consortium member**.

The underlying **evidence** stems from **2 short surveys** (both ran 30 July and 9 September 2024), which **focused on lump sum funding and financial reporting costs**. They invited beneficiaries of lump sum grants under Horizon 2020 and Horizon Europe, as well as beneficiaries of actual cost grants across Horizon Europe, who, by July 2024, had already reported at least once on their projects.<sup>137</sup> The overall response rates were 21% (300 lump sum grant respondents) and 19% (1533 actual cost grants respondents), respectively.

(1) A question on time savings in the first targeted survey asked 1451 beneficiaries of lump sum grants of Horizon 2020 and Horizon Europe (excl. ERC PoC). In response, **210 lump sum grant beneficiaries with past experience of actual cost grants** reported a median financial reporting

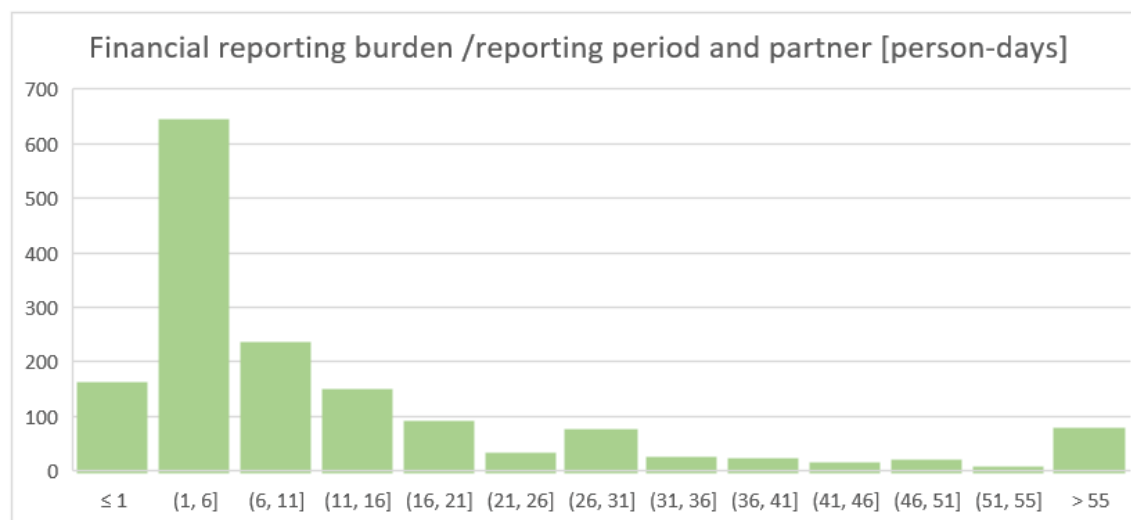
<sup>137</sup> The survey addressed to lump sum grant beneficiaries reused the list of beneficiaries of the related earlier targeted survey on lump sum funding from September - October 2023 as a starting point.



cost saving of **8 person-days per reporting period and consortium member**. 20 lump sum beneficiaries indicated they had experienced no savings,<sup>138</sup> the remainder reported savings between 0.1 and 150 person-days per consortium member per reporting period.<sup>139</sup>

(2) To test and validate the lump sum beneficiaries' responses, a parallel, second survey approached 8082 beneficiaries (project financial signatories) of actual cost grants across Horizon Europe (excluding ERC), who had at least once submitted periodic reporting by July 2024. A survey question asked **actual cost grant beneficiaries** to estimate their **incurred financial reporting costs under Horizon Europe**. As financial reporting falls away under lump sum funding, the responses provide an **indirect estimate of savings that could have been achieved** had these grants been lump sum grants. The **1 529 responses** suggest a slightly lower, but fairly similar, median financial reporting cost of **6 person-days per reporting period and consortium member**, with a mode of 5 person-days and a range of 0.1 to 116 person-days, after excluding outliers.<sup>140</sup> When limiting the survey sample further to respondents, whose answers to more specific sub-questions on reporting burden are internally consistent with their indicated total financial reporting cost, the second survey also returns a median benefit of 8 person-days per reporting period and consortium member. However, this approach does not account for the fact that some of the more specific questions may have been more difficult to answer<sup>141</sup> and it would exclude 35% of the respondents, which is why it has not been chosen as the central approach.

Figure 23: Distribution of responses - Actual Cost Grant beneficiaries: financial reporting costs



Source: 1529 responses, Horizon Europe actual cost grant beneficiaries, who had reported; X-axis shows the financial reporting costs in the unit of “person-days per reporting period and partner”. Y-axis shows the number of responses received that fell into each specific bracket of person-days. E.g. “(1, 6]” = from above 1 to including 6 person-days.

<sup>138</sup> 1 response reported a related cost increase from coordination efforts to ensure performance across the consortium.

<sup>139</sup> Excluding 4 outliers (2%, 300 - 870). It is assumed that respondents may have reported the total cost saving for all consortium members together, all reporting periods together, or even both. Reduces median by 0.5 person-days.

<sup>140</sup> Excluding 23 outliers (1.5%; > 2 SD). Same reasoning as for lump sum survey.

<sup>141</sup> Many answers to the subsequent, more specific questions either repeat the response to the general one or return extreme values. This suggests that respondents may have had difficulties to answer the more specific questions, but it does not automatically devalue their response to the more general question on the overall financial reporting costs.

The evaluation used implementation data on lump sum grants (excluding ERC PoCs) signed until 1 January 2025, specifically the respective participants and reporting periods, to calculate the grants' time savings. This assessment suggests an estimated **median saving of financial reporting costs per grant for lump sum grant beneficiaries of between 96 and 128 person-days**. This median saving stems from a grant of just under EUR 2 million, a consortium of 8 participants and 2 reporting periods, which is reassuringly close to the median consortium size of 9 participants and median of 2 reporting periods that characterise non-POC lump sum grants signed so far. However, lump sum funding is going to be progressively rolled out in the remaining years of Horizon Europe and the composition of lump sum grants will change. As the share of lump sum grants with higher grant values is expected to rise, the typical time saving a (Type II) lump sum grant can achieve over its project lifetime is expected to increase in parallel. The final evaluation of Horizon Europe will be in a position to test this expectation.

At interim evaluation stage, only considering grants that have been signed up to 1 January 2025, **additional lump sum funding under Horizon Europe (excl. ERC PoCs) is estimated to have secured time savings of between around 129 000 and 172 000 person-days (financial reporting burden reduction) over their entire project lifetime.**

**ERC Proof of Concept (Type I.) lump sum grant** beneficiaries were not among the respondents of the surveys and some characteristics of PoC grants (mono-beneficiary, 1 reporting period, uniform grant value of EUR 150 000) substantially differ from those of the typical lump sum grants introduced under Horizon Europe. However, PoC grants do not differ substantially from the other lump sum grants in terms of the grant value per reporting period and participant (i.e. mono-beneficiary or consortium member).<sup>142</sup> Under the **assumption** that the estimated time cost savings per reporting period and consortium member are therefore equally applicable to PoC grants, the estimated typical lump sum benefit of a PoC grant is **6 to 8 person days**. PoC lump sum grants signed so far under Horizon Europe are thus estimated to realise savings of between **4200 to 5600 person-days** in reporting burden reduction over the entire project lifecycle. For the interim evaluation of Horizon Europe, ERC Proof of Concept lump sum grants do not lead to additional simplification savings, as **ERC PoCs have been exclusively using lump sum funding since the last years of Horizon 2020 and are thus part of the evaluation's baseline**. However, PoCs have not been evaluated before and are assessed to complete the overall effect of lump sum funding as a simplification measure.

### *Monetisation*

To **monetise the time savings**, the evaluation applies a **R&I sector-specific cost of labour** derived from a *median personnel cost* value from past grant applications. The sectoral value better **reflects the opportunity cost of the lump sum project team's time** than the EU average tariff associated with administrative costs (Better Regulation tool #59) otherwise used in the evaluation for monetisation. The median personnel cost, also in use in the 'lump sum dashboard', currently stands at EUR 5 500 per person-month and is updated at intervals. It includes wage costs, non-wage costs and overheads, reflects the geography of Europe's R&I sector and the mix of professional profiles of team members in R&I projects. The evaluation assumes that the

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<sup>142</sup> The median normalised grant value by consortium member and reporting period of non POC lump sum grants signed until 1 Jan 2025 is around EUR135 000.

composition of profiles is adequate for financial reporting activities that aggregate information from across the entire project team.

Applying the sector-specific labour cost, the time saving of a **typical lump sum grant** (excl. POCs) corresponds to a simplification benefit of around **EUR 33 200 and EUR 44 200 per grant**, equivalent to around **1.4% to 1.8% of the grant value, or 12% to 27% of the beneficiaries' administrative costs**.<sup>143</sup> Time savings for each of the ERC PC lump sum grants is estimated to correspond to around EUR 1 800 to EUR 2 500, 1.2% to 1.6% of the grant value, or 12% to 20% of the beneficiaries' median administrative cost.<sup>144</sup>

The **lump sum grants (non-PoC and ERC PoC) signed so far** are therefore estimated to experience savings of between around **133 000 and 177 300 person-days** in reporting burden reduction over their entire project lifetime. This is equivalent to EUR 40.8 million – EUR 54.4 million, or **1.3% - 1.8%** of the total grant value. **The time saving thus is expected to eliminate 12% to 26% of the beneficiaries' administrative costs.**

In addition to the time saved on financial reporting, some lump sum grant beneficiaries also **no longer have to submit a certificate on the financial statements (CFS)** for EU contributions above EUR 430 000.

Survey responses (634 responses)<sup>145</sup> suggest that a **CFS typically costs EUR 4 500**.<sup>146</sup> Lump sum grants are estimated to so far have saved beneficiaries around **EUR 9.0 million**<sup>147</sup> on CFS in total in addition, equivalent to around **0.3% of the total grant value**.

**In summary, at interim evaluation stage, only considering the lump sum grants (including ERC PoCs) that have been signed to date, lump sum funding is estimated to already have secured a reporting burden reduction for beneficiaries of between EUR 49.8 million and EUR 63.4 million over their projects' lifetime, combining administrative cost savings and avoided CFS certificates. This is equivalent to between 1.6% and 2.1% of the grant value, or a saving of 14% to 30% of the beneficiaries' administrative costs.**

The use of lump sum funding under Horizon Europe is scheduled to broaden and pick up speed in the coming years. The future potential under Horizon Europe is discussed in annex 4.5.1.

#### *Adjustment process of lump sum grant beneficiaries to realise benefits*

Survey respondents shed light on the adjustment process of lump sum grant beneficiaries to the removal of financial reporting requirements. The overwhelming majority<sup>148</sup> of the lump sum grant respondents had discontinued at least “some of” the tasks that were no longer required, with over

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<sup>143</sup> based on evidence presented in as per Annex 4.1.1, using the range of 6%-10% of project costs.

<sup>144</sup> of EUR 9000 to EUR 15 000 (project cost and grant value are identical for PoCs).

<sup>145</sup> Excluding zero values and cannot say.

<sup>146</sup> (mode) EUR 5000. 20% (125) of respondents within range of EUR 4500 to EUR 5000.

<sup>147</sup> Based on 2001; (01.01.2025) consortium members involved in the lump sum grants above EUR 430 000 signed so far, who would have had to submit a CFS certificates under the actual cost grant. Around 22% of the lump sum grants signed to far had CFS requirements.

<sup>148</sup> Based on 267 of 300 (89%) of lump sum grant respondents to the corresponding survey question, of which 11% (33) discontinued all of the financial management and financial reporting tasks that are no longer required under lump sum grants, 37% (111) continue “some of” the tasks, and 32 % (97) “most of” the tasks. 20% (59) still carry out “all of” the financial management and financial reporting tasks that are no longer required. Some respondents explained the underlying reasons for retaining the tasks.

half abandoning “most” or “all of” the non-required tasks. About a tenth indicated they had not changed their practices at all, which is also reflected in zero savings reported above. Underlying reasons to continue (some of) the practices include internal requirements or the fact that an organisation’s practice is dominated by their more numerous actual cost grants.

From the perspective of the assessment, the removal of financial reporting requirements already constitutes a reduction of beneficiaries’ administrative costs (imposed by the framework programme) as such, independent of the actual changes to beneficiaries’ financial management practices. This is because beneficiaries are free to organise themselves in the most efficient way, even if they choose not to (fully) adapt their financial practices, particularly in the short-term.

The **framework programme should ensure that no conflicting requirements are imposed on lump sum beneficiaries by other areas of the framework programme**, in order not to hinder the simplification effects to take effect. One respondent to the survey’s open question pointed out that their **membership obligations as part of a Joint Undertaking** prevented them from realising the savings from a removal of financial reporting obligations. Their organisation still had to provide audits of the total costs (EC grant and IKOP) as assurances and checks to the Financial Signatory, who were still required to sign off their financial submission on the Funding & Tenders portal. Based on the information provided in the comment, the evaluation was not able to firmly establish whether the obligations could reasonably have been expected to disappear under lump sums funding. However, the comment highlights the **risk of clashing requirements** in some areas of the framework programme, which can stand in the way of an effective implementation on lump sum funding and will need to be monitored and addressed.

The uncertainty around the internal adjustment processes to the changed requirements has the potential to delay adaptation. **Beneficiaries may therefore benefit from an exchange of experience on how to tweak internal practices to maximise savings.**

### **Costs and side-effects of lump sum funding**

The simplification measure introduces additional requirements for i) **applicants** and ii) **proposal evaluators**. It also changes the iii) processes of the programme’s **implementing bodies** (EU public sector administration). In addition to the topic of application costs, stakeholder feedback, has raised concerns about iv) **potential side-effects on the financial risk of beneficiaries and on amendments to grant agreements**.

i) *Lump sum applicants' costs - quantitative and qualitative evidence*

All Horizon Europe applicants, regardless of funding model, must base their proposals on detailed budget estimates, which they are also required to keep on file.<sup>149</sup> **Applicants to lump sum calls have to submit an additional budget table together with their proposal, as supporting information on their proposed lump sum.** This requirement does not exist for ERC PoC lump sum grants, where the sum is predetermined. Aggregating the budget information for the table is not an additional task but included in the baseline cost of applicants. What changes for lump sum proposals is that **applicants must enter and submit their figures into a specific template, currently in the form of an excel spreadsheet, instead of keeping the information at hand in a format of their choice under actual cost grants.** Any additional time spent by applicants on reformatting the information is categorised as an administrative cost of the simplification measure, while any experienced nuisance in handling the document counted as ‘hassle cost’.<sup>150</sup> The size of any additional cost to applicants strongly depends on the user friendliness and lay-out of the template itself. The cost may be reduced over time through adaptation and optimisation of the IT tools and template.

**Survey responses of lump sum beneficiaries and unsuccessful applicants<sup>151</sup> (excluding ERC PoC) suggest that, at least so far, for most applicants the additional application costs do not raise any concerns or are even negligible.** The median response indicates that lump sum beneficiaries spend 16 to 25 person-days preparing their proposal<sup>152</sup>, less than applicants to other types of grants where the median is 26 to 35 person-days. The difference is particularly visible among European Innovation Ecosystems (EIE) participants, which is in line with the findings from the targeted survey on the beneficiaries' perception of a net-administrative burden reduction induced by lump-sum (see figure in section 4.4.2), which is the highest for EIE beneficiaries (and MSCA), and slightly lower among Pillar 2 participants. However, respondent numbers were low, due to the early date of the survey. As there is no reason why lump sum funding should lower the cost of applicants, **the observed below-average costs are likely driven by the composition of the still low number of lump sum grants that had been signed at the time of the survey.**

Table 19: Targeted survey of interim evaluation - Lump sum beneficiaries application costs.

|                        | Lump sum beneficiaries |                      | Non-lump sum beneficiaries |                      | All lump sum beneficiaries | Horizon Europe minus lump-sum beneficiaries |
|------------------------|------------------------|----------------------|----------------------------|----------------------|----------------------------|---|
|                        | Cluster 2              | EIE                  | Cluster 2                  | EIE                  |                            |   |
| <b>Median</b>          | 16 to 25 person-days   | 16 to 25 person-days | 16 to 25 person-days       | 26 to 35 person-days | 16 to 25 person-days       | 26 to 35 person-days                        |
| <b>Mode</b>            | 6 to 15 person-days    | 6 to 15 person-days  | 16 to 25 person-days       | 16 to 25 person-days | 6 to 15 person-days        | 16 to 25 person-days                        |
| <b>Total responses</b> | 31                     | 202                  | 1161                       | 13                   | 233                        | 17103                                       |

Source: internal analysis, based on 17 336 responses to a targeted survey of Horizon Europe applicants (May-July 2023).

Qualitative evidence collected from lump sum beneficiaries confirm that the cost increase for applicants has been limited. The survey to Horizon Europe beneficiaries and applicants shows that

<sup>149</sup> [Get prepared - Online Manual - Funding Tenders Opportunities](#), “The budgeted costs should be based on a detailed and accurate estimation of your estimated project costs (...) Keep your estimates on file - you may be required to produce them later on.”

<sup>150</sup> European Commission, Better Regulation Toolbox (2021), Tool 56. Sec 2. Categories of Costs and Benefits. While they exist, hassle costs are typically not quantified in evaluations to keep the assessment proportionate.

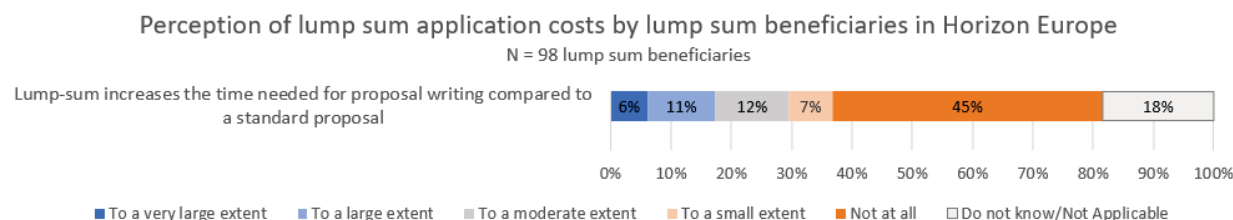
<sup>151</sup> The evaluation's comprehensive targeted survey, summer 2023.

<sup>152</sup> ‘In your estimation, how many person-days did your organisation spend in preparing your Horizon Europe proposal?’



the largest group of respondents among lump sum beneficiaries (45%) do not perceive at all an increase in the time needed for proposal writing (compared to a standard proposal), as shown in the figure below. In comparison, 17% agree to a large or very large extent that lump sum funding does increase the proposal writing time.

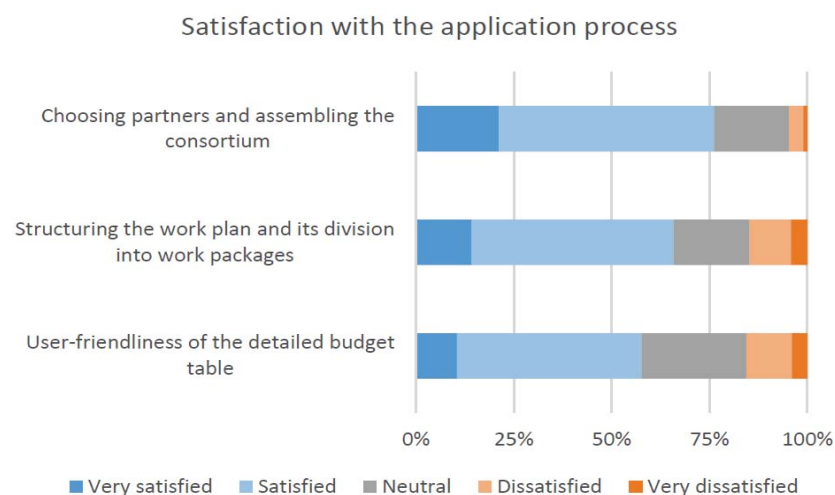
Figure 24: Perception of lump sum application costs by lump sum beneficiaries in Horizon Europe



Source: Survey to Horizon Europe beneficiaries and applicants, conducted in May-June 2023, 98 responses from lump sum beneficiaries

The targeted survey to lump sum beneficiaries (Sept. -Oct. 2023) also shows satisfaction from the participants in regard to the application process, with more than half satisfied or very satisfied with respectively the choice of partners and assembling of the consortium (76%), the structure of the work plan and division into work package (65%), and the user-friendliness of the detailed budget table (57%). In the follow-up survey of 2024, 3 respondents report in their open answers that while lump-sum grants require a slight extra effort at the proposal stage (compared to a standard proposal), it is compensated by the reduced administrative burden overall, or corresponds to the budget planning effort in standard grants.

Figure 25: Satisfaction of lump sum beneficiaries and applicants with the application process



Source: Targeted survey to lump sum beneficiaries and applications, conducted in September-October 2023, 2982 answers from lump sum beneficiaries and applicants<sup>153</sup>.

<sup>153</sup> European Commission 2024. Assessment of Lump Sum Funding in Horizon 2020 and Horizon Europe.

In the **position papers** submitted as part of the open consultation on Horizon Europe mid-term evaluation, several stakeholders covered the topic of application costs of lump sum funding. At least 14 position papers (out of 216 position papers submitted) raised concerns of a **shifting workload from the project implementation stage to the proposal stage**, issued by a series of European (and one national) networks of research centres, four universities or universities associations, one RTO, one national research agency and one national research centre, and one large company.

While the currently available evidence on lump sum application costs provides no cause for concern and no indication of average additional costs borne by lump sum beneficiaries, costs may change in the future and should be monitored as a potential source of side-effects.

## *ii) EU Public Sector – Proposal evaluation costs*

**Evaluators** of proposals for lump sum grants have to assess an **additional detailed budget table**, on which the lump sum calculations are based and which is submitted with the proposal.

The evaluators are external professionals with scientific and technical expertise in the specific field of the call or call topic. The implementation of lump sum funding uses the **assumption that evaluators have acquired all necessary skills for the assessment of the additional lump sum budget in the context of their regular professional experience**. At the time of the interim evaluation, insufficient evidence is available to test this assumption,<sup>154</sup> which is relevant to ensure a fair and high-quality evaluation of lump sum proposals.

Evaluators draw on **specific guidance**, in particular on guidance on **benchmark itemised costs** (maintained on the basis of past R&I framework programme project data).<sup>155</sup>

Evaluators are remunerated for the additional task of assessing the budget table. The **additional compensated workload per evaluator of a lump sum grant proposal is equivalent to 2 ‘points’ of complexity** per lump sum grant.

In addition, **more experts are involved** in the evaluations of each lump sum proposal. Instructions foresee the involvement of **at least 3 experts per lump sum proposal**. In practice, the numbers vary, with some Executive Agencies involving **4 to 5 experts** per lump sum proposal, which may indicate an adjustment process during which services gather experience. The exact number of evaluators involved is decided by the implementing body on a case-by-case basis. **The evaluation could not establish the total number of additional evaluators involved in lump sum proposal evaluations under Horizon Europe**, relative to how many would have been involved if the

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<sup>154</sup> Based on the distribution of roles, e.g. in academic institutions, not all who are qualified in terms of their scientific and technical expertise may also have sufficient experience in putting together budgets for projects. The assumption, however, only requires that those experts, who are chosen as evaluators using the key words such as ‘project management’, ‘financial and budgetary analysis’, and ‘cost estimation analysis’, are sufficiently skilled to assess the lump sum budget information with the help of the specific guidance and benchmark data, such as the Horizon dashboard for lump sum evaluations.

<sup>155</sup> See detail on Horizon dashboard for lump sum evaluations in footnote above (monetisation of lump sum benefits). Benchmark level costs act only as guidance. Proposals with costs that exceed these levels can also be funded, where they are justified. Responses to the evaluation’s targeted survey open questions revealed a lack of awareness of this possibility.

proposals had been for actual cost grants. The total cost of evaluators is an additional administrative cost of the EU Public sector.

*iii) EU Public Sector – administrative costs of Horizon Europe Implementing Bodies*

The use of lump sum funding requires an adaptation of internal administrative processes in implementing bodies, such as Executive Agencies and Joint Undertakings. The changes alter Public Sector **administrative costs** and generate **adjustment costs** in the short run. **Financial reporting documents no longer have to be processed**, which generates cost savings from simplification. At the same time, a greater emphasis is placed on the content of the supported projects, **some workflows have to be adjusted, and staff have to become familiar with changes** to the implementation practices.

In autumn 2023, the management of six **European implementation bodies** (five Executive Agencies and one Joint Undertaking) were asked for (qualitative) **feedback on their experience with lump sum funding** so far.

Their feedback was collected at a relatively early stage when services still had **limited experience with the funding model** under Horizon Europe. This may explain, why **not many EU Services had yet formed clear views on the measure's net-effect on public resource**. In response to the statement, 'The cumulative effort [of the service] for managing lump sum projects, over the entire project lifecycle, is lower than for actual cost projects.', three services indicated they 'neither agreed nor disagreed', two services 'agreed' and one 'disagreed'.

**Overall, the feedback suggested that the pace of introduction was not seen as disruptive, lump sum funding was generally welcomed, and some concerns around implementation existed.** Four of the six EU services 'agreed' or 'strongly agreed' with the statement that 'lump sum funding was introduced at a pace that allowed their organisation and staff to adapt without disruption', while two gave a neutral response. Four EU services 'agreed' or 'strongly agreed' that the introduction of lump sum funding in Horizon Europe is welcomed by the service, while one service 'disagreed', and one gave a neutral response. Three of the six EU services were 'satisfied' with how lump sum funding is implemented, two were 'dissatisfied', with again one neutral response.

The EU Services also submitted **concrete suggestions** for the implementation of lump sum funding, which **centred on the adjustment phase**. These included, for instance, to further clarify guidance and templates, and to review the IT workflows and tools with the specificities of lump sum funding in mind.

The introduction of lump sum funding is accompanied by a **responsive organisational setup** that has the potential to **minimise adjustment costs** and **reduce implementation costs**. The suggestions on implementation were discussed in the context of the **lump sum practitioners' group**, where all Executive Agencies and Joint Undertakings are represented. In early 2024, as a follow-up, the internal lump sum guidance for EU staff and the external guidance for applicants and beneficiaries were updated to provide additional information on how to design and describe the work packages. In addition, the Excel file template for the lump sum budget table was updated to clarify instructions and improve its compatibility with the IT environment for the submission of proposals. The group accompanies the further introduction of lump sum funding and continues to act as a forum for the exchange on best practices and lessons learned from managing lump sum topics and grants, and to discuss potential improvements.

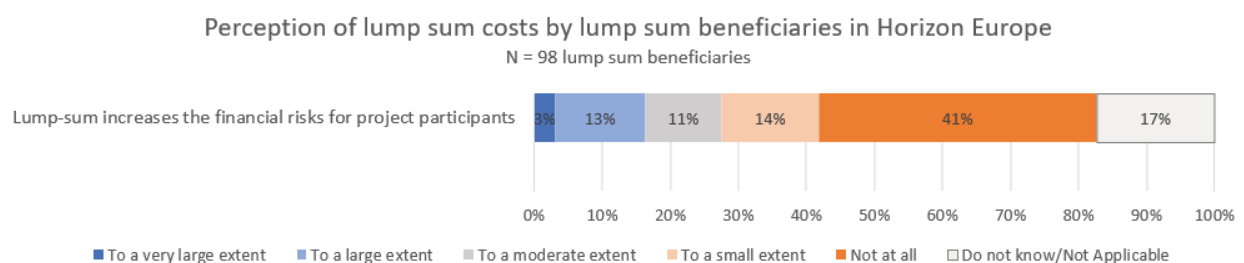
*iv) Stakeholder concerns on unintended side-effects of lump sum funding*

In addition to concerns around application costs, stakeholders also raised concerns on **higher financial risks and uncertainty** for lump sum beneficiaries compared to standard grants. Based on the open answers to the targeted survey to lump sum beneficiaries conducted in summer 2024, lump sum funding is perceived by five respondents (out of 301) as increasing the risk of incurring a reduction of budget due to partners' underperformance, or as creating costs to prevent such situation to happen. Position papers received in the context of the public consultation for the mid-term evaluation of Horizon Europe raise similar concerns: at least 8 large beneficiary organisations (including three (national) research centres or network of research centres, and five universities or networks of universities, and one large enterprise) are worried about the financial risk of lump sum funding in large consortia, where the liability is shared with many partners, and potential negative consequences on collaboration and mitigation costs. It should be noted that these concerns relate to the use of lump sum funding for large and complex (non-linear) projects, while the use of lump sum funding for small-scale projects, and for Coordination and support actions (CSA), is supported.

**Horizon Europe implementation data does not support these concerns.** The rate of grant reduction in closed lump sum grants so far<sup>156</sup> has stayed under 1%, irrespective of the budget size of the grant. This is an indication that beneficiaries' actual, realised risk of not completing a lump sum project remains low. Lump sum funding does not change the joint responsibility of consortia to deliver on the project milestones, and the pre-financing and payments are handled in the same way in lump sum and actual costs grants<sup>157</sup>.

In addition, the survey to Horizon Europe applicants and beneficiaries shows that among lump sum beneficiaries, 45% report that lump sum funding does not increase at all the financial risks for participants, compared to 16% who agree to a large or very large extent that it does. The targeted survey to lump sum beneficiaries (2023) find similar results, with a large majority of respondents agreeing that the schedule of payments is adequate for the cash flow, and that the financial risk does not increase in lump sum projects (see figures below).

Figure 26: Perception of lump sum financial risk by lump sum beneficiaries in Horizon Europe

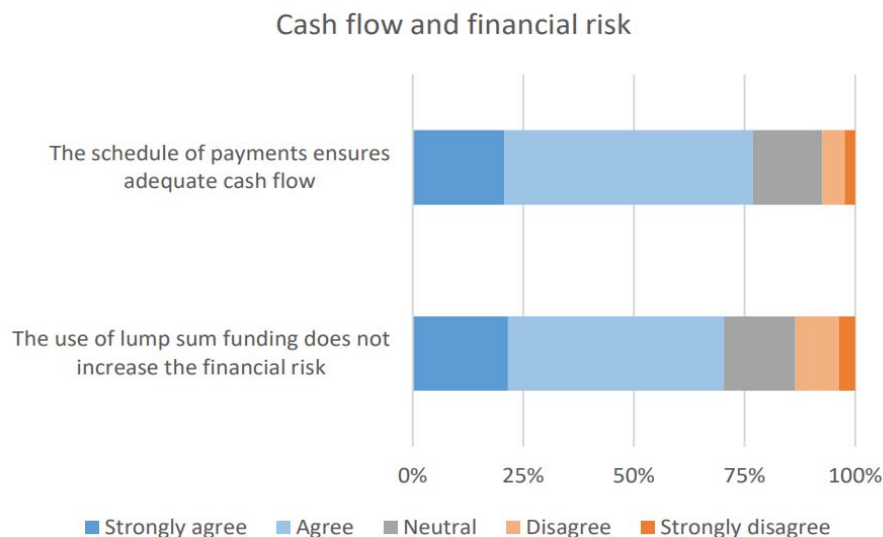


Source: Survey to Horizon Europe beneficiaries and applicants, conducted in May-June 2023, 98 responses from lump sum beneficiaries

<sup>156</sup> Commission internal assessment, based on implementation data (CORDA)

<sup>157</sup> European Commission 2024. Assessment of Lump Sum Funding in Horizon 2020 and Horizon Europe.

Figure 27: Opinion of lump sum beneficiaries on cash flow and financial risk



Source: Targeted survey to lump sum beneficiaries, conducted in September-October 2023, (cash flow n =1022; risk n= 1020 ; ‘cannot say’/‘not applicable’ excluded)answers from lump sum beneficiaries<sup>158</sup>

Another concern raised in position papers (and by one respondent of the targeted survey to lump sum beneficiaries) is that the **multiplication of work packages** in lump sum grants leads to artificial work plans with isolated responsibilities and heavy amendments. This was mentioned in the position papers of two networks of research centres and RTOs, one national research centre, one RTO, and two universities. However, the targeted survey to lump sum beneficiaries shows that the majority of lump sum beneficiaries (65%) are satisfied or very satisfied with the structure of the work plan and its division into work packages (see Figure 27 in the section above). No significant difference was observed between the two funding models in terms of the **number of amendments**. At the same time, controls have been effective and lead to some reductions at evaluation and payment stage, which is reassuring with regard to safeguarding public finances.

Finally, some beneficiaries of lump sum still need to comply with more traditional cost-based rules under their national financing and/or as participant to other Horizon projects. According to the answers to the targeted survey’s open question to lump sum beneficiaries (2024), **working under different funding schemes appears to create confusion and extra administrative burden** for some beneficiaries (2 respondents, out of 301), or at least to limit the benefits of lump sum grants for others (8 respondents out of 301). In one position paper (written by a network of research centres) and three open answers, beneficiaries suggest leaving the choice to applicants on whether to apply lump sums or not.

In view of these concerns, the costs and benefits of lump sum grants will continue to be assessed, including in the Horizon Europe final evaluation. **While lump sum funding is a key part of the simplification of the Framework Programme, it will not be generalised blindly, but be used when it is the most appropriate tool, based on thorough monitoring and assessment.**

<sup>158</sup> European Commission 2024. Assessment of Lump Sum Funding in Horizon 2020 and Horizon Europe. Page 32.



## *Monitoring of Horizon Europe*

Lump sum funding has an effect on the way some monitoring indicators of the framework programme can be collected. Please see Annex 2 point 15 for details.

### *4.4.3 Blind Evaluation of Proposals Pilot*

All two-stage calls in the Horizon Work Programme 2023-24 (with the exception of one call in Widening) participated in the pilot (16 calls) and all of its 2100 proposals were evaluated in a 'blind' fashion. For these calls, an additional '**admissibility criterion**' was introduced, stating that applicants submitting a proposal must **not disclose their organisation names, acronyms, logos nor names of personnel** in the technical description (part B) of their first-stage application template. The second-stage application was not part of the blind evaluation pilot and evaluated as usual.

For the blind evaluation to be effective, expert evaluators must not know the consortium structure nor the applicant(s) involved. **Applicants received additional guidance**, as part of the application template's part B, on how to anonymise the template, including practical examples.

Before the blind evaluation could be carried out by **evaluation experts**, all part B's of the submitted proposals had to be checked, not only for direct identification, but also indirect identification of the participants (e.g. through links to web pages or through references to their role and previous experience). This work was carried out by the **call coordinators** in Executive Agencies.

#### *Outcome of pilot*

The pilot's main aim was to test whether a **blind evaluation of proposals was feasible within the legal framework and the operational context of the R&I framework programme**, which was confirmed by the successful implementation of the two-stage calls. The pilot also collected **comprehensive feedback from internal and external stakeholders** involved and **monitored the distribution of the geographical coverage of participants and of the gender of project coordinators**.

The feedback collected through an online questionnaire from **applicants, evaluation experts and NCPs** was predominantly positive, particularly that from NCPs of widening and third countries. **Evaluators** signalled that the guidance they had been given was clear and that they experienced only an insignificant increase in workload as consequence of the measure.

**Call coordinators** raised concerns about the additional effort to perform 'admissibility checks' of the proposals, with feedback ranging from strong disapproval to moderate agreement. Comprehensive checks of whether an indirect identification was possible were particularly time consuming.

Looking at the **geographical coverage** of the proposals, it was observed that for all calls (blind and non-blind evaluations) the overall share of participants from widening countries was lower in the retained proposals than in the evaluated ones. While in non-blind evaluations the share between

submitted and retained proposals decreased by 9.4%<sup>159</sup> (from 19.1% to 17.3%), a smaller decrease was observed in the blind evaluation, by 3.3% (from 21.2% to 20.5%).

The pilot also monitored the **gender of project coordinators** (contact persons). For non-blind evaluations the share of female coordinators increased by 4.7 percentage points from evaluated to retained proposals, while it remained stable under the blind evaluation.

The observed differences in characteristics between blind and non-blind evaluations may be caused by factors other than the use of blind evaluations. Although the connection is plausible, it is not the only possible explanation<sup>160</sup>.

The analysis of the pilot will be completed once the evaluation of the second stage proposals of all participating calls is finalised, which will allow for further insights in the funding decisions of calls that have been evaluated blindly.

#### *4.4.4 Reformed Ethics Appraisal Process– reducing the burden for applicants and beneficiaries*

The Ethics Appraisal Process of the framework programme was reformed under Horizon Europe. The simplification aims to limit the workload of ethics-related requirements of participants by focusing it on projects involving serious and/or complex questions of ethics. The overall level of compliance with fundamental ethics principles in Horizon Europe research projects is to be upheld.

Ethical research conduct entails the application of fundamental ethical principles to scientific research. Since Horizon 2020, projects have been required to undergo an ethics assessment as part of the Ethics Appraisal Scheme. The process includes a self-assessment at proposal stage, followed by an ethics review procedure, and ethics checks, reviews, and audits during implementation. The purpose of this procedure is to uphold ethics and integrity in research and innovation, which are seen as a prerequisite for achieving excellence.<sup>161</sup>

The step of ethics screening aims to identify proposals involving serious or complex ethics issues. If any such serious and/or complex issues are identified, the proposal is subject to a full ethics assessment, as a result of which ethics requirements are likely to be defined. Conversely, if a proposal does not appear to include serious or complex elements as regards ethics, it is cleared unconditionally.

In a shift towards a trust- and risk-based approach,<sup>162</sup> the new process relies as much as possible on the national frameworks for oversight of research, to avoid unnecessary burden for both beneficiaries and agencies. This is in line with Article 19,<sup>163</sup> which states that actions carried out

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<sup>159</sup> A group of non-blind and predominantly first-stage evaluations was put together for comparison. As the blind evaluation had been applied to all but one two-stage calls in the Work Programme (WP) 2023-24, the control group was constructed from other, similar calls of WP2021-22 and WP 2023-24. To increase the chances that the relevant characteristics were as similar as possible, the cluster and area of research were given priority in the matching, over the number of stages of the calls (some single stage calls were included). Research area and cluster are assumed to have the stronger effect on the change in characteristics of applicants and evaluation experts.

<sup>160</sup> The pilot's design (non-random allocation of treatment, design of control group) means that observed effects may be due to correlation.

<sup>161</sup> COM(2021) 407 final. Proposal for a Council Recommendation on a Pact for Research and Innovation in Europe.

<sup>162</sup> Evaluation support study on Horizon Europe's contribution to a Resilient Europe, page 124.

<sup>163</sup> Regulation (EU) 2021/695.

under the Programme must comply with ethical principles and relevant Union, national and international law, as well as relevant Charters.<sup>164</sup>

The new approach to the ethics appraisal process contains new elements (listed below) that have the aim to streamline and clarify the application and implementation process, reducing the administrative burden for the parties involved, whilst preserving high ethics and integrity standards.

- Guidance documents include references to the European Code of Conduct for Research Integrity.<sup>165</sup> Similarly, references have also been introduced in the Model Grant Agreement. Applicants must formally declare that their activities are compliant with the Code.
- The Guide for proposal submission and evaluation provides guidance for (potential) applicants is more extensive compared to the 2015 version, and it includes, among other things, a reference document on the consistent use of GDPR in the processing of personal data for research purposes.
- The ethics self-assessment is now included in part A of the proposal as a form generated by the IT system. Supporting documents can be provided in part B only if the application contains considerable issues or risks. This is a major change compared to Horizon 2020, where this type of supporting information had to be provided regardless of the nature of the proposal.
- The screening process in Horizon Europe adopts a clearer approach to identifying projects with serious and/or complex issues, therefore limiting unnecessary administrative burden for applicants and agencies.
- Applicants are required to confirm at application stage that their research has an exclusive focus on civil applications, or that it meets relevant legal requirements if it falls under the ‘dual use’ domain. Research that could have implications for security is no longer covered under the Ethics Appraisal Scheme (instead, it is examined as part of a specific security review). Guidance has been developed to this extent.<sup>166</sup>

Beneficiaries, responding to the **targeted survey**, are overall satisfied with the new ethics self-assessment: 37% (239 respondents) reported that their experience with the ethics self-assessment was positive ‘to a large extent’ and without issues, 27% (173) said it was positive ‘to a moderate extent’, since they had encountered minor challenges, and 3% (20) having a rather negative or negative experience (with some issues or significant issues).<sup>167</sup> Additionally, ethics and integrity were considered important topics by Public Consultation respondents: more than half (54%, 1 037)

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<sup>164</sup> European Commission (2024). Evaluation study of the European framework programmes for research and innovation for an innovative Europe – Report phase 2 (support study for the interim evaluation of Horizon Europe), page 660. Available at: <https://op.europa.eu/en/publication-detail/-/publication/6aeb2414-64e8-11ef-a8ba-01aa75ed71a1/language-en>.

<sup>165</sup> All European Academies (2023). The European Code of Conduct for Research Integrity Revised Edition 2023. Available at: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/european-code-of-conduct-for-research-integrity\\_horizon\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/european-code-of-conduct-for-research-integrity_horizon_en.pdf).

<sup>166</sup> For example: European Commission (2021). How to handle security-sensitive projects. Available at: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/how-to-handle-security-sensitive-projects\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/how-to-handle-security-sensitive-projects_en.pdf).

<sup>167</sup> Evaluation support study on Digital & Industrial, page 531.

indicated that ethics and integrity should be ‘essential’ or ‘high priority’ themes to be elaborated further in the Strategic Plan 2025-2027, with 26% (497) considering them a ‘medium’ priority.<sup>168</sup>

In the targeted survey’s **open question**,<sup>169</sup> some successful applicants’ comments pointed to the fact that the ethics process is still resource-intensive (although it is not always clear whether this refers to the application phase, implementation phase, or both). For instance, a beneficiary noted that clinical trials are already subject to external ethics committees, and therefore appointed an ethics advisor may be redundant; another noted how ethics and gender planning could be integrated into a single document. More generally, other beneficiaries deemed the workload for ethics requirements throughout the implementation phase excessive.

#### *4.4.5 ‘Feedback to Policy’ - targeting EU public sector transaction costs*

The delegation of the R&I framework programme implementation to executive agencies (and other implementation bodies) introduced an organisational separation into the EU Public Services working on the programme. This brought with it the risk of increased transaction costs when sharing information. In response, the **‘Feedback to Policy’ mechanism was introduced as an internal efficiency measure to manage transaction costs and facilitate the flow of information within the EU services.**

Feedback to Policy (F2P) within the Horizon Europe framework programme is a key tool to ensure that information stemming from R&I Research Projects is available for the programme cycle and policy development, this is, that the insights gained from research are effectively used in activities such as the preparation of work programmes, the creation and revision of new legislation and directives.

Based on internal information, the evaluation found that F2P can be a very effective channel for cooperation, particularly where the involved parties have had some **time to gather experience with the mechanism**. The process is at different levels of maturity, depending on the implementation history of each programme part. Challenges of the F2P mechanism include the **need for clearer communication between and consistent implementation across Commission services and agencies**, as well as the need to balance information needs originating from operational and from strategic objectives.

One specific hindering factor in the functioning of F2P is the **mismatch in the timing of the policy cycle and the research framework**, particularly where information is used in legislative contexts. A potential helping factor could be a more **user-friendly IT and data tools**, including the application of AI for data retrieval.

A more streamlined, strategic, and collaborative F2P process lowers the transaction costs of leveraging research findings, which improves the implementation of the framework programme as a whole, enables evidence-based policymaking, and increases the strategic impact of research initiatives.

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<sup>168</sup> European Commission (2024). Synopsis Report - Looking into the R&I future priorities 2025-2027, page 37.

<sup>169</sup> Surveys of applicants carried out as part of the supporting studies.

#### 4.5 Potential for further simplification

This section contains additional background on an approximate **ex-ante assessment of the effects of lump sum funding** in the remainder of the programme.

It also brings together **responses to the open question of the evaluation's main targeted survey of applicants and beneficiaries** had relevant remarks on several topics. Responses have been thoroughly screened to focus on the most concrete and specific contributions, out of the large number received. Although the numbers are small in absolute terms, they do not have to be large or representative to count as a source of evidence in their own right. Contributions are collected in this Annex as a record of evidence for programme development.

##### *4.5.1 Implementation phase - Lump Sum funding potential under Horizon Europe*

Lump sum funding has additional simplification potential beyond what has been achieved so far. As Horizon Europe's primary measure to reduce beneficiaries' administrative burden, it is expected to contribute substantial savings in the remaining years of framework programme. Its use is scheduled to broaden and pick up speed, on a trajectory to cover **half of the annual call budget by 2027**. The evaluation uses current assumptions on this trajectory of: A total of EUR 2.7 billion of the Work Programme (WP) 2024<sup>170</sup> to be spent on lump sum calls; and further lump sum call budgets of EUR 4 640 million (40% assumed share in WP 2025), EUR 4 455 million (45% in WP 2026), EUR 5 000 million (50% in WP 2027).

The evaluation's estimate of achieved lump sum benefits so far (see annex 4.4.2) can be translated into a relationship between expected benefits to total grant value, of around EUR 16 700 to EUR 21 300 savings per EUR 1 million grant value.

Combining this relationship with the expected call budget of lump sum calls, suggests that **simplification from lump sum funding in the remaining years of Horizon Europe is expected to generate an additional EUR 276 million to EUR 351 million in reporting burden reduction.**

This estimate is not robust and should be read as an order-of magnitude figure. The estimate assumes a constant average ratio of lump sum benefits to grant value. It is sensitive to several assumptions on a) future roll out of lump sum funding under Horizon Europe, b) future uptake of lump sum call topics by applicants, c) the characteristics of the lump sum grants that will be signed, as well as the uncertainties around d) the survey evidence on reporting cost savings. In particular, the lump sum grants signed so far may not be representative of those that will be signed under Horizon Europe overall. The proportion of very small grants will likely decrease. This will change the composition of time savings and the share of grant participants who save on expenses for CFS certificates. **The final evaluation of Horizon Europe will be in a position to assess the achieved simplification ex-post.**

##### *4.5.2 Implementation phase - Beneficiaries' feedback and suggestions*

The following section collects relevant contributions from targeted survey responses to the open questions under the structured questions on cost. Out of the vast total number of responses, a number of respondents reported on their experience with the grant implementation process,

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<sup>170</sup> Parts of the lump sum call budget for the work programme 2024 will be spent in 2025.



touching on issues relevant to questions of administrative burden. This smaller number of respondents has been selected for relevance to the topic.

21 contributions state that the **administrative burden is far too high** (e.g. ‘*exceedingly high*’) **to the detriment of the scientific output of the project**<sup>171</sup>. For instance, five respondents complain about unclear and/or incomplete information on questions of grant implementation, which led them to lose time on administrative tasks to the detriment of the project itself.<sup>172</sup> (*‘It is very difficult to know what I should do from the homepage. The manual is not helpful because it is a general manual and not optimized to the [call]’*. MSCA)

- A **concrete suggestion** was submitted that an **EU training session or recorded webinar** would be highly beneficial to on-board new grantees, as much time is lost to understanding the grant (at the same time as the beneficiary is supposed to be working, moving countries and institutions, etc.).

Other contributions gave feedback that the **number of deliverables** that have to be submitted is too high overall.<sup>173</sup>

- A Cluster 5 beneficiary suggests that deliverables, such as **data management plan, ethics and gender planning should be integrated in one document**. Alternatively, a template could be used for these topics to reduce the project manager’s time spent on this activity that ‘tends to be a long document which is mostly “copy paste”.’
- **Project manager rate calculation / single rate** should be simplified for **SMEs** as financial accounting is otherwise too burdensome.

A Cluster 5 beneficiary states that, from FP7 to Horizon 2020 and now to Horizon Europe, the administration **burden has increased**. In their view, it was now more difficult for new entrants and relatively small institutes to compete, not because of a lack of innovation skills or research capabilities, but because of a lack of experience with the proposal and grant agreement preparation and implementing such a project.

A Cluster 2 applicant perceives that a **separate ethics work package for every task** in the project is “*ridiculous*”. A MSCA PF beneficiary states that, instead of researching and incorporating new skills, they spent ‘*almost all of the two years*’ doing paperwork linked to ‘*CDP, DMP, ethics, ongoing report, open access, etc.*’.

- Two ERC Consolidator Grant beneficiaries ask for the requirement to fill out timesheets to be removed.
- A Cluster 5 applicant suggests for coordinators to have a **helpdesk or a help-line for the administrative procedures** (*‘like updated action calendar, reporting actions, event organisation guidelines, etc.’*).

Further contributions on the topic of **Internet interfaces / web portals** are reported in Annex 4.5.3.

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<sup>171</sup> Applicants from CL6 (5), followed by ERC (4), MSCA (4), CL5 (3), CL1 (3), and CL4 (2).

<sup>172</sup> MSCA PF (2), MSCA SE (1) and ERC STG (1)

<sup>173</sup> Specifically raised by 5 respondents from CL4, CL 5 and CL 6.

#### 4.5.3 Application phase - Applicants' feedback and suggestions

**Responses to the open question of the evaluation's main targeted survey of applicants and beneficiaries** had relevant remarks on several topics that point at issues in the application process. This topic area attracted most comments.

##### *Proposal template*

40 respondents pointed out issues with the proposal template. 22 of these highlighted an **imbalance between the maximum permitted length of the proposal and the amount of information requested in the application**. 9 respondents commented that the number of pages in the template is too low compared to the amount of information requested in the application<sup>174</sup>. Respondents mention that **the lack of space compromises the scientific quality of the proposal**, and that the page limit is “counterproductive to expose complex disruptive projects”. One Cluster 6 respondent in particular applauds reducing the number of pages from 70 to 45, but ‘finds it strange that the same amount of questions and information is then asked’. 4 respondents state that the proposal template is too long<sup>175</sup>. Two contributions referred to **other funding agencies that required shorter proposals for similar support** (CZI mentioned by INFRA applicant; Danish funding system mentioned by MSCA DN applicant).

Respondents suggested **concrete improvements to the proposal templates**:

- The tables in the **proposal template** take up too much space, **forcing repetition of information in text and tables**, that fonts are not correct in several sections and suggests **reducing size of headings in some tables** to allow more space in the scientific explanations. (EIC Pathfinder respondent)
- The **three separate tables in the application template should be joined into a single table with 3 columns** and be **available in word format** and not just rtf with the correct heading formatting. (Cluster 6 respondent)
- Where AI is used by Horizon's submission platform it should be limited to a role as a guiding tool and support, while the **actual submitted document** should be in the form of a **rich text document that can be edited by the applicant**. (EIC Pathfinder respondent)

##### *Application guidance*

A total of 35 respondents provided feedback on the guidance for the proposal writing process. Applicants mentioned that they **would have appreciated more support throughout the application process** from both Horizon Europe, NCP's and the applicants' own institutes.

Two concrete suggestions on how to improve the guidance material were received:

- An **anonymous repository of previous evaluations/comments for MSCA PF applicants would be helpful** to have an overview of what applicants tend to miss. (MSCA PF applicants)
- It would greatly help to **split the application guidance by call, as the 100+ page guide is daunting** (MSCA PF applicant)

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<sup>174</sup> Close to half of these applicants being MSCA PF applicants, but also CL 3, CL4- 6 and EIC pathfinder applicants.

<sup>175</sup> 1 INFRA, 1 Cluster 1, 1 Cluster 6 and 1 MSCA Doctoral Networks applicant.

### *Internet interfaces / web portal*

Complaints focused particularly on the **web portal via which proposals and reports are submitted**. (examples in *italic*)

- Users criticise the **portal's design** and characterise it as confusing to navigate, not user friendly, too complicated/complex and point out that this substantially adds to their **stress and costs**. The design is also perceived as **slow** and **outdated** (*'so many windows opening all the time'*).
- Several contributions highlight the portal's **lack of reliability/stability**. The Funding and Tenders portal regularly **loses information** that has been entered, in particular, *'in Form A'* and *'when two or more people are editing the "forms",* and that it is **unclear whether content was saved** and at what point *'when switching between different parts (budget-personal data).'* The **unreliability hinders collaboration** between applicants contributing to a proposal. (*'If the commission wants to encourage consortia with a large number of partners, it should make it so that we are not dependent on only being one partner on the portal at the time.'*)
- Users report the portal being **frequently under maintenance** and it being **not fit for purpose**. (*'The system had lots of bugs and kept crashing, and the submission deadline was eventually extended. The system did not allow the correct input of all the required information, which we were eventually told to ignore. Communication was poor throughout.'*; ERC STG)
- The web **portal's language** is experienced as **unclear**. (*'The website was (...) verbose, (...) it was hard to learn and keep track of the various different terms to know I was following the correct links, in the proper section, etc.'*; MSCA PF)
- 5 detailed responses raise complaints with the **EIC's** (former and now redundant) application platform and highlight a **lack of coherence** of the **documents generated via the platform's Artificial Intelligence**. (*'When you finally produce the Business plan it is not clear and much of the inputs are repeated in multiple parts.'*, EIC Accelerator; *'does not enable systematic and coherent information to be presented,'*, EIC Pathfinder; *'makes it really difficult to present the project in a coherent way'*.)
- "My project management" sends out **inefficient** and **indirect communication about updates** via generic, insufficiently targeted emails that then required logging into the portal to find out whether the update is relevant for the receiver of the email.
- Funding and tender opportunities portal (**SEDIA**) is experienced as **lacking flexibility** 'compared to its previous version' It also poses technical challenges during the submission process. (INFRA applicant)
- The user experience of the online **grant agreement preparation platform** is flagged as negative, due to **user-unfriendly, overly complicated** design and a lack of integration of relevant **guidance**. (*'a PAIN'*, *'at least some design review should be mandatory, because it is astonishing how much time is wasted in understanding how to navigate and use such a platform.'*, both Cluster 4)

Apart from a **general review and redesign** of the inefficient and ineffective parts of the portals, concrete **suggestions for improvements** included:

- When **errors** occur during the validation of a form (in particular researcher information form), the **error message should indicate which partner causes the error**, to enable a follow up.
- There should be an **option to indicate that a consortium partner does not have any researchers in the project** (e.g. industry partners), so that the coordinator is not unnecessarily warned about this fact when the application is validated.
- Information on the applicant's department, etc. should be **stored for later use in the system**, so the information does not have to be entered again each time.

*Use of consultants (for consultant fees, see Annex 4.1.2.3 to application cost)*

A total of 35 applicants commented on the use of consultants during the application process, 25 of which mention that the **high complexity** and '**excessive bureaucracy**' of the **application is creating a market for consultants**. Respondents came from across the programme parts, with **EIC applicants** being the most numerous (10 of 25).<sup>176</sup> Applicants are concerned the use of consultants creates an **unfair advantage** for applicants that can afford hiring consultants, compared to applicants that don't have the funds to do so.

One unsuccessful EIC Accelerator applicant comments the process's complexity has created an **industry of consultants and grant writing agencies**, which might not always serve the EIC's best interest, as these agencies try to work in the system and **please the evaluators rather than create solid businesses**. The applicant suggests simplifying the process to a more **accessible**, using a **industry-standard approach**, and so making it more manageable for a broader range of startups.

Another unsuccessful EIC Accelerator applicant comments that for a small **SME** applying takes a substantial investment (EUR 20 000 in addition to time). In the applicant's view it was **impossible to compete without experienced experts/consultants on board**. The applicant mentions not being able to afford to spend more money on re-submitting a second time.

A Cluster 4 applicant stressed that the proposal preparation process is too complex and expensive for an **SME**, particularly of "**peripheral countries**", with "**the real beneficiaries of Horizon Europe**" being "**the consultants**".

#### *4.5.4 Proposal evaluation phase - Applicants' feedback and suggestions*

Responses to the open question about the proposal evaluation process raised relevant points on the **quality of the evaluation and of evaluators (21 responses)**.

i) A perceived inconsistent quality of evaluations (final ranking points): **Proposals, which had been amended according to previous evaluation comments and resubmitted, received (much) lower scores when resubmitted**. This was raised in 14 comments, of which 10 came from MSCA PF applicants<sup>177</sup>. For instance, one 2021 MSCA PF applicant reported they obtained a score of 75% for a resubmitted, improved proposal, down from 92.4% for the previous submission. For context, **15 400 proposals** were submitted to the **2021 and 2022 MSCA PF calls**, which were almost all evaluated, and out of which 2994 responded to the survey. Seen in this light, 10 MSCA PF proposals are not many. However, open questions intend to collect **anecdotal evidence**, which

<sup>176</sup> 6 EIC Accelerator; 4 EIC Pathfinder; 3 Cluster 4; 3 Cluster 6; 2 Cluster 5; 1 Cluster 1; 3 MSCA DN; 2 EIE; 1 ERC COG.

<sup>177</sup> as well as 1 MSCA DN, 2 ERC COG and 1 ERC STG.

does not need to be representative (across the population of applicants) to be useful. It is a **starting point for follow up actions** to establish whether a more general problem exists or not.

ii) Perceived inadequate quality of evaluation expert: Several comments centred on a perceived insufficient scientific expertise of the evaluator and the bias of the evaluators. (5 responses)

#### *Partial randomisation (lottery) in evaluation process*

Ten respondents suggest that **lotteries/ partial randomisation** should be introduced in the Horizon Europe evaluation process. Responding applicants came from across the programme<sup>178</sup>. The reasoning of all respondents is similar and revolves around the following rationale: The evaluation process is vulnerable to/ subject to the bias of evaluators, because it is difficult to objectively differentiate between proposals of (very) high quality. A partial randomisation might help overcome this bias by, for instance, introducing lotteries, as currently also tested by other funding programs.

Concrete suggestions included two ways of applying lotteries:

- Lotteries could be used for **all highest ranked proposals above a certain percentage threshold**. One MSCA DN applicant suggested that “*It would be better, as other funders are beginning to introduce, if every proposal above a certain threshold (e.g, 85% or 90%) was entered into a lottery for funding*”, as “*there simply is no objective way to differentiate between highly ranked proposals.*”
- Lotteries could be used for **proposals ranked just below the score of actually funded proposals** (e.g. proposals awarded with the Seal of Excellence).

#### *Communication about award*

Five applicants commented that the **communication of the outcome of their application was either too slow or unclear**. In an extreme case, one MSCA PF applicant reports spending nearly one day to understand that the project had been selected for funding.

Another MSCA PF applicant mentions that the **grant invitation letter** was addressed to the supervisor of the project and not the researcher, which **prevented the researcher to obtain a visa** based on research excellence.

#### *Interview process*

19 applicants raised issues concerning the interviewing process, seven (all of them ERC applicants) mentioning underperformance of the online format due to technical issues. Two applicants specifically mentioned that technical glitches and failure of Webex contributed to stress and inability to appropriately answer questions. Another applicant mentions that a fully online format would be a better interview format.

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<sup>178</sup> 1 MSCA PF, 1 MSCA DN, 1 ERC COG, 1 ERC STG, 1 ERC ADG, 2 CL2, 2 EIC Pathfinder and 1 EIC Transition.



#### 4.6 Annex 4 - Summary Tables

| <b>Table 1. Overview of costs and benefits identified in the evaluation</b>  |                                 |  |  |         |   |   |  |         |  |
|--|---------------------------------|--|--|---------|---|---|--|---------|--|
|  | <b>Citizens/<br/>EU Society</b> |  | <b>EU Public<br/>Administration</b>  |         | <b>Horizon Europe<br/>Beneficiaries</b> |   | <b>Horizon Europe<br/>Applicants</b>   |         |  |
|  | Quantitative                    | Comment  | Quantitative   | Comment | Quantitative                            | Comment   | Quantitative   | Comment |  |
| <b>I. BENEFITS</b>   |                                 |  |  |         |   |   |  |         |  |
| <b>1. Indirect long-term welfare benefits for EU society from scientific impact &amp; related benefits to participants</b> | one off                         | <p><b>Direct scientific output with EU society</b></p> <p>48.68% of the projects with EU citizens' or end-users' contribution</p> <p><b>KIP 3: 86.8%</b> of publications are <b>Open Access</b></p> <p><b>KIP 3: 72.8%</b> of datasets are <b>Open Access</b></p> <p><b>KIP 3: 54.1%</b> of software applications are <b>Open Access</b></p> | <p><b>Horizon Europe creates knowledge, strengthens EU human capital in R&amp;I, fosters diffusion of knowledge in the public sphere (open science), and addresses global challenges through R&amp;I.</b></p> <p>In the long run, the supported activities are expected to lead to <b>sizable and wide-ranging welfare benefits to EU society</b> (economic, social, and environmental benefits)</p> |         |   | <p><b>KIP 1: 6 922 peer reviewed scientific publications</b> (H2020*: 2827 peer reviewed publications)</p> <p><b>KIP 4: 9 463 publications</b> linked to SDGs</p> <p><b>KIP 2: 95 156 researchers</b> benefitting from upskilling activities</p> <p><b>KIP 2: 8 307 MSCA researchers</b> benefited from mobility grants (dashboard)</p> <p><b>KIP 2: 1 662 ERC researchers</b> benefited from</p> | <p><b>Direct scientific output of Horizon Europe (benefit to researcher)</b> linked to expected long-term welfare benefits from scientific impact (Number as of 6 January 2025)</p> <p>*) Note: all figures referred to as "H2020:" provide baseline figures of the first 3 years and 3 months of the programme, unless indicated otherwise. If no metric is stated for H2020, no comparable</p> |         |  |

|  |         |  | Data as of 6 January 2025  |  |  | mobility grants (dashboard)  | metric was available.                                   |  |  |
|--|---------|--|--|--|--|--|---|--|--|
| <p><b>2. Indirect wider economic benefits for the EU economy</b> from diffusion of innovation &amp; related benefits to participants</p> | one off | <p><b>KIP 9:</b> total expected GDP impact</p> <p><b>€14 billion</b> (2021-2033)</p> <p>(H2020* final evaluation: €287 billion to €420 billion over 17 years (2014 -2030))</p> <p><b>KIP 8:</b> <b>39 543 FTEs</b> created or maintained in organisations</p> <p><b>H2020:</b> <b>17 365 FTE</b></p> <p><b>Total FTEs</b> created or maintained: <b>63 000</b> (2021-2034)</p> | <p><b>Horizon Europe fosters innovation-based growth, created jobs and leveraged investments in R&amp;I.</b></p> <p>(NEMESIS model, 'medium' scenario)</p> <p>*Note: H2020 final evaluation range/sensitivity using QUEST, NEMESIS</p> <p><b>Indirect impact on employment</b> (Kip 8: monitoring data, as of 6 January 2025) (forecast NEMESIS model)</p> |  |  | <p><b>KIP 7: 124 IPR outputs</b>, including patent applications, trademarks, and utility designs (<b>H2020: 5 IPR</b> applications)</p> <p><b>KIP 4: 3 570 innovative outputs</b> linked to SDGs</p> <p><b>KIP 7: 3 703 innovative products, processes, or methods</b> produced and reported by the projects</p> <p><b>550</b> deep tech start-ups and SMEs supported by EIC Accelerator (01 December 2024)</p> <p><b>90</b> start-ups created by students from EIT programmes (end of 2023)</p> | Number as of 6 January 2025, unless indicated otherwise |  |  |

|   |            |   |   |                                     |         |  |         |                                      |         |
|---|------------|---|---|-------------------------------------|---------|--|---------|--------------------------------------|---------|
|   |            |   |   |                                     |         | <b>346</b> start-ups as a result of EIT innovation projects (end of 2023)<br><br><b>5 806</b> start-ups received support from EIT KICs (end of 2023) |         |                                      |         |
| <b>II. COSTS</b>  |            |   |   |                                     |         |  |         |                                      |         |
|   |            | <b>Citizens/<br/>EU Society</b>   |   | <b>EU Public<br/>Administration</b> |         | <b>Horizon Europe<br/>Beneficiaries</b>  |         | <b>Horizon Europe<br/>Applicants</b> |         |
|   |            | Quantitative  | Comment   | Quantitative                        | Comment | Quantitative   | Comment | Quantitative                         | Comment |
| <b>1. Direct economic cost<br/>of R&amp;I funding<br/>to EU society</b> | one<br>off | Paid:<br><b>€ 30 883million</b><br>(35%)<br><br>Committed:<br><b>€ 56 561million</b><br>(64%)<br><br>Op. exp. budget:<br>€ 88 322 million<br><br><b>(H2020: 38% of the total Horizon 2020 budget (incl. admin. exp.) had been committed in first 3 years)</b> | <b>Operational Expenditure</b><br>as of 31/12/2024<br>(Percentage share of op. exp. budget)<br><br>(Percentage share of op. exp. budget)<br><br>(2021-2027. as of 31/12/2024)<br><br>(No direct comparison with % of operational expenditure budget possible) |                                     |         |  |         |                                      |         |

|   |            |  |   |  |   |  |   |  |  |
|---|------------|--|---|--|---|--|---|--|--|
| <b>2. Administrative costs</b><br>of implementing the<br>R&I framework<br>programme<br><b>to EU Public Sector</b> | one<br>off |  | Costs of<br>administrating<br>Horizon Europe<br>are incurred by<br>the public sector<br>at European<br>level but are<br>ultimately a cost<br>on EU Society. | Paid:<br><b>€ 3 174 million</b><br>(56%)<br><br>Committed:<br><b>€ 3 317 million</b><br>(59%)<br><br>Adm. exp. budget:<br>€ 5 623 million<br><br><b>4.01%</b><br>Target: 5 % | <u><b>Administrative<br/>Expenditure</b></u><br>as of 31/12/2024<br>(Percentage share<br>of admin. exp.<br>budget)<br><br>(Percentage share<br>of admin. exp.<br>budget. No point<br>for comparison<br>with H2020)<br><br><b>Administrative<br/>Expenditure as<br/>percentage of<br/>overall<br/>expenditure</b> (as<br>of 21/11/2024)<br>(as per definition:<br>only budget in<br>legal basis, only<br>indirect research,<br>i.e. excl. JRC) |  |   |  |  |
| <b>3. Beneficiaries'</b><br><b>administrative costs</b><br>of participation                                       | one<br>off |  |   |  |   | <b>€ 4.75 billion</b><br>to<br><b>€6.47 billion</b><br>(1/1/2025)<br><br>(H2020*:<br>€ 135 million<br>to € 215 million<br>over entire FP)<br><br>Level of confidence<br>in Horizon Europe<br>estimate is<br>medium/high. | <b>Total<br/>beneficiaries'<br/>administrative<br/>costs over<br/>project lifetime</b><br>of all projects<br>signed under<br>Horizon Europe<br>so far, as of<br>1/1/2025)<br><br>*H2020 final<br>evaluation;<br>estimate not<br>robust) |  |  |

|   |         |  |  |  |  |   |   |   |   |
|---|---------|--|--|--|--|---|---|---|---|
|   |         |  |  |  |  | <p>(Difference between HE and H2020 estimate likely driven by data quality and survey question.)</p> <p><b>€ 7.41 billion to €10.10 billion</b></p> <p><b>6% to 10%</b> of the project budget</p> | <p><b>Total expected administrative costs of beneficiaries</b> over entire HE programme</p> <p><b>Administrative cost of project</b> (median respondents) (5 161 survey responses of beneficiaries)</p> |   |   |
| <b>4. Application costs of successful and unsuccessful applicants</b> | one off |  |  |  |  |   |   | <p><b>€ 1.92 billion to € 2.82 billion</b> (1/1/2025)</p> <p>H2020 (total) *: € 5.61 billion to € 11.25 billion</p> <p><b>€ 21 000 to € 32 000</b> (1/1/2025)</p> <p>H2020*: €18 000 to €37 000</p> | <p><b>Total cost of applicants</b> (robust)</p> <p>*H2020 final evaluation; estimates not robust)</p> <p><b>Average cost / proposal</b></p> |



|  |  |  |  |  |  |  |  |   |  |
|--|--|--|--|--|--|--|--|---|--|
|  |  |  |  |  |  |  |  | <p><b>No substantial change</b><br/>of application cost between HE and H2020</p> <p><b>36 to 45 person-days</b></p> <p><b>16 to 25 person-days</b></p> <p><b>36 to 45 person-days</b></p> | <p><b>Qualitative evidence:</b><br/>(4051 survey responses successful &amp; unsuccessful applicants)</p> <p><b>Time cost</b><br/>(median respondent)</p> <p><b>coordinator</b></p> <p><b>consortium partner</b></p> <p><b>mono-beneficiary</b></p> |
|--|--|--|--|--|--|--|--|---|--|

**TABLE 2: Simplification achieved and further potential**

**PART I: Simplification and burden reduction (savings already achieved)**

*Simplification, burden reduction and cost savings **achieved already** by Horizon Europe, including points of comparison where available.*

|  | Citizens/ EU Society |         | EU Public Administration |   | Horizon Europe Beneficiaries  |  | Horizon Europe Applicants  |   |
|--|----------------------|---------|--------------------------|---|---|--|--|---|
|  | Quantitative         | Comment | Quantitative             | Comment   | Quantitative  | Comment  | Quantitative   | Comment   |
| <p><b>Administrative cost savings for beneficiaries</b> through removing all financial reporting requirements (due to <b>lump sum funding</b>), thus reducing a beneficiary's reporting burden (administrative costs). Lump sum grants also help to avoid financial errors and contribute to a shift of focus during the grant implementation stage, away from financial controls, back to a project's content. The measure changes the administrative costs of the EU public sector (implementing bodies) and a potentially negative effect on applicant costs (current evidence suggests insignificant).</p> |                      |         |                          |   |   |  |  |   |
| <p><b>One-off</b><br/>(change from Horizon 2020 to Horizon Europe)</p>   |                      |         | n/a                      | <p><b>Cost savings</b> from no longer having to process financial reporting documents [qualitative feedback]</p> <p><b>Additional costs*</b> per evaluator of a lump sum grant proposal due to increased complexity (e.g. assessing a budget table) [qualitative feedback]</p> <p><b>Transition costs*</b> due to adjustment of workflows, familiarising with changed implementation practices [qualitative feedback on experience]</p> | <p><b>6 to 8 person-days per reporting period and consortium member</b></p> <p><b>96 to 128 person-days</b> per (non-ERC PoC) lump sum grant, or</p> <p><b>€ 33 200 - € 44 200</b> per (non-ERC PoC) lump sum grant</p> | <p><b>median financial reporting cost savings</b> of lump sum grant beneficiaries</p> <p>median reduction in time spent on financial reporting per grant, over the project's lifecycle, excluding ERC proof-of-concept grants (POCs)</p> | <p><b>Low</b><br/>(no cause for concern so far. Will have to be monitored)</p> | <p><b>Cost of applicants</b> of lump sum calls (including <b>hassle cost</b>) from having to submit budget information in an additional <b>'budget table'</b> format, instead of keeping it on file</p> <p>[qualitative evidence from 2 surveys 2023; see Annex 4.4.2 - Costs and side-effects of lump sum funding]</p> |

|  |  |  |   |  |   |  |   |  |
|--|--|--|---|--|---|--|---|--|
|  |  |  |   | with lump sum funding so far]<br>*Costs and side-effects of lump sum funding   | 6 to 8 person-days, or €1 800 to € 2 500<br><br>€ 4 500 per certificate<br><br>€ 49.8 million to € 63.4 million | burden reduction per ERC PoC mono-beneficiary, over the project's lifecycle<br><br>savings on certificate of the financial statements (CFS) for EU contributions above € 430 000<br><br>Total savings over a lump sum project lifecycle, including savings on CFS, for grants that have been signed by Jan 2025 (including ERC POCs) |   |  |
| <b>Type of cost savings?</b> Blind evaluation of proposals to <b>improve evaluation process</b> through safeguarding it against possible biases of the evaluating expert. Costs of implementation, mainly for public administration. Benefits for applicants |  |  |   |  |   |  |   |  |
| <b>Recurrent</b><br>(change from Horizon 2020 to Horizon Europe)   |  |  | <b>Non-negligible</b><br>increase in some cases<br>(Some call | <b>Implementation Bodies:</b> more time* spent on 'admissibility checks' by call coordinators to make sure that applicants |   |  | Some extra effort but measure viewed as a general | <b>Benefit of fair treatment</b><br><br><b>&amp;</b><br><b>Extra effort*</b><br><b>anonymising</b> |

|   |  |  |   |   |  |  |   |   |
|---|--|--|---|---|--|--|---|---|
|   |  |  | co-ordinator: “roughly three times longer”) | could not be identified in the proposals, additional workload [qualitative feedback]<br>*Costs and side-effects of blind evaluation |  |  | improvement;<br><br>Observed: more ‘widening’ country applicants that passed first stage (correlation only) | <b>proposals</b> , [qualitative feedback]<br><br>*Costs and side-effects of blind evaluation  |
| <b>Administrative cost savings for applicants and beneficiaries</b> due to reformed <b>ethics appraisal</b> process |  |  |   |   |  |  |   |   |
| <b>One-off</b><br>(change from Horizon 2020 to Horizon Europe)  |  |  |   |   |  |  | n/a   | Reduced workload for proposals that involve neither serious nor complex ethics questions [qualitative feedback]<br><br>91% of the Horizon Europe proposals so far cleared without any further conditions or requirements linked to ethics, 9% given specific ethics conditions<br><br>H2020: 44% and 55% of |

|  |  |  |  |  |  |  |  |                           |
|--|--|--|--|--|--|--|--|---------------------------|
|  |  |  |  |  |  |  |  | proposals<br>respectively |
|--|--|--|--|--|--|--|--|---------------------------|



**PART II: Potential simplification and burden reduction (savings)**

Identified further potential simplification and savings **that could be achieved** with a view to make the initiative more effective and efficient without prejudice to its policy objectives<sup>179</sup>.

|  | Citizens/ EU Society |         | EU Public Administration |         | Horizon Europe Beneficiaries |         | Horizon Europe Applicants |         |
|--|----------------------|---------|--------------------------|---------|------------------------------|---------|---------------------------|---------|
|  | Quantitative         | Comment | Quantitative             | Comment | Quantitative                 | Comment | Quantitative              | Comment |

Application of unsuccessful applicants are an area with a potential for efficiency savings for the framework programme. The evidence base of the evaluation does not allow to specify any new simplification measures to the extent, that they could be assessed in terms of their expected costs savings'. Potential existing measures that could be extended include: a targeted, carefully tested and designed use of the **two-stage evaluation processes**; and any measures that prevent the loss of the value inherent in successful-unfunded proposals (proposals above the quality threshold but that remained unfunded due to the budget constraint) and allow it to be captured for alternative funding applications at EU or national level. This may include the Seal of Excellence measure, after a detailed *ex ante* assessment.

|         |  |  |     |  |  |  |     |  |
|---------|--|--|-----|--|--|--|-----|--|
| One-off |  |  | n/a | Public sector administrative expenditure related to proposal evaluation costs are an area with a potential for efficiency savings, to the extent that a duplication of an evaluation can be avoided. |  |  | n/a | Application costs of unfunded proposals are an area with a potential for efficiency savings for the framework programme overall. |
|---------|--|--|-----|--|--|--|-----|--|

**Lump sum** funding involves the paying out of pre-agreed lump sums (that were specified in the proposal by the grant beneficiary) after the completion of a work package. It renders obsolete the financial reporting (by beneficiary) and the checking of financial reports, as well as the reimbursement of detailed eligible costs by the EU public administration). The evaluation of the lump sum pilot suggests that a wider use of lump sum funding likely has some simplification potential to reduce beneficiaries' administrative costs and address the persistence of frequent financial errors, highlighted by the European Court of Auditors. The net effect on costs depends on details of implementation.

|         |     |   |     |   |                                       |   |     |  |
|---------|-----|---|-----|---|---------------------------------------|---|-----|--|
| One-off | n/a | The use of lump sums has the potential to reduce financial errors by removing financial reporting and the reimbursement on the basis of eligible costs (both sources of financial errors in R&I funding). The extent to which a reduction of errors can be achieved, and a reduction of the error rate can be observed, depends on details of implementation, including that of <i>ex post</i> project reviews and any changes to the audit strategy. While the rationale of lump sum funding supports the assumption that financial errors will overall be reduced, the piloted projects have not yet generated any <i>ex post</i> evidence to allow for a validation of this assumption and an <i>ex ante</i> estimation of | n/a | Public sector administrative expenditure is expected to change due to multiple factors. The direction of the net effect on public sector costs depends on implementation details that determine the additional workload of proposal evaluators and possible adjustment costs for project officers. The net effect will also be affected by beneficiaries' strategic behaviour (unintended effects) in response to the measure over the medium-term. The currently available evidence base is insufficient to assess the | <b>€ 276 million to € 351 million</b> | Potential simplification from lump sum funding under Horizon Europe during 2025-2027, based on the ratio of benefits-to-grant-value and current assumptions about future roll out (based on data as of: 1 January 2025) | n/a | Application costs may increase, as proposals have to submit an additional budget table for the project, to justify the lump sums. The cost of generating the budget information is not fully additional but to a large extent part of the baseline: Project management best practice and existing requirements of the programme mean that applicants are assumed to calculate the project budget at proposal stage already. However, adapting the budget to the format, structure and level of detail requested in the proposal template and filling in the template gives rise to additional costs. Any change will be affected by details of implementation, including the |
|---------|-----|---|-----|---|---------------------------------------|---|-----|--|

<sup>179</sup> This assessment is without prejudice to a possible future Impact Assessment.

|  |  |                                |  |   |  |   |  |   |
|--|--|--------------------------------|--|---|--|---|--|---|
|  |  | future simplification effects. |  | direction or magnitude of the net effect on public sector administrative costs. |  |   |  | availability and user friendliness of guidance for applicants. The currently available evidence base is qualitative and does not allow a quantification of the expected effect on applicants. |
| Potential of the “ <b>Personnel unit costs</b> ” measure to reduce financial reporting burden on beneficiaries of actual cost grant. This optional method allows participants to calculate and report personnel costs using a single daily rate that applies to all staff that is agreed upfront for all future grants of the beneficiary. |  |                                |  |   |  |   |  |   |
| One-off  |  |                                |  |   |  | The use of personnel unit costs has the potential to remove the burden of calculating personnel costs per staff member, which typically takes about <b>2 person-days</b> per consortium member and per reporting period |  |   |

## Annex 5 Stakeholder consultation

In support of this evaluation, a broad range of consultation activities were conducted: the call for evidence, the public consultation, interviews, surveys of participants and beneficiaries as well as targeted consultations and a dedicated workshop meant to complement the findings of the public consultation held on 29 June 2023.

To ensure that all possible views are well reflected and to ensure transparency and accountability, consultations with various categories have been held in the frame of the interim evaluation of Horizon Europe. The consultation process did not start from zero, as the Commission based its work on the consultations that took place in 2016 for the interim evaluation of Horizon 2020<sup>180</sup> which provided useful information on the mapping, priorities and views of all major interested parties.

### Stakeholder mapping

Stakeholder groups that are concerned by Horizon Europe can be broken down into the following categories: academia, businesses (including small and medium-sized enterprises), National Contact Points<sup>181</sup> and public authorities as well as non-governmental, research and umbrella organisations.<sup>182</sup>

Beyond that, the following Institutions have in the past contributed to the evaluation of the Framework Programme:

- the Council conclusions<sup>183</sup> on the Interim Evaluation of Horizon 2020, adopted on 01/12/2017,
- the European Parliament, which reported on the assessment of Horizon 2020<sup>184</sup> and the implementation in line with the interim evaluation,<sup>185</sup>
- the European Economic and Social Committee that provided recommendations for the interim evaluation of Horizon 2020<sup>186</sup>, the ex post evaluation of Horizon 2020<sup>187</sup> as well as an exploratory opinion on results and experiences of efforts to close the innovation gap in the EU in the light of Horizon 2020 and Horizon Europe<sup>188</sup>,

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<sup>180</sup> Results of the Horizon 2020 Stakeholder Consultation, 2018, <https://op.europa.eu/s/yXBt>

<sup>181</sup> National Contact Points (NCPs) are independent organisations of different nature (e.g. Ministries, Academies of Science, Research agencies) that act as information providers to applicants in their native language. They are based in all EU countries and Associated States as well as in some non-European countries.

<sup>182</sup> So-called ‘umbrella organisations’ are industry-specific associations of EU public interest.

<sup>183</sup> Council conclusions 15320/17 <https://www.consilium.europa.eu/media/31888/st15320en17.pdf>

<sup>184</sup> Briefing: Interim evaluation of Horizon 2020 [https://www.europarl.europa.eu/RegData/etudes/BRIE/2018/614771/EPRS\\_BRI\(2018\)614771\\_EN.pdf](https://www.europarl.europa.eu/RegData/etudes/BRIE/2018/614771/EPRS_BRI(2018)614771_EN.pdf)

<sup>185</sup> European Parliament Report on the assessment of Horizon 2020 implementation (A8-0209/2017) [https://www.europarl.europa.eu/doceo/document/A-8-2017-0209\\_EN.pdf](https://www.europarl.europa.eu/doceo/document/A-8-2017-0209_EN.pdf)

<sup>186</sup> European Economic and Social Committee recommendations: interim evaluation of Horizon 2020 <https://www.eesc.europa.eu/en/our-work/opinions-information-reports/information-reports/interim-evaluation-horizon-2020>

<sup>187</sup> European Economic and Social Committee Information report: ex post evaluation of Horizon 2020 <https://www.eesc.europa.eu/en/our-work/opinions-information-reports/information-reports/ex-post-evaluation-horizon-2020>

<sup>188</sup> European Economic and Social Committee exploratory opinion: results and experiences of efforts to close the innovation gap in the EU in the light of Horizon 2020 and Horizon Europe <https://www.eesc.europa.eu/sl/our-work/opinions-information-reports/opinions/results-and-experiences-efforts-close-innovation-gap-eu-light-horizon-2020-and-horizon-europe-programme>

- the Committee of the Regions and the European Research Area and Innovation Committee which is a policy advisory body whose main mission is to provide strategic input on any research and innovation issue relevant to the development of the European Research Area.<sup>189</sup>

Next to the consultation activities that were accessible via the [‘Have your say’ portal](#), targeted consultations in the forms of workshops, interviews and a joint survey were conducted under the remit of the various external evaluation studies, specifically addressing applicants, participants national and regional authorities as well as business representatives.

### *Interviews*

The main objective of conducting interviews was to gather evidence from different actors concerned by the Framework programme, offering the possibility to give an objective assessment by taking into account the different views. Interviews were particularly used in case studies as well as international benchmarks. Beyond that, interviews were conducted to confirm and complement data collection to support the drafting of findings and conclusions.

In total, 1 049 interviews<sup>190</sup> were conducted in support of this evaluation – these interviews do include same actors on different topics by gathering large amounts of qualitative data among Member States’ and associated countries’ representatives, EU officials (in the Commission, in Executive Agencies and European Partnerships) as well as various other stakeholders (such as Programme committee members, expert group members and industry representatives (e.g.), along with other relevant stakeholder groups explored in the stakeholder mapping section.

### *Surveys*

A joint targeted survey was conducted in support of the five evaluation studies which explored the views of beneficiaries and unsuccessful participants in Horizon Europe which was conducted between May and July 2023.

Contractors developed and administered nine online questionnaires to gather evidence on the needs and motives for engaging with Horizon Europe, perceptions of expected project outcomes and impact as well as obstacles encountered throughout application and project implementations. The survey programme encompassed all three pillars of Horizon Europe.

For beneficiaries, it included five different questionnaires to account for different programme parts, namely:

- 1) MSCA Postdoctoral Fellowships beneficiary researchers,
- 2) ERC beneficiary Principal Investigators,
- 3) Beneficiary organisations under collaborative actions (Pillar I, II and III as well as WIDERA),
- 4) the EIC Pathfinder and Transition grants, and
- 5) the EIC Accelerator grants.

For unsuccessful applicants, it included three questionnaires:

- 1) MSCA Postdoctoral fellowships & ERC,
- 2) Horizon Europe’s collaborative actions and

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<sup>189</sup> European Research Area and Innovation Committee,  
<https://www.eumonitor.eu/9353000/1/j9vvik7mlc3gyxp/vh7ej5swwyh>

<sup>190</sup> This included 210 interviews in the frame of the Resilient Europe study, 140 in view of Digital and Industrial Transition, 208 on Excellent Science, 217 on Innovative Europe and 274 in view of the Green transition study.



### 3) EIC accelerator grants.

#### *Policy workshops*

In the frame of the five evaluation studies, each of them held two policy workshops with the exception of the Digital & Industrial Transition study which held five workshops in total.

#### **Call for evidence**

The ‘[call for evidence](#)’ opened on 1 July, 2022 and closed on 29 July 2022. The overall number of responses submitted was 54. This number includes two identical contributions from organisations from the same stakeholder group, which is likely to be an organised campaign. Moreover, four organisations and one individual submitted the same response to the call for evidence on the final evaluation of Horizon 2020 and the interim evaluation of Horizon Europe. Finally, five responses to the call of evidence referred to the position paper attached. 16 position papers were received. However, three of them concerned the evaluation of Horizon 2020 and were considered out of scope. The findings from the feedback received during call for evidence were taken into consideration in the survey design for the public consultation. In view of content moderation, no feedback had to be unpublished as all contributions were in line with the content moderation rules.

#### **Who contributed?**

The stakeholder groups which contributed the most to the call for evidence were academic or research institutions and non-governmental organisations. Each of them accounted for around a quarter of the responses received. Six responses were received from individuals, five from business associations, companies or business organisations and other groups. Four responses were received from public authorities, three of which came from the same national authority. The other response from a public authority came from a local authority. The national authority provided three reports analysing some implementation aspects of Horizon 2020 – notably on participation, proposals and evaluation of proposals. The local authority’s feedback focused on a specific initiative: the mission for 100 climate-neutral and smart cities.

Figure 28: Type of respondents (N= 54)

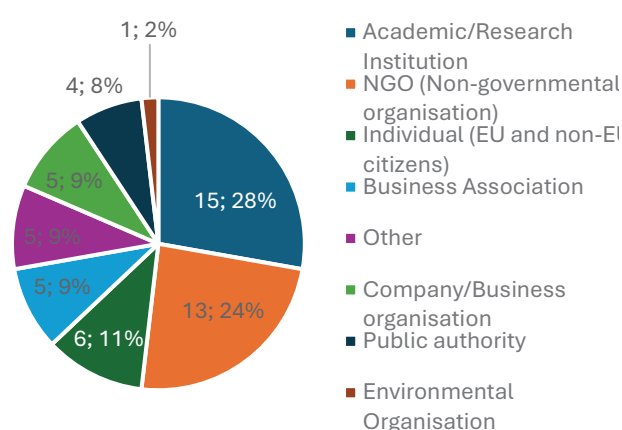
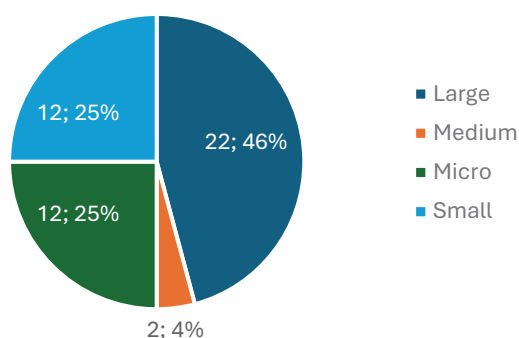
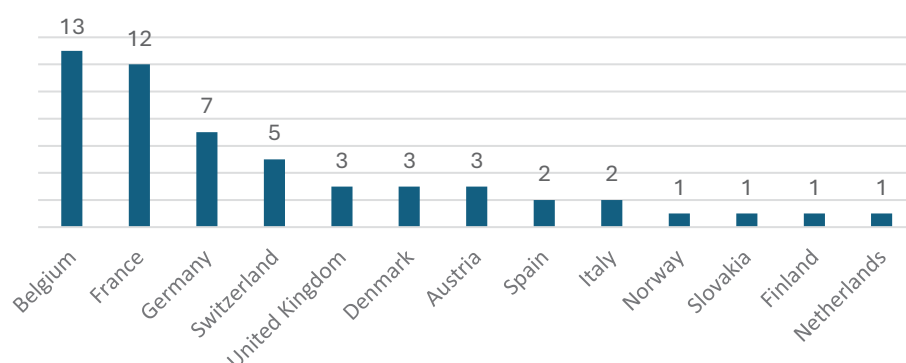


Figure 29: Organisation size (N= 48)



As for the geographical distribution of the responses received, around a quarter were from organisations – mainly business associations and NGOs based in Belgium and active at the European level. 12 responses came from France, half of which are from academic or research institutions, 7 from Germany and 5 from Switzerland.

Figure 30: Country of origin (N= 54)



What aspects are addressed and what are the views and concerns?

The following section summarises the views and comments received. Contributions encompassed several aspects and topics on the Programme's design, its implementation, participation, alignment with the EU priorities and complementarity with other initiatives. Suggestions on aspects that should be considered by the evaluation were also provided.

### Horizon Europe design

**General comments:** Respondents addressed Horizon Europe as an ambitious programme, which has brought novelties and simplifications compared to Horizon 2020. The Framework Programme is seen by stakeholders as a crucial source of funding in the European R&I landscape, for individual and collaborative projects. However, some stakeholders expressed concerns about the complexity of the Programme' structure, with calls from multiple sources such as clusters, partnerships, and missions. In their view, it is essential to ensure good coordination and complementarity of funding within the framework of the various initiatives or programmes, to avoid scattering resources and to maximise the impact.

**Horizon Europe Missions.** Respondents welcomed the new approach but underlined some issues in the implementation (e.g., delays, the complexity of the calls, and the need to diversify the stakeholders involved in the governance processes). Some stakeholders remarked on the need to include actors such as regions, local authorities and civil society to tackle such public policy challenges.

**Horizon Europe Partnerships.** Partnerships were seen as an effective means to increase coherence in the R&D activities of private and public actors. The new approach to partnerships was considered a major simplification of Horizon Europe. However, there are concerns about their implementation, due to the delays and the inadequate timing of initiatives designed to support the implementation of the partnerships. There is still unclarity about the role of research organisations and industrial partners – whereby the calls are open to anyone. Two respondents addressing specifically the Partnership on Clean Aviation reported that the process of setting it up was cumbersome and complex. The focus on large projects has implied that the number of participants has decreased compared to the previous Clean Sky 2 Programme.

**Technology Readiness Levels (TRL) coverage.** Respondents from academia and research institutions expressed the need to balance the TRL coverage to ensure that the Framework Programme continues supporting basic research below TRL 4 as well as applied research at medium TRL. A shift from Research and Innovation Actions to Innovation Actions with high TRL was pointed out. The need to fund replication in the industry and society in addition to technology development was mentioned by a company.

**Work programmes.** The feedback received concerns several aspects: from the process of co-creation (e.g., extending the time allowed for national representatives to consult national stakeholders) to the duration of the work programme (e.g., increasing it from two to three years) to the structure of the work programmes (e.g., including more information in the main body of the document instead of the Annex). It was also requested that the Commission publishes the draft of the work programmes to avoid the circulation of unofficial drafts among some interested parties.

As for the content of the work programmes, it was observed that often the topics are proposed in a single call rather than being repeated in different years, with implications on the breadth and sustainability of the impact. Some stakeholders asked to introduce calls dedicated to specific research topics (e.g., paediatric cancer, infertility and Medically Assisted Reproduction, Lyme disease, venous thromboembolism, AI-powered speech technology, heating and cooling technologies, assistive technologies, and others).

According to some stakeholders, the fragmentation of the budget into several topics means that often each call provides funding for only one or two projects. In this way, it is not possible to have cross-fertilisation between projects of the same call. Furthermore, the multiplication of instruments and work programmes, with various timeframes and deadlines and overlap on the covered topics, has been detrimental to adequate participation as it created competition between calls.

**Approach for topics/calls for proposal.** There are contrasting views on the opportunity to adopt a bottom-up (i.e., open to any idea or research topic as in the ERC or MSCA) or a top-down approach (i.e., allocating budget to predefined research topics). In the case of a top-down approach, it was observed that when the topic is too broad, the calls are heavily oversubscribed, and the quality of the proposals is lower. In addition, it was suggested to focus top-down efforts on key areas for the strategic autonomy of Europe.

One respondent questioned the choice of adopting a “portfolio approach”, selecting the proposals to be funded considering how they fit within the portfolio of the specific programme – specifically for the European Innovation Council.

## Horizon Europe Implementation

**Timing and communication on the calls for proposals.** Several stakeholders expressed their concerns about the short time frame between the publication of the call for proposals in the EC portal and the submission deadline, which creates difficulties for potential applicants. According to some contributions, communication about the calls’ opening should be improved to increase their visibility.

**Template for proposals and IT tool.** While the new template for proposals is considered more comprehensive than the one of Horizon 2020, the reduced maximum length of the proposals and the lack of flexibility among different parts are considered problematic, especially for big projects. The guides, documents and webinars to support proposal preparation are appreciated but, according to some contributions, they are published too late in the process and the webinars are often scheduled within a short time. Clarifications on specific aspects such as the “Do not significant harm” principle, the gender and open science aspects under the Excellence criterion are needed. Respondents reported frequent technical problems with the Funding and Tenders portal (e.g., difficulties in adding affiliated entities in the proposal, impossibility to change the order of partners in the list of participants).

**Using lump sums to fund collaborative research projects.** While simpler rules for financial reporting are appreciated, stakeholders from academia and research institutions nevertheless

raised concerns about this funding model since it has some drawbacks to collaboration within the consortia. In particular, it was mentioned that i) it creates risk-averse approaches in both the choice of partners and the envisaged deliverables and results, ii) it limits flexibility during the project implementation, iii) it creates a tendency for smaller work packages with as few involved partners as possible endangering collaboration and knowledge transfer; iv) it shifts significant administrative and financial planning effort from the project implementation phase to the proposal phase, with a possible deterrent effect on potential applicants, especially newcomers.

**Evaluation process.** According to some stakeholders, the evaluation process could be improved by asking the applicant to select keywords in order of priority, to ensure that the relevant expertise is included in the review panel. The quality of the Evaluation Summary Reports (ESRs) was criticised by some respondents, pointing to the need to adapt the evaluation assessment to the new proposal template (e.g., the reduced length implies that fewer details can be provided in the proposal). The implementation of the “Right to react” tool needs to be improved.

## Widening participation

**Participation from EU-13 countries.** The issue of lower participation from EU-13 countries was underlined. Mentioned barriers to their involvement include factors such as understaffed support offices, insufficient support in the project preparation phase, the need for experienced support staff and additional well-tailored funding, slow decision-making processes compared to the flexibility and short reaction time often required in projects, and the Programme’s focus on a few big actors instead of the wider ecosystem. The strengthened support from the NCPs for widening participation was appreciated.

**Lack of association agreement with the UK and Switzerland.** Several stakeholders, especially those based in Switzerland, pointed out the negative repercussions of excluding Switzerland and the UK from the Associated countries on the implementation of Horizon Europe.

**International collaboration.** Openness to international collaboration is seen as an important element of the Programme. The Africa initiative of Horizon Europe was mentioned as a good example that should also be replicated in other regions (e.g., Latin America, ASEAN).

Alignment with the EU priorities and complementarity with other initiatives

According to several respondents, the choice of the research topics in Horizon Europe is well aligned with the EU priorities and it contributes to the digital and green transition. Some suggestions on how to further increase the contribution of Horizon Europe to the twin transition were provided by stakeholders specialised in relevant fields (e.g., distinguishing between Carbon Capture and Storage (CCS) and Carbon Dioxide Removal (CDR) and tracking the support for the two fields).

Further synergies with the Euratom programme were encouraged by some respondents working on nuclear energy. As for the other EU programmes, some contributions suggested using the funding from other programmes (e.g., the European Regional Development Fund) to support the Missions, since they tackle broad societal challenges.

### *Suggestions for the evaluation*

It was suggested that the interim evaluation of Horizon Europe should explore the following areas:

- the effects of changing the Programme' structure (merging KETs and societal challenges)
- the distribution of single beneficiary instruments and multi-beneficiaries (i.e., collaborative projects)
- the coverage of different TRLs and the balance between funding of basic science and innovation
- the impact of the new instruments such as missions and the new widening measures
- the impact of the new capping of budgets on partnerships
- the effects of using lump-sums
- the access, participation, contribution and added value of associated countries and non-associated third countries to the various parts of Horizon Europe
- the consequences of changing the list of associated and non-associated countries compared to Horizon 2020, particularly in terms of opportunities and collaborations
- the efforts towards simplification and streamlining of instruments
- the impact of the funded thematic research, considering the introduction of missions in addition to challenges
- first effects and impact of the introduction of Gender Equality Plans.

### **Public consultation: scope and objectives**

In line with the Better Regulation guidelines and toolbox<sup>191</sup>, the public consultation on Horizon Europe forms part of a combined consultation and evaluation exercise.<sup>192</sup> It aimed to explore stakeholders' views regarding the key aspects of the past and the present as well as the future of the EU Framework Programme for Research and Innovation, notably for the ex-post evaluation of Horizon 2020 (2014-2020), the interim evaluation of Horizon Europe (2021-2023) as well as to receive inputs from stakeholders to be used for the definition of strategic orientations for the Horizon Europe Strategic Plan (2025-2027).

The reason for conducting a joint consultation is the relatively short time span between the legal obligation for the Horizon 2020 ex-post evaluation (published on 29/01/2024) and the legal obligation for the Horizon Europe interim evaluation. Additionally, another reason for conducting a joint consultation instead of reaching out to the broad public on three separate instances was to counter stakeholder fatigue, also bearing in mind that all three dimensions concern the same group of stakeholders. Nevertheless, it is important to note that this public consultation was geared towards anyone with an interest in the EU R&I Framework programmes, not only towards beneficiaries and the main stakeholder groups delineated in the section above but also unsuccessful applicants as well as independent experts.

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<sup>191</sup> Better Regulation Toolbox, notably Tool #52.

<sup>192</sup> Better Regulation Toolbox, Tool #50, p. 434.



The combined public consultation was accessible in English, French and German on the Have Your Say web portal from 01/12/23 until 23/03/23. Respondents had the possibility to submit their replies in any official EU language resulting in 2 788 responses and 265 position papers in total. For the section on Horizon Europe, 1 663 responses were submitted along with 136 position papers. The factual summary report, along with all contributions to the three dimensions covered in this public consultation as well as position papers are accessible on the [Have your Say portal](#). Findings in this consultation did not only feed into the analysis presented on the following pages as well as highlighted in the respective sections in the main Staff Working Document but also form basis for the development of the 10<sup>th</sup> Framework Programme for Research and Innovation.

### ***Methodology used for the analysis of the responses received through the public consultation***

#### *Quantitative analysis*

Quantitative analysis was conducted by means of descriptive statistics, differentiating and comparing responses of different groups of respondents. Correct representation and interpretation of results are fundamental to drawing coherent conclusions which is why the number of respondents has been shown along with percentages. Linkages between answers and respondents' characteristics such as participation in the programme, country affiliation and type of respondent (e.g. Member State and business organisation representatives, researchers). When evident, correlations between answers given in closed questions have been explored. The summary statistics were bundled in .xml format which allowed for swift cross-comparison among the various dimensions covered in the public consultation survey.

#### *Qualitative analysis*

Key messages were extracted from qualitative contributions, primarily position papers and open questions present in the public consultation survey. Same holds true for the analysis of the feedback contributions received for the call for evidence. Contributions were clustered by topics and specific aspects raised in both position papers and open questions by means of using Excel, presenting findings in a contribution matrix.

#### *Content moderation according to Better Regulation Tool #54<sup>193</sup>*

In view of content moderation, only three contributions were unpublished: all three were taken into consideration content-wise, however in two cases GDPR-related concerns led to unpublishing on the Have your say portal. Another respondent reached out to the support team of the public consultation via the indicated functional mailbox asking to unpublish the contribution as a wrong attachment was uploaded as a position paper – for the analysis, the newer position paper was taken into account.

#### *Identification of campaigns<sup>194</sup>*

Responses have been reviewed manually to identify campaigns and potential duplicates among submitted position papers as well as open questions. Overall, 24 campaigns were identified

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<sup>193</sup> Better Regulation Tool #54, p. 478.

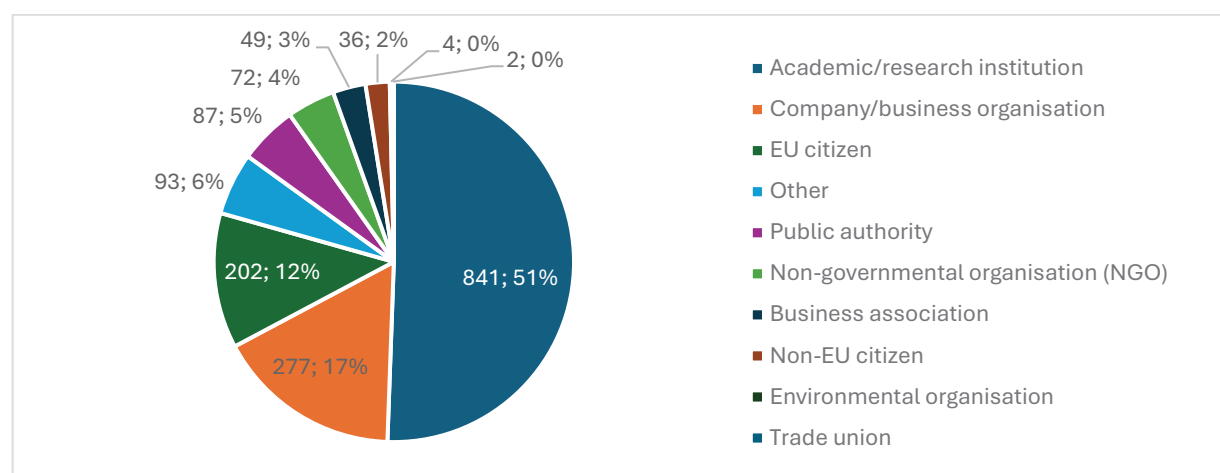
<sup>194</sup> Better Regulation Tool #54, p. 476.

which contained between 2 and 9 identical contributions each. The campaigns account for 88 (or 5% of) responses.<sup>195</sup>

### *Public consultation & Horizon Europe Public Event: Participants*

In total, 1 663 respondents chose to complete the section of the consultation on Horizon Europe programme. **Contributions were received from a wide range of actors.** 51% (841) of the respondents were part of academic or research institutions, 17% (277) were companies or business organisations, and 14% (238) were citizens (EU and not EU). The remaining respondents (18%; 307) included different types of stakeholders: 87 were **public authorities**, 72 were **NGOs**, 49 were **business associations**, 4 were **environmental organisations** and 2 were **trade unions**. 93 respondents selected the category “other”<sup>196</sup>. Among the 87 (5%) public authorities that contributed to the section on Horizon Europe, 35 worked at the national level, 28 at the international level, 15 at the regional level and 9 at the local level<sup>197</sup>.

Figure 31: I am giving my contribution as... (N=1 663)



59% (988) of respondents provided personal views, while 38% (633) contributed as a member of an institution or organisation and 3% (42) did not provide this information.<sup>198</sup> More than half (61%; 872) of the organisations that contributed were large, whereas 16% (226) were medium size, 12% (173) were micro and 11% (154) were small<sup>199</sup>.

<sup>195</sup> For additional information, please consult the factual summary report for the interim evaluation of Horizon Europe on [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13460-Horizon-Europe-interim-evaluation/public-consultation\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/13460-Horizon-Europe-interim-evaluation/public-consultation_en)

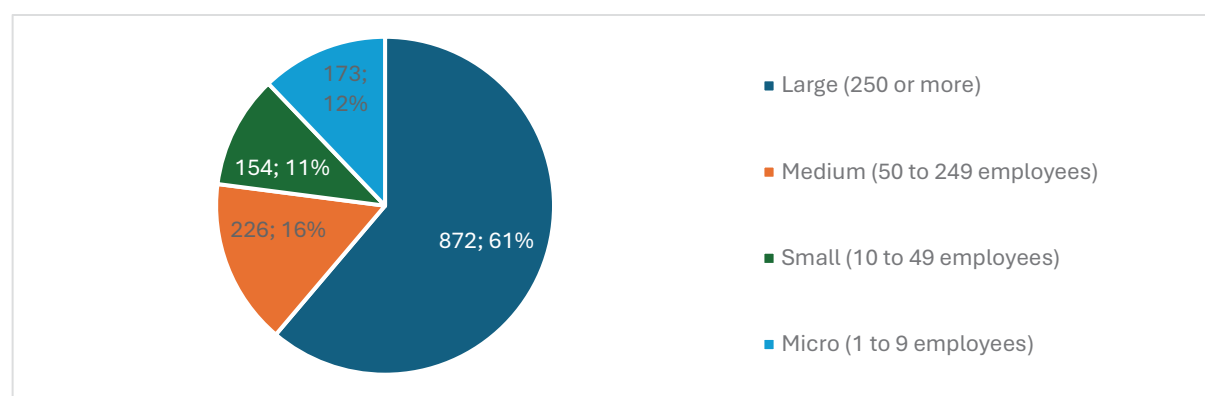
<sup>196</sup> Question: “I am giving my contribution as...”

<sup>197</sup> Question: “Scope”.

<sup>198</sup> Question: “Are you providing your personal views or the views of an institution/organisation?” – not obligatory to be answered

<sup>199</sup> Question: “Organisation size”.

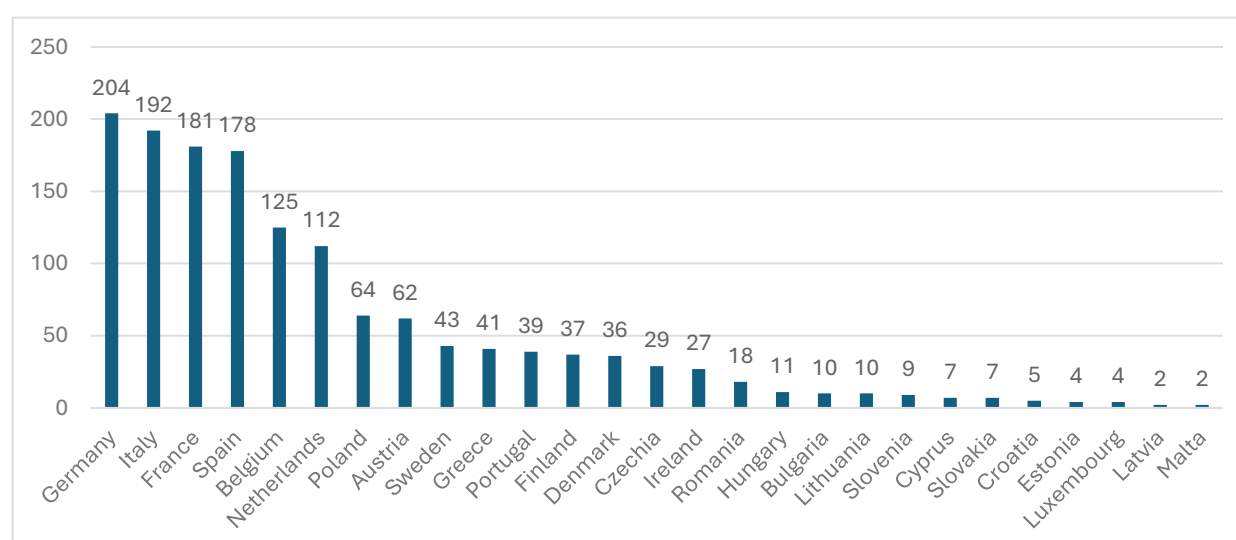
Figure 32: What is the size of your organisation? (N=1 425)



### Geographical coverage

The consultation gathered responses from **61 countries, including all 27 EU Member States**. 88% (1 459) came from EU27 countries, 5% (87) from the Horizon Europe Associated Countries<sup>200</sup>, and 7% (117) from Third Countries<sup>201</sup>. The countries with the largest number of respondents were Germany (204), Italy (192), France (181) and Spain (178). Looking at non-EU countries, the largest number of contributions came from the United Kingdom (43), Switzerland (42), Norway (37) and Türkiye (26).

Figure 33: What is your country of origin? – EU 27 Member States (N=1 459)



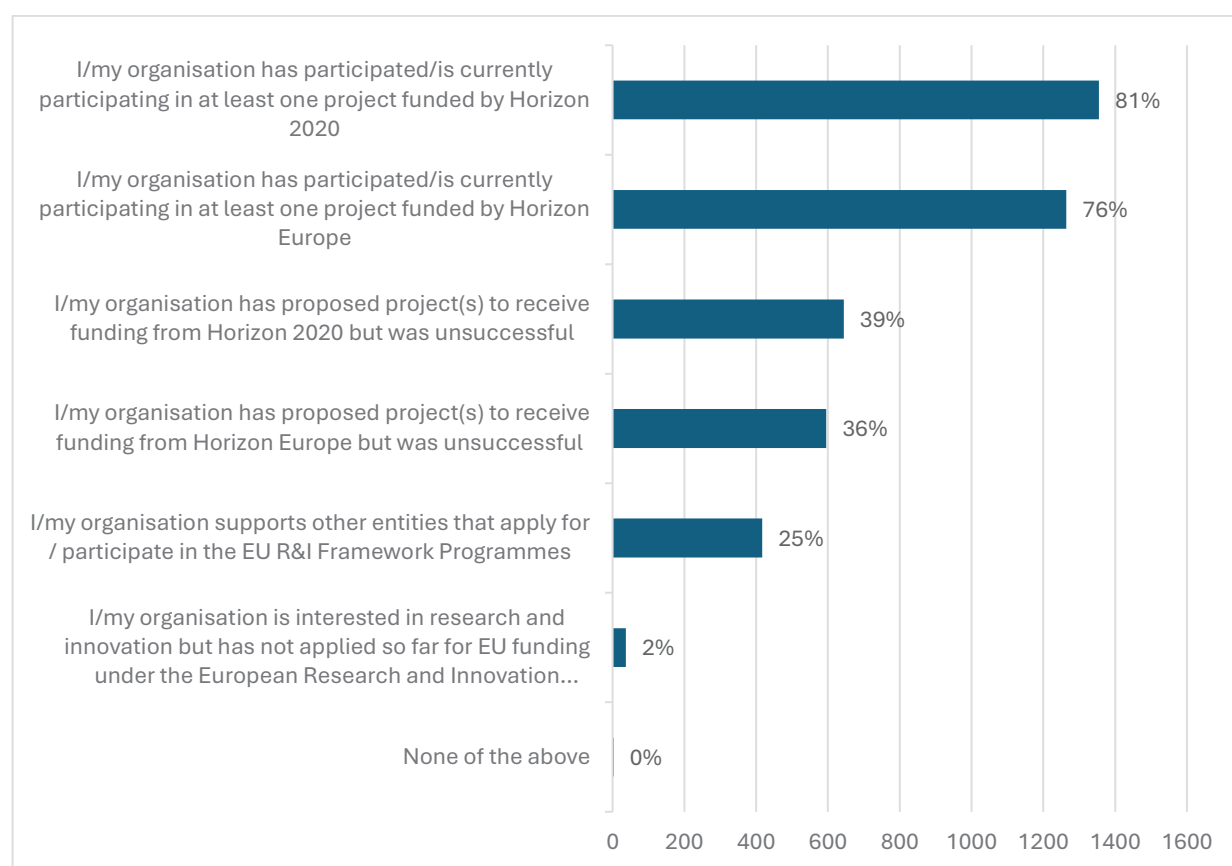
### Experience with the framework programmes

<sup>200</sup> Horizon Europe Associated Countries include Norway (37), Türkiye (26), Israel (6), Ukraine (6), Bosnia and Herzegovina (2), Georgia (2), North Macedonia (2), Albania (1), Serbia (1), Iceland (1), Moldova (1), Faroe Islands (1), and Tunisia (1). No responses were received from Armenia, Kosovo and Montenegro. List of Horizon Europe Associated Countries and countries with provisional arrangements: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation\\_horizon-euratom\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_en.pdf)

<sup>201</sup> United Kingdom (43), Switzerland (42), United States (5), Brazil (3), China (3), Colombia (3), India (2), Canada (2), Venezuela (2), Argentina (1), El Salvador (1), Philippines (1), New Zealand (1), Mexico (1), Ethiopia (1), Australia (1), Azerbaijan (1), Bangladesh (1), Japan (1), Jordan (1), Uruguay (1), South Africa (1).

The respondents were asked to select one or more options describing their experience with Horizon 2020 and Horizon Europe.<sup>202</sup> 81% (1 355) of all the respondents that contributed to the part of the consultation on the evaluation of Horizon Europe had **participated in Horizon 2020**<sup>203</sup> and 76% (1 264) of them were **Horizon Europe beneficiaries**<sup>204</sup>. 36% (595) of respondents stated that they “proposed project(s) to receive funding from Horizon Europe but were **unsuccessful**”. However, considering that the same respondent could select multiple options, 7% (109) of respondents applied for Horizon Europe funding and were never successful<sup>205</sup>. Respondents also included **organisations supporting other entities** that apply for or participate in the EU R&I framework programmes (25%; 417) and **organisations that have never applied** for funding but are interested in R&I (2%; 37).

Figure 34: Please select the option(s) that best describe(s) your experience with the European Research and Innovation programmes (N=1 663; multiple answers possible)



<sup>202</sup> “Please select the option(s) that best describe(s) your experience with the European Research and Innovation programmes”. The question allowed multiple answers. Therefore, the same organisation could be, for instance, a beneficiary of both Horizon 2020 and Horizon Europe, or an unsuccessful applicant of Horizon 2020 but a beneficiary of Horizon Europe, or both an unsuccessful applicant and a beneficiary of Horizon 2020, if it submitted multiple proposals with different outcomes.

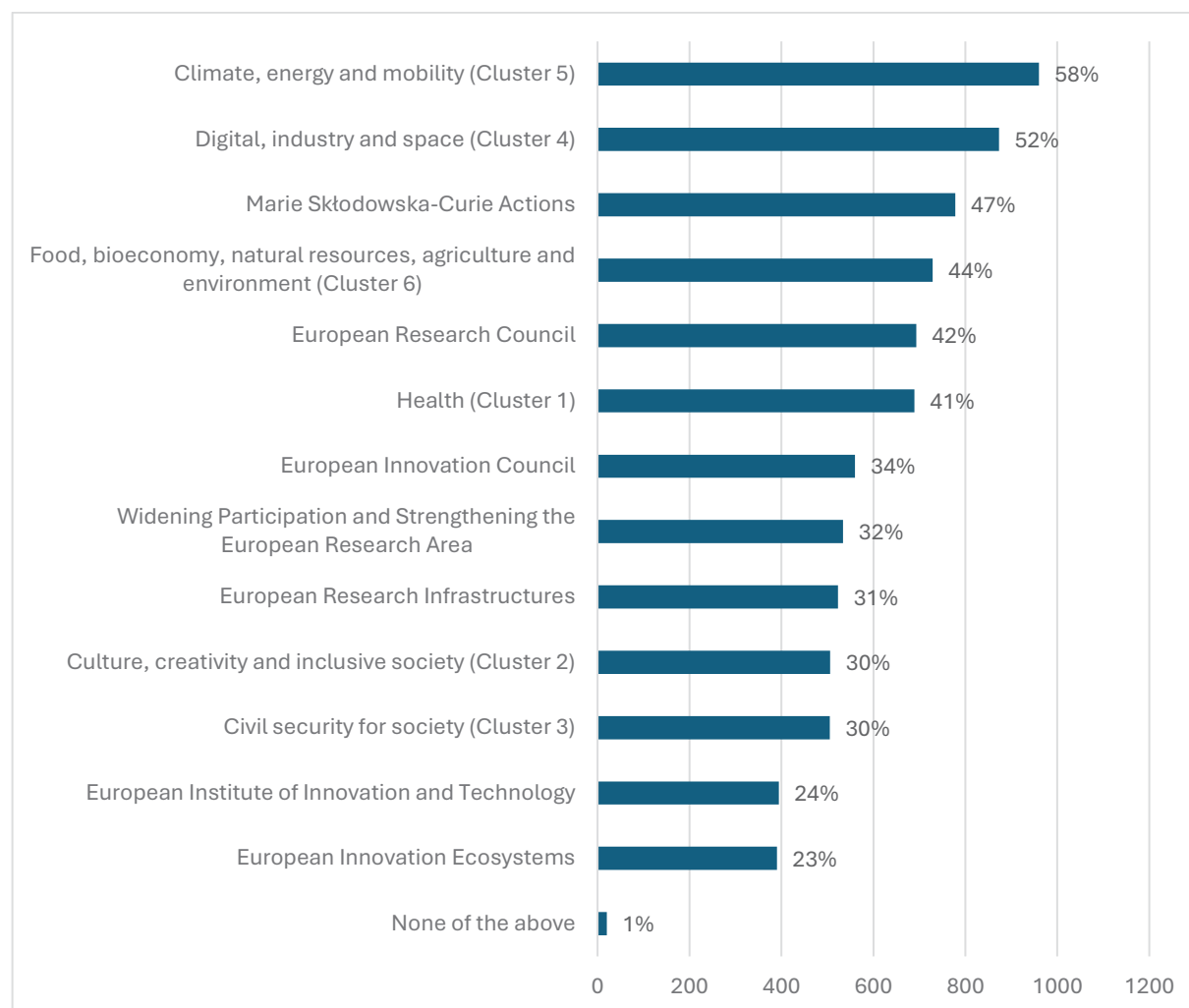
<sup>203</sup> They selected the response option “I/my organisation has participated/is currently participating in at least one project funded by Horizon 2020 (2014 – 2020)”.

<sup>204</sup> They selected the response option “I/my organisation has participated/is currently participating in at least one project funded by Horizon Europe (2021 – 2027)”.

<sup>205</sup> They selected the response option “I/my organisation has proposed project(s) to receive funding from Horizon Europe but was unsuccessful” alone or with other response options, but they did not select “I/my organisation has participated/is currently participating in at least one project funded by Europe”.

The respondents were active or interested in all the parts of Horizon Europe<sup>206</sup>. The highest number of respondents were interested in **cluster 5** “Climate, energy and mobility” (58%; 960), **cluster 4** “Digital, industry and space” (52%; 873), **Marie Skłodowska-Curie Actions** (47%; 778), **cluster 6** “Food, bioeconomy, natural resources, agriculture and environment” (44%; 729), and the **European Research Council** (42%; 693)

Figure 35: In which of the following areas of Horizon Europe are you or your organisation mainly active / interested in? (N=1 663; multiple answers possible)



## Overview of position papers

**136** position papers uploaded in response to this consultation included content relevant for the evaluation of Horizon Europe. Among the 136 position papers, 59 had been sent in by academic or research institutions, 16 by non-governmental organisations, 16 by public authorities, 15 by business associations, 5 by companies or business organisations, one by a trade union, one by an EU citizen and 23 by respondents who did not identify with any of the previous categories of stakeholders. The largest number of position papers came from Belgium (31), France (19), The Netherlands (15) and Germany (11). The high number of position papers from Belgium is due to the presence of many organizations with pan-European or EU scope that maintain an office in Brussels.

<sup>206</sup> Question: In which of the following areas of Horizon Europe are you or your organisation mainly active / interested in? Please select all that apply.



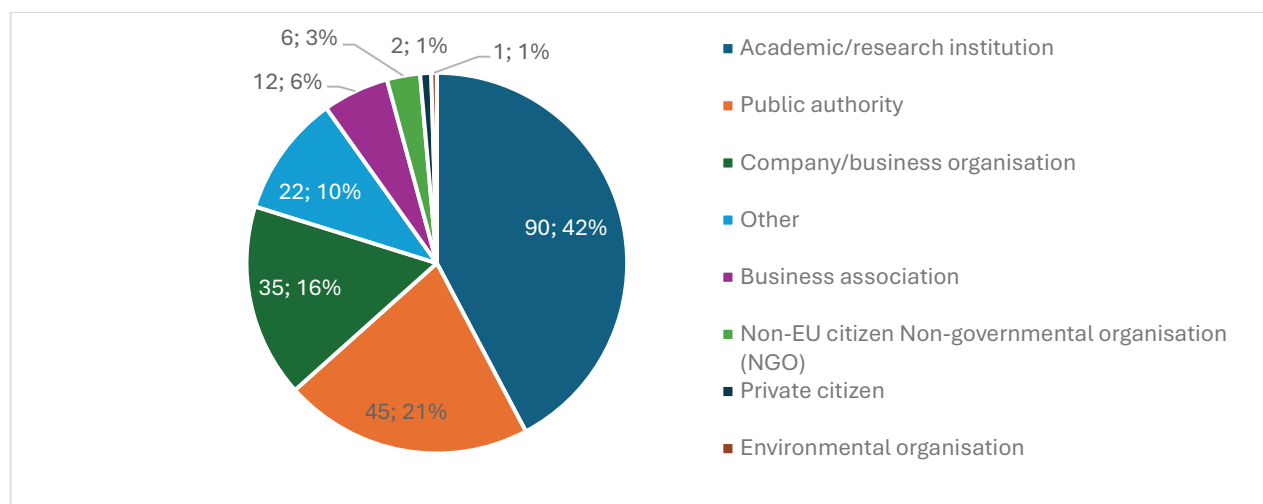
## Public Event on Horizon Europe

An **online public event** was held on 29 June 2023 to complement the public consultation process and gather more comprehensive feedback on specific topics of Horizon Europe. The event focused on key themes that emerged prominently in the survey results, namely:

- Proposal preparation and project implementation in Horizon Europe
- The balance between low and high TRLs across Horizon Europe
- The novelties of Horizon Europe (i.e., the three-pillar structure, the European Innovation Council, the new approach to European Partnerships, the EU Missions).

In total, **217 stakeholders** from **206 different organisations** participated in the event<sup>207</sup>. Participants encompassed different stakeholder categories, with 42% of them representing academic or research organisations, 21% public authorities and 16% companies or business organisations.

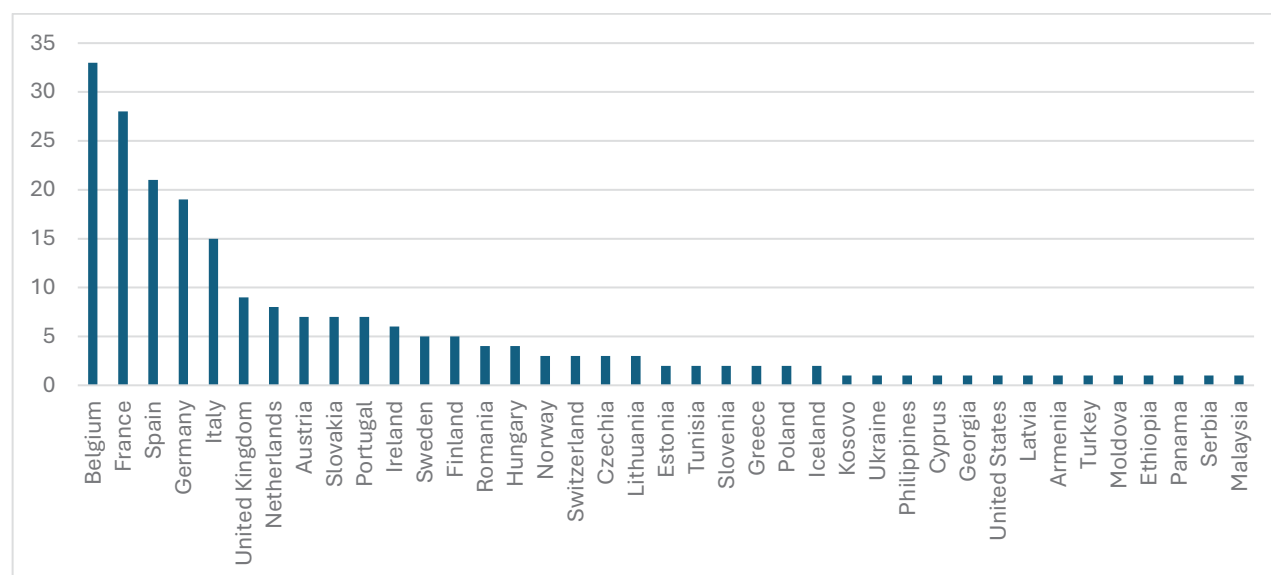
Figure 36: Types of stakeholders participating in the public event (Number of participants for which the information is available: 213)



Participants came from **39 different countries**. The highest share (15%) came from Belgium, as many pan-European organisations are registered there, followed by France (13%) and Spain (19%).

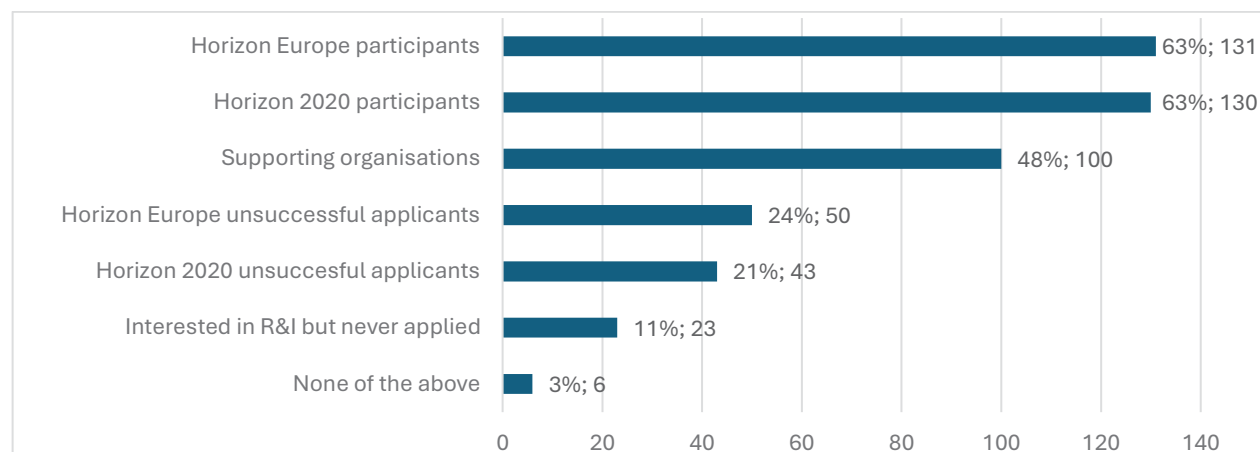
<sup>207</sup> In addition, there were 9 people from the European Commission and 9 contractors present. The total of participants connected to the event was 235. The event was broadly promoted, and registrations were accepted for 297 participants.

Figure 37: Country of origin of stakeholders participating in the public event (Number of participants for which the information is available: 216)



More than 60% of the stakeholders participating in the event were either **Horizon 2020** or **Horizon Europe participants** (or both), whereas 49% of them were organisations supporting other entities that apply for / participate in the EU Framework Programmes.

Figure 38: Experience with the EU Framework Programmes of stakeholders participating in the public event (Number of participants for which the information is available: 208. Multiple options possible)



## Public consultation & Horizon Europe Public Event: Results

### The benefits of participating in Horizon Europe

The majority of respondents (74%; 1 184) agreed that participating in Horizon Europe “improved cooperation with partners from other countries (within the EU and beyond)”, 39% (618) agreed that Horizon Europe “improved excellence in research and innovation” compared to other programmes available in EU Member States or Associated Countries, and 34% (544) agreed that Horizon Europe brought the “possibility to finance projects which otherwise could not be supported at national and/or regional level”. Less than 1% (0.6%; 9) of respondents stated that there was “no additional benefit” in participating in Horizon Europe compared to other national and/or regional R&I programmes.

The analysis by country group shows that, although the ranking of response options is aligned, certain benefits are considered particularly relevant for some country groups:

- 76.8% of respondents from Third Countries and 78.1% of respondents from EU13 selected “improved cooperation with partners from other countries” compared to 73.4% of respondents from EU14 and 73.2% from Associated Countries.
- 50% of respondents from Third Countries, 49.6% of respondents from Associated Countries and 49.4% of respondents from EU13 selected “improved excellence in research and innovation” compared to 35.4% of respondents from EU14.
- 35.2% of respondents from EU14 and 35% from Associated Countries selected “possibility to finance projects which otherwise could not be supported at national and/or regional level” compared to 28.1% of respondents from EU13 and 27.8% from Third Countries.
- 37.5% of respondents from Third Countries and 35.4% from EU13 selected “improved international visibility” compared to 31.9% of respondents from EU14 and 28.5% from Associated Countries.
- 28.5% of respondents from EU14 selected “strengthened critical mass to address pan-European challenges” compared to 22.8% of respondents from Associated Countries, 19.4% from Third Countries and 14.6% from EU13.

Table 20: According to you, what are the main benefits of participating in Horizon Europe compared to national and/or regional R&I programmes in EU Member States or Associated countries? Select maximum 3 answers (EU14 N= 1 223; EU13 N= 178; EU Associated Countries N=83; Third countries N=112)

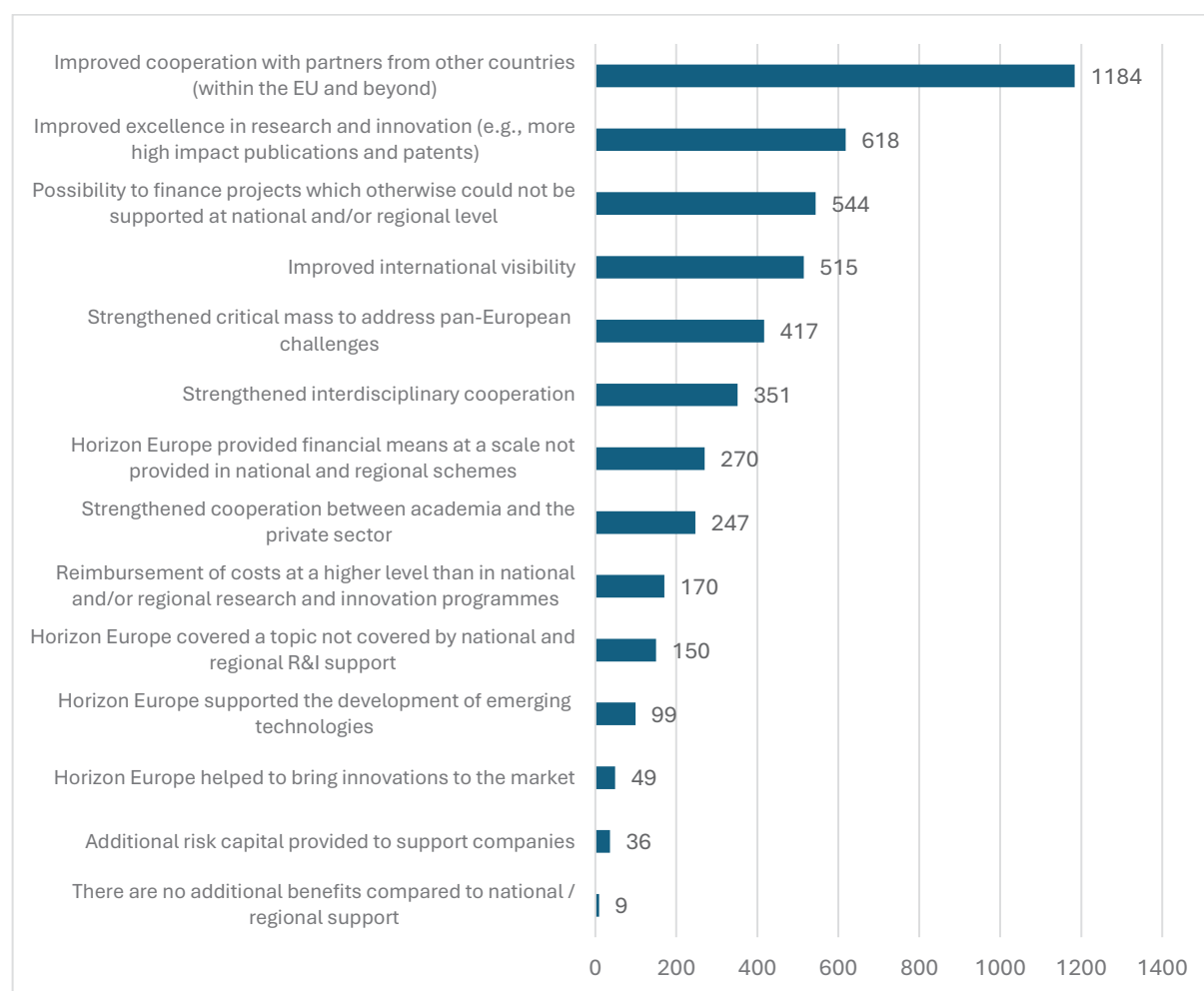
| RESPONSE OPTION  | EU14  | EU13  | EU ASSOCIATED COUNTRIES | THIRD COUNTRIES |
|--|-------|-------|-------------------------|-----------------|
| Improved cooperation with partners from other countries (within the EU and beyond)                           | 73.4% | 78.1% | 73.5%                   | 76.8%           |
| Improved excellence in research and innovation (e.g., more high impact publications and patents)             | 35.4% | 49.4% | 47.0%                   | 46.4%           |
| Possibility to finance projects which otherwise could not be supported at national and/or regional level     | 35.2% | 28.1% | 33.7%                   | 26.8%           |
| Improved international visibility  | 31.9% | 35.4% | 21.7%                   | 15.2%           |
| Strengthened critical mass to address pan-European challenges  | 28.5% | 14.6% | 13.3%                   | 12.5%           |
| Strengthened interdisciplinary cooperation   | 21.8% | 20.8% | 18.1%                   | 22.3%           |
| Horizon Europe provided financial means at a scale not provided in national and regional schemes             | 17.7% | 15.2% | 3.6%                    | 3.6%            |
| Strengthened cooperation between academia and the private sector   | 15.5% | 15.2% | 31.3%                   | 24.1%           |
| Reimbursement of costs at a higher level than in national and/or regional research and innovation programmes | 11.8% | 11.2% | 4.8%                    | 0.9%            |
| Horizon Europe covered a topic not covered by national and regional R&I support                              | 8.8%  | 11.8% | 12.0%                   | 7.1%            |
| Horizon Europe supported the development of emerging technologies  | 5.9%  | 5.6%  | 20.5%                   | 6.3%            |
| Horizon Europe helped to bring innovations to the market   | 2.9%  | 2.8%  | 9.6%                    | 7.1%            |
| Additional risk capital provided to support companies  | 1.8%  | 3.9%  | 4.8%                    | 3.6%            |
| There are no additional benefits compared to national / regional support                                     | 0.7%  | 0.0%  | 0.0%                    | 0.0%            |

The position papers highlighted similar benefits<sup>208</sup>. The most recurrent benefit mentioned in the position papers by different stakeholders (from academia, research organisations, companies and business associations) was the possibility to collaborate with partners across different sectors and involving different actors such as researchers, non-academic stakeholders and policy makers. Another aspect underlined by some position papers submitted by

<sup>208</sup> 18 position papers included comments on the benefits of Horizon Europe.

respondents from industry was that Horizon Europe allowed RDI actors to undertake projects to address global challenges such as climate change and energy security, which require long-lasting and coordinated efforts. One business association mentioned the increased visibility of projects funded by Horizon Europe compared to those nationally funded, and one academic actor remarked that Horizon Europe funding helped to attract international talent.

Figure 39: According to you, what are the main benefits of participating in Horizon Europe compared to national and/or regional R&I programmes in EU Member States or Associated countries? Select maximum 3 answers (N=1 596)



### The reasons preventing participation in Horizon Europe

The main reported “reasons that may have prevented potential beneficiaries from participating in Horizon Europe” are the programme’s low success rates (for 58% of respondents; 916), an application process perceived as cumbersome (for 42% of respondents; 665), the inadequate knowledge of potential applicants of the EU research and innovation framework programme (for 41% of respondents; 644) and the limited financial and human resources available to prepare a proposal (for 40% of respondents; 630)<sup>209</sup>.

<sup>209</sup> The first two reasons are relatively more important for unsuccessful than for successful applicants, whereas the third and fourth reasons are more important for successful than for unsuccessful applicants.



Figure 40: In your view, what are the main reasons that may have prevented potential beneficiaries from participating in Horizon Europe? Select maximum 3 answers. (N=1 585)

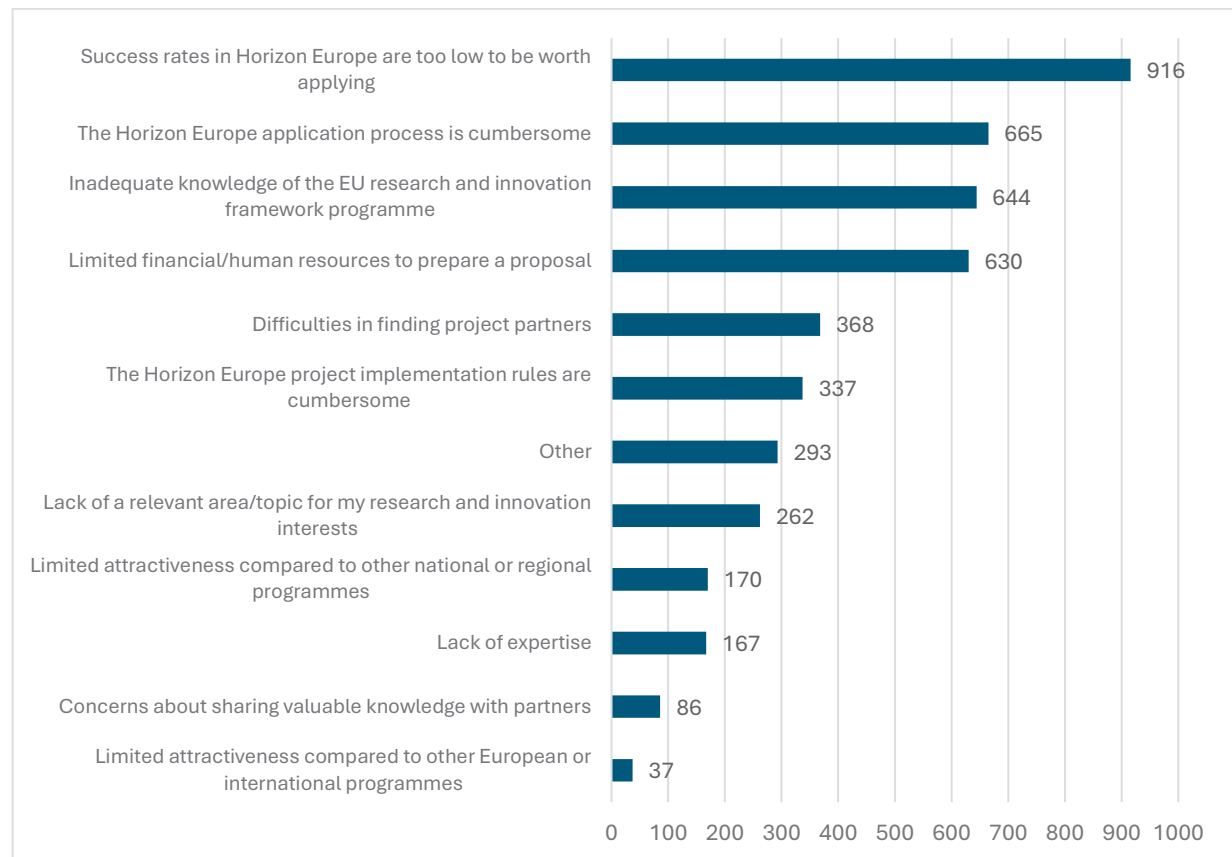
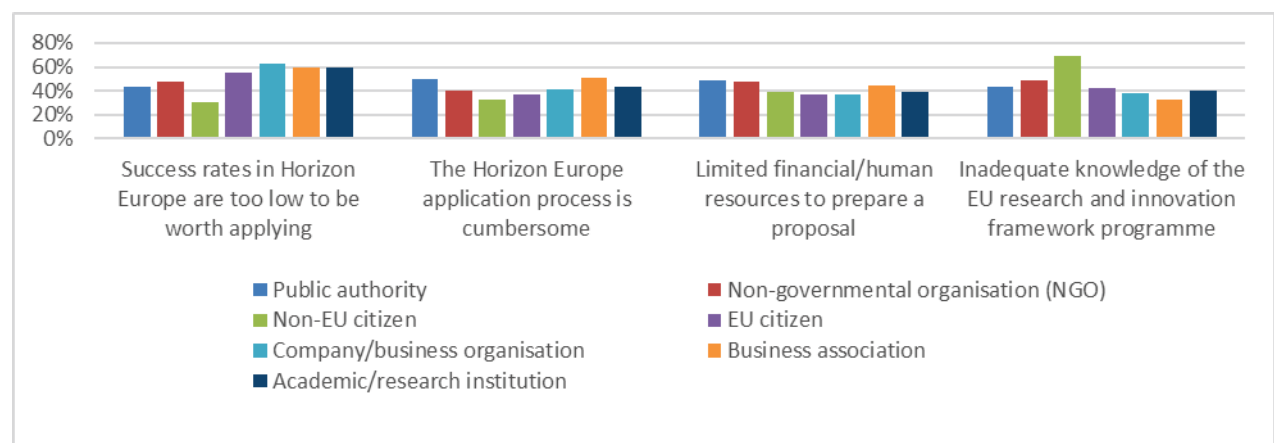


Figure 41: Stakeholder breakdown – top four main reasons preventing participation in Horizon Europe (up to three responses allowed, environmental organisations and trade unions not represented due to low response rate (2 or fewer))



The low success rates, the “limited financial / human resources to prepare a proposal” and the “difficulties in finding project partners” are relatively more important reasons for respondents from EU13 countries than for those from EU14 countries. By contrast, the cumbersome application process and project implementation rules are relatively more important for respondents from EU14 countries.

Table 21: In your view, what are the main reasons that may have prevented potential beneficiaries from participating in Horizon Europe? Select maximum 3 answers. (Successful applicants N= 1 225; Unsuccessful applicants N= 106)

| RESPONSE OPTION   | HORIZON SUCCESSFUL APPLICANTS | EUROPE UNSUCCESSFUL APPLICANTS |
|---|-------------------------------|--------------------------------|
| Success rates in Horizon Europe are too low to be worth applying              | 58.7%                         | 68.9%                          |
| Limited financial/human resources to prepare a proposal                       | 40.7%                         | 36.8%                          |
| Inadequate knowledge of the EU research and innovation framework programme    | 40.5%                         | 32.1%                          |
| The Horizon Europe application process is cumbersome                          | 40.2%                         | 48.1%                          |
| Difficulties in finding project partners                                      | 23.8%                         | 17.9%                          |
| The Horizon Europe project implementation rules are cumbersome                | 21.0%                         | 17.0%                          |
| Other   | 18.0%                         | 17.0%                          |
| Lack of a relevant area/topic for my research and innovation interests        | 16.7%                         | 23.6%                          |
| Limited attractiveness compared to other national or regional programmes      | 11.5%                         | 7.5%                           |
| Lack of expertise   | 10.8%                         | 9.4%                           |
| Concerns about sharing valuable knowledge with partners                       | 5.6%                          | 3.8%                           |
| Limited attractiveness compared to other European or international programmes | 2.1%                          | 2.8%                           |

Table 22: In your view, what are the main reasons that may have prevented potential beneficiaries from participating in Horizon Europe? Select maximum 3 answers. (EU14 N= 1 213; EU13 N= 178; EU Associated Countries N= 83; Third Countries N= 111)

| RESPONSE OPTION  | EU14  | EU13  | EU ASSOCIATED COUNTRIES | THIRD COUNTRIES |
|--|-------|-------|-------------------------|-----------------|
| Success rates in Horizon Europe are too low to be worth applying | 60.0% | 62.9% | 33.7%                   | 29.7%           |
| The Horizon Europe application process is cumbersome             | 43.9% | 28.7% | 42.2%                   | 24.3%           |
| Limited financial/human resources to prepare a proposal          | 39.9% | 46.6% | 36.1%                   | 26.1%           |

|   |       |       |       |       |
|---|-------|-------|-------|-------|
| Inadequate knowledge of the EU research and innovation framework programme    | 39.4% | 34.8% | 55.4% | 52.3% |
| The Horizon Europe project implementation rules are cumbersome                | 22.6% | 10.1% | 26.5% | 6.3%  |
| Difficulties in finding project partners                                      | 20.8% | 34.3% | 36.1% | 18.9% |
| Other   | 17.9% | 19.1% | 14.5% | 19.8% |
| Lack of a relevant area/topic for my research and innovation interests        | 17.1% | 16.9% | 13.3% | 10.8% |
| Limited attractiveness compared to other national or regional programmes      | 10.6% | 13.5% | 9.6%  | 9.0%  |
| Lack of expertise   | 10.1% | 15.2% | 14.5% | 5.4%  |
| Concerns about sharing valuable knowledge with partners                       | 5.7%  | 3.9%  | 6.0%  | 4.5%  |
| Limited attractiveness compared to other European or international programmes | 2.2%  | 3.4%  | 1.2%  | 2.7%  |

The deterring reasons mentioned by respondents in the position papers<sup>210</sup> are:

- The low success rates compared to the effort needed to prepare the proposal – this issue was underlined by academic actors, research organisations, but also companies and business associations.
- The requirement to create large consortia, which creates administrative burden, especially for the project coordinator, and difficulties in project management (e.g., for projects on research infrastructures).
- The administrative procedures for application, the language used in the calls for proposals and the documents for the application process are considered too complex for newcomers and SMEs and require expert help (e.g., from consultants).
- According to a business association at European level, SMEs encounter difficulties in finding partners.
- Some universities and associations of universities maintained that the programme was too complex, with different actions and instruments addressing the same objectives. It is difficult for small organisations with limited experience and resources and for newcomers to navigate the landscape of opportunities available and to identify the relevant ones for them. Against this background, the EU Missions and the European Partnerships are said to create additional layers of complexity.

Some academic stakeholders participating in the event claimed that joining consortia and partnerships is not always easy, since sometimes they are perceived as “closed clubs”. This barrier is stronger for newcomers or small local/regional organizations with low experience in Horizon Europe. In addition, some research organisations maintained that the Work Programmes’ structure has become more complex over time, and it is difficult for researchers to navigate the different opportunities, especially for those not familiar with EU funding. According to them, this aspect may prevent participation from actors without the necessary administrative support (typically SMEs).

### Novelties in Horizon Europe

More than half of respondents maintained that the following “changes, introduced in Horizon Europe, contribute **somewhat or to a great extent** to strengthening the impact of European research and innovation”:

- Definition of the future R&I priorities through a co-creation process with stakeholders (76%; 1 200)
- Implementation of an open science policy (73%; 1 147)
- Development of several multi-annual Strategic Plans (71%; 1 106)<sup>211</sup>
- Creation of a pillar dedicated to innovation, including the European Innovation Council (64%; 997)
- Introduction of the impact logic in the formulation of topics (61%; 958)
- Creation of a pillar grouping societal and industrial issues (54%; 849)
- New approach to Partnerships (co-programmed, co-funded and institutionalised) (53%; 825)
- Creation of “EU Missions” (52%; 813)

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<sup>210</sup> 17 position papers included comments on the barriers to participation.

<sup>211</sup> Associations of research and academic actors at EU and national level observed in their position papers that the Strategic Plans improve the long-term planning process and the predictability for applicants, and (improve and?) demonstrate the alignment of Horizon Europe with key global challenges.

Some position papers from research institutions addressed the three-pillar structure of Horizon Europe positively, as it was seen in continuation with Horizon 2020. Likewise, according to the participants in the event the three Pillars' structure is working well. However, stakeholders from academia, research organisations as well as business support organisations, observed a gap between the research funded in Pillar I and Pillar II and the actions funded in Pillar III, since the first two Pillars fund collaborative research whereas Pillar III focuses on actions carried out by single beneficiaries. Therefore, the research projects funded under Pillar II often achieve a medium (5-6) Technology Readiness Level but struggle to scale up. In this view, some participants from research organisations regretted the lack of support for small collaborative projects under Pillar III since the Fast Track to Innovation had been discontinued. They called for enlarging the Transition grant scheme (which currently bridges ERC to EIC) to also cover Pillar II. A participant from a company supporting researchers and universities participating in Horizon Europe expressed appreciation for the fact that the Pillar II has brought together industrial and societal challenges as the two are interlinked.

The event participants assessed positively the creation of Pillar III, dedicated to innovation, but according to some stakeholders (both from universities and business support organisations) it is unclear what the medium and long-term objectives of the European Innovation Ecosystems (EIE) programme are. This lack of clarity makes the participation more difficult for stakeholders.

Figure 42: In your view, to what extent do the following changes, introduced in Horizon Europe, contribute to strengthening the impact of European research and innovation?

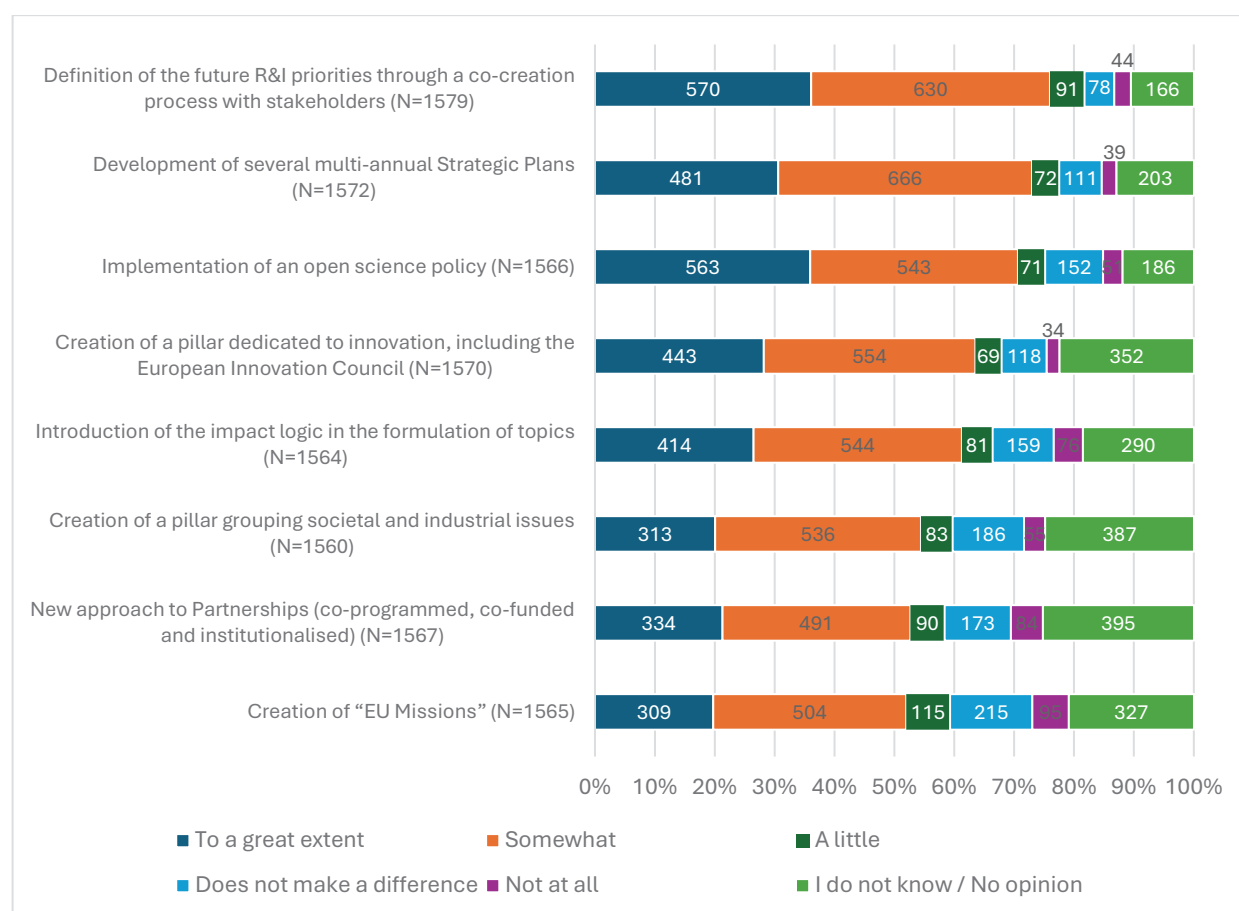




Figure 43: Stakeholder breakdown – definition of future R&I priorities through a co-creation process with stakeholders (N = 1579)

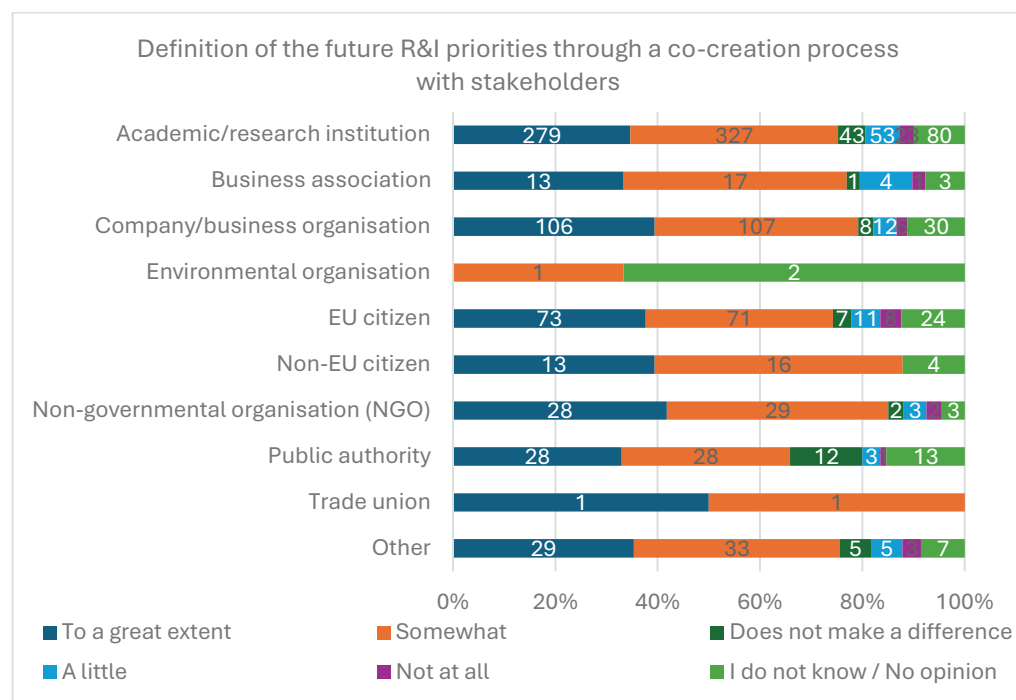


Figure 44: Stakeholder breakdown – Development of several multi-annual Strategic Plans (N=1572)

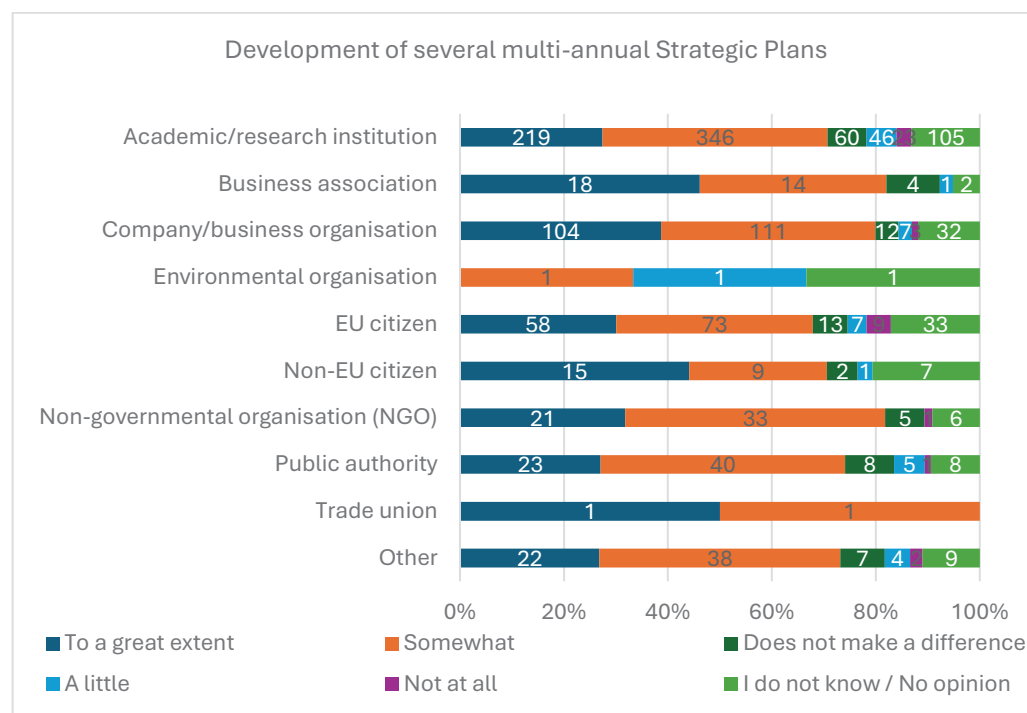
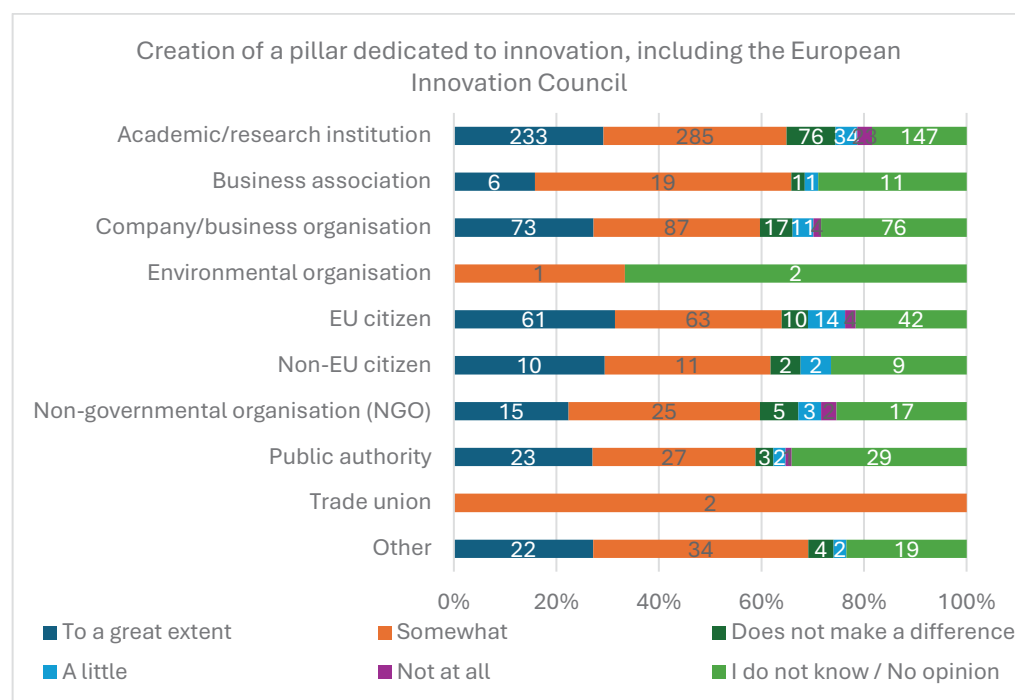


Figure 45: Stakeholder breakdown – Creation of a pillar dedicated to innovation, including the European innovation Council (N=1570)



#### Box 4: Overview of the comments on the European Innovation Council

27 position papers included comments on the European Innovation Council. Whilst several stakeholders appreciate the creation of the European Innovation Council, they pointed out some implementation issues, concerning:

- The insufficient flexibility of the administrative processes.
- The limited scope of the EIC Transition (accepting proposals only from the ERC PoC Pathfinder and FET).
- The application and evaluation process.
- The low success rates.
- The harmonisation of the IP provisions with the rest of Horizon Europe and with the Commission Recommendation on intellectual property.<sup>212</sup>
- Similarly, the event participants deemed the EIC as a valuable tool that addresses all stages of innovation. The specific procedures for proposals selection under the different EIC components and its general structure were considered appropriate. However, it was observed that during the first years of Horizon Europe the EIC had major governance issues, particularly in the Accelerator component, since the work of the newly established EIC Fund was not smooth enough and there were delays in the selection of beneficiaries. In addition:
  - For several participants, the Accelerator component excessively focused on deep-tech instead of on disruptive and breakthrough innovation in general, missing the opportunity

<sup>212</sup> 2008/416/EC, Commission Recommendation on the management of intellectual property in knowledge transfer activities and Code of Practice for universities and other public research organisations.

of funding disruptive social innovation. The focus on deep-tech innovation contradicts the attention to interdisciplinarity given in the rest of Horizon Europe.

- According to a participant representing an association for technology research, the requirement for co-investors was not communicated well, it is quite challenging for start-ups to meet and this in turn can hinder their participation.
- A National Contact Point highlighted the need to improve communication on the EIC calls, the participation rules and the administrative procedures. Due to the peculiarities of the programme compared to the rest of Horizon Europe, these aspects differ from the rest of the FP. For this reason, additional communication and training is needed to explain them to potential applicants and participants.
- It is difficult for applicants and participants to understand how the EIC portfolio has been built and works, as it appears completely different from other EU initiatives.
- Some concerns were expressed regarding the rejection process as a participant representing a network of universities reported difficulties in communicating with evaluators.
- The budget for the Pathfinder and Transition components was considered insufficient from academic stakeholders.

Figure 46: Stakeholder breakdown – Creation of EU Missions (N= 1565)

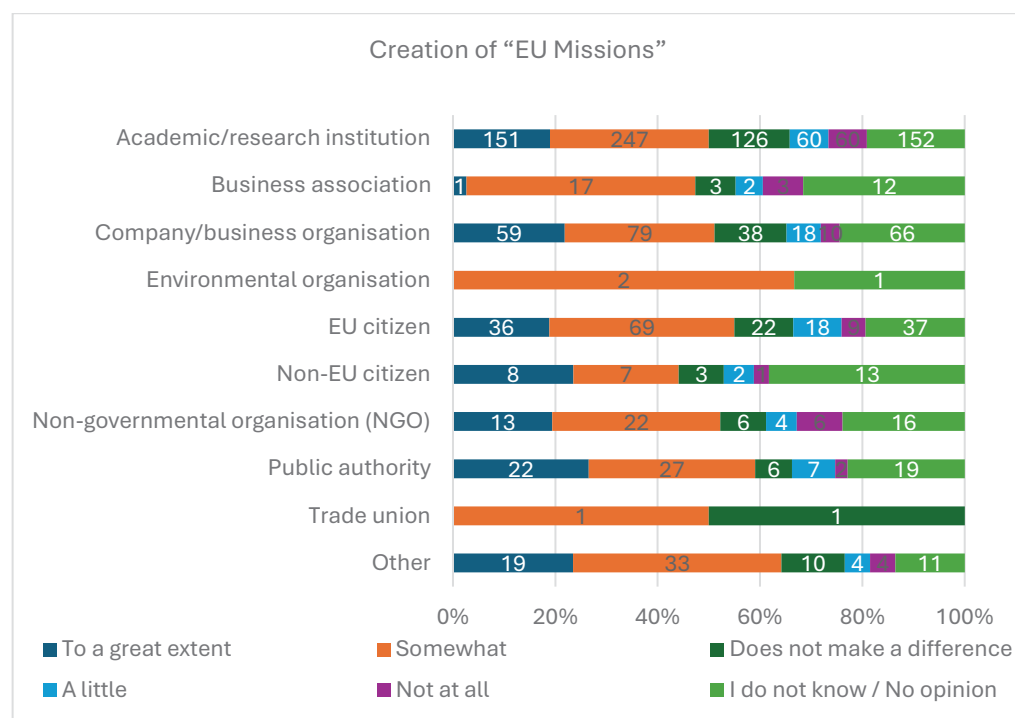


Figure 47: Stakeholder breakdown – Creation of a pillar grouping societal and industrial issues (N= 1560)

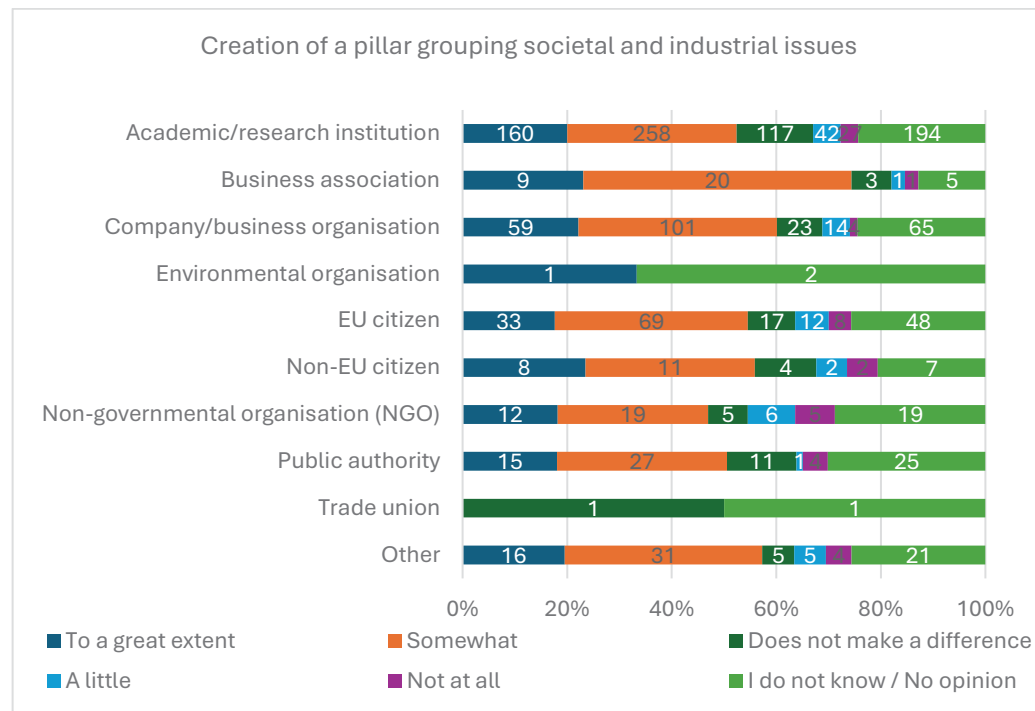


Figure 48: Stakeholder breakdown – New approach to Partnerships (N= 1567)

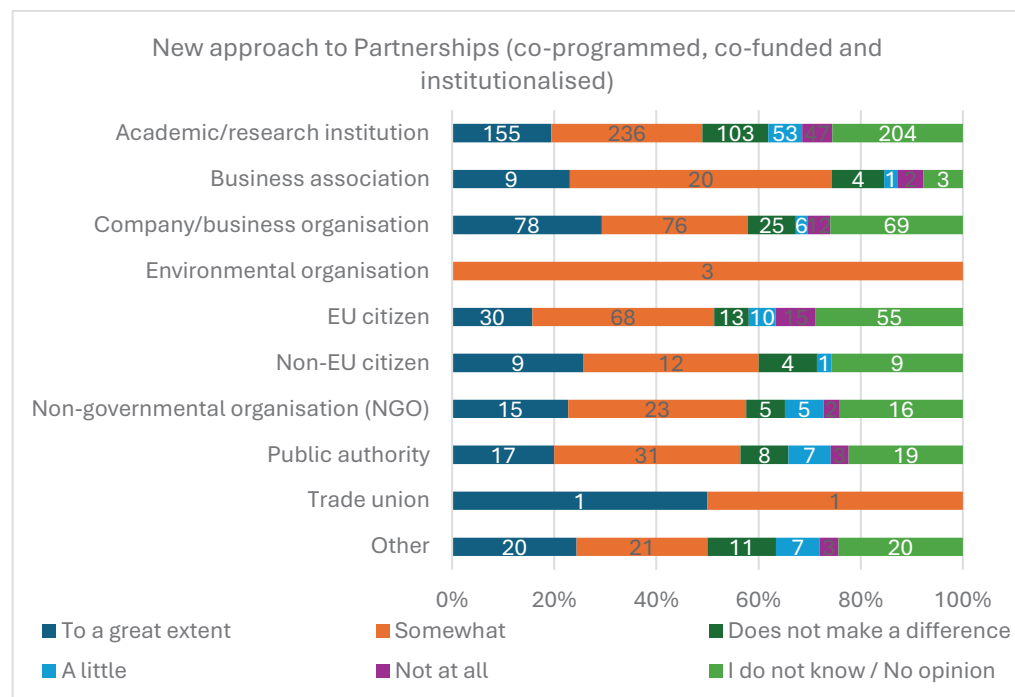
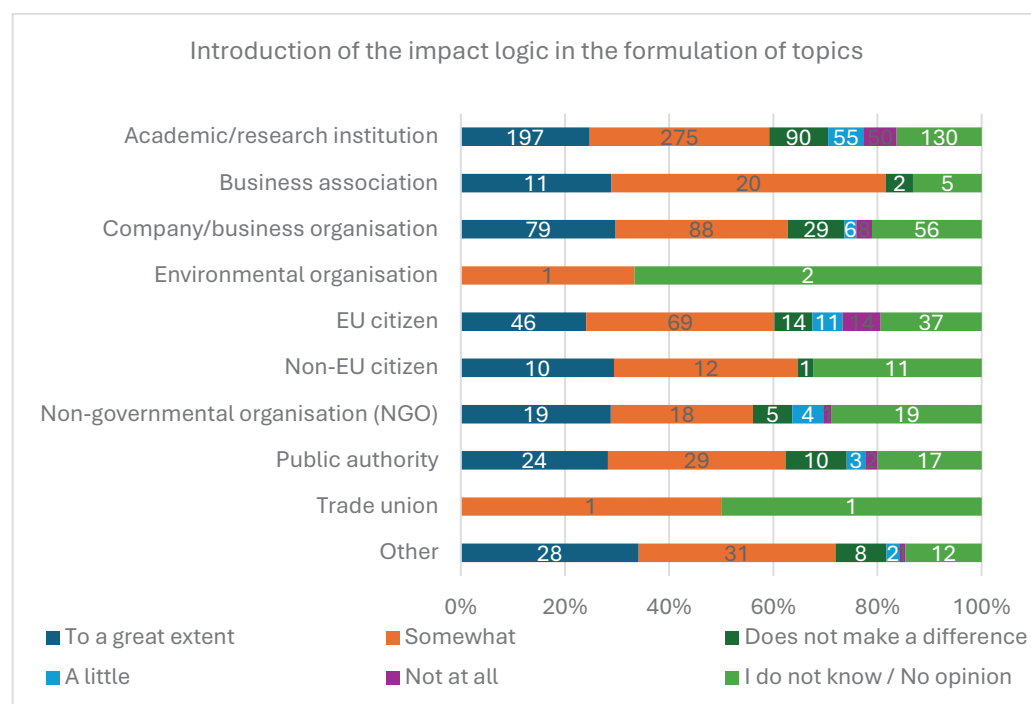


Figure 49: Stakeholder breakdown – Introduction of the impact logic in the formulation of topics (N= 1564)



## Implementation and administrative procedures

### Design and implementation of the calls for proposals

Most respondents agreed with the following statements: “the rules of participation [are] clear” (77%; 1 218), that “the standard application form [facilitates] the application” (67%; 1 053) and that “the descriptions of the calls for proposals [are] clear” (64%; 1 110) and “frequent enough” (58%; 905). However, 29% (457) of respondents maintained that finding the right call for proposals was difficult and 31% (485) of respondents did not think that “there [is] an adequate mix of calls for proposals addressing specific topics (top-down) and calls for proposals without a pre-defined topic (bottom-up)”<sup>213</sup>.

51 position papers discussed aspects of the calls for proposals. Several of these topics were discussed more in depth during the public event. The main messages concern:

- The scope of the calls for proposals. Several research organisations and universities deemed the description of the calls for proposal in Horizon Europe as too vague and “multidimensional”. As a result, only large consortia can address every aspect of the call and it is difficult to understand how researchers in different disciplines should contribute to the projects. Moreover, according to some respondents, vague calls for proposals worsen the risk of oversubscription.
- The template for the proposal. There were different views on whether or not the page limit of the template simplifies the application. Some position papers highlighted the challenges experienced in filling in specific parts of the template due to its alleged rigid structure and its page limit. The new page limits set in the Horizon Europe application forms (part B)

<sup>213</sup> This opinion is shared especially among academic and research organisations. The results of the analysis broken down by type of respondent are reported in Table 23 and Table 24- additional statistics.



was generally seen as positive by the event participants, since proposals are now shorter, more concise and to the point. However, some applicants claim that the page reduction has posed a new challenge to proposal writing, as sometimes there is not adequate space to address exhaustively all the aspects requested by the calls for proposals. This issue is particularly relevant for large consortia, since part of the proposal is dedicated to the partners' description.

- Using the two-stage application procedure. Whilst some actors thought that the current balance between two-stage and single-stage application procedure is appropriate (e.g., an association representing universities), other actors (e.g., some research organisations, a business association, a public authority) would like to expand the use of the two-stage procedure.
- The challenging submission deadlines. Some respondents considered that finding and responding to calls for proposals within a restricted time frame and with sometimes overlapping deadlines was difficult. Likewise, during the event, some applicants expressed the need to review the frequency of the calls for proposals, asking for more flexibility. According to them, the calendar of the deadlines for submission doesn't always consider public holidays or celebrations.
- The balance between top-down and bottom-up calls. In their position papers and during the event, some universities and research organisations, but also some public authorities, pointed out the need for more bottom-up calls for proposals, especially in Pillar II. In their opinion, the bottom-up approach would facilitate the deployment of Social Sciences and Humanities within the Framework Programme.
- According to the event participants applicants are generally satisfied with the quality and availability of information provided to fulfil a proposal application. However, some stakeholders reported a few cases where mixed and non-consistent information was found between call documents, F&T portal and the info-days organized by NCPs. In this respect, stakeholders called for better use of the FAQ section on the F&T Portal.
- Some position papers appreciated the existence of an updated Funding and Tenders Portal, although some technical improvements are suggested. Similarly, some event participants expressed their concern over the technical flaws of the F&T portal, especially close to the deadlines, when the system is often perceived as unstable. Moreover, the imposed "two-factor" authentication method may slow down the administrative procedures.

Figure 50. To what extent do you agree with the following statements concerning the calls for proposals under Horizon Europe?

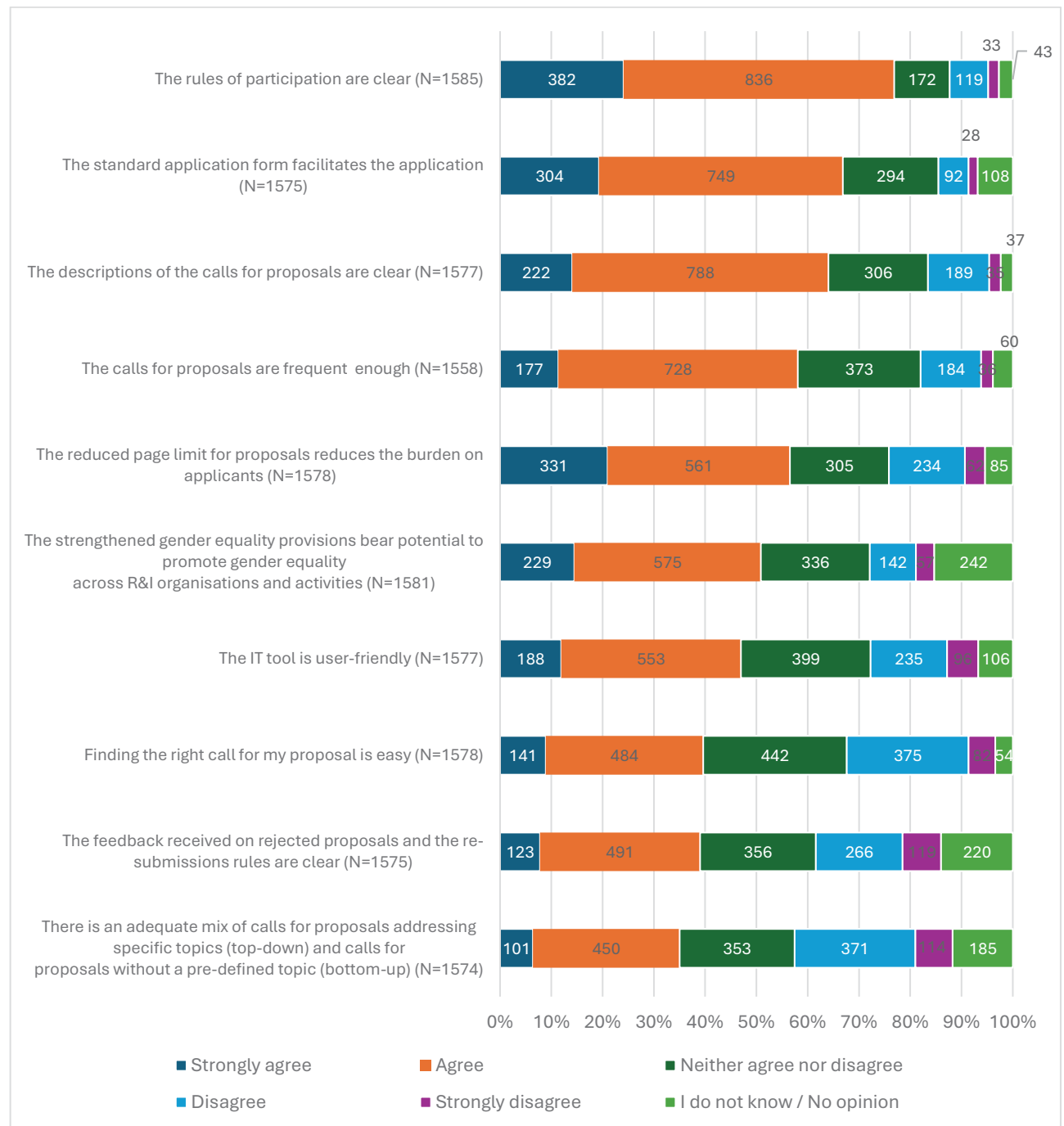


Figure 51: Stakeholder breakdown – Rules of participation are clear (N= 1585)

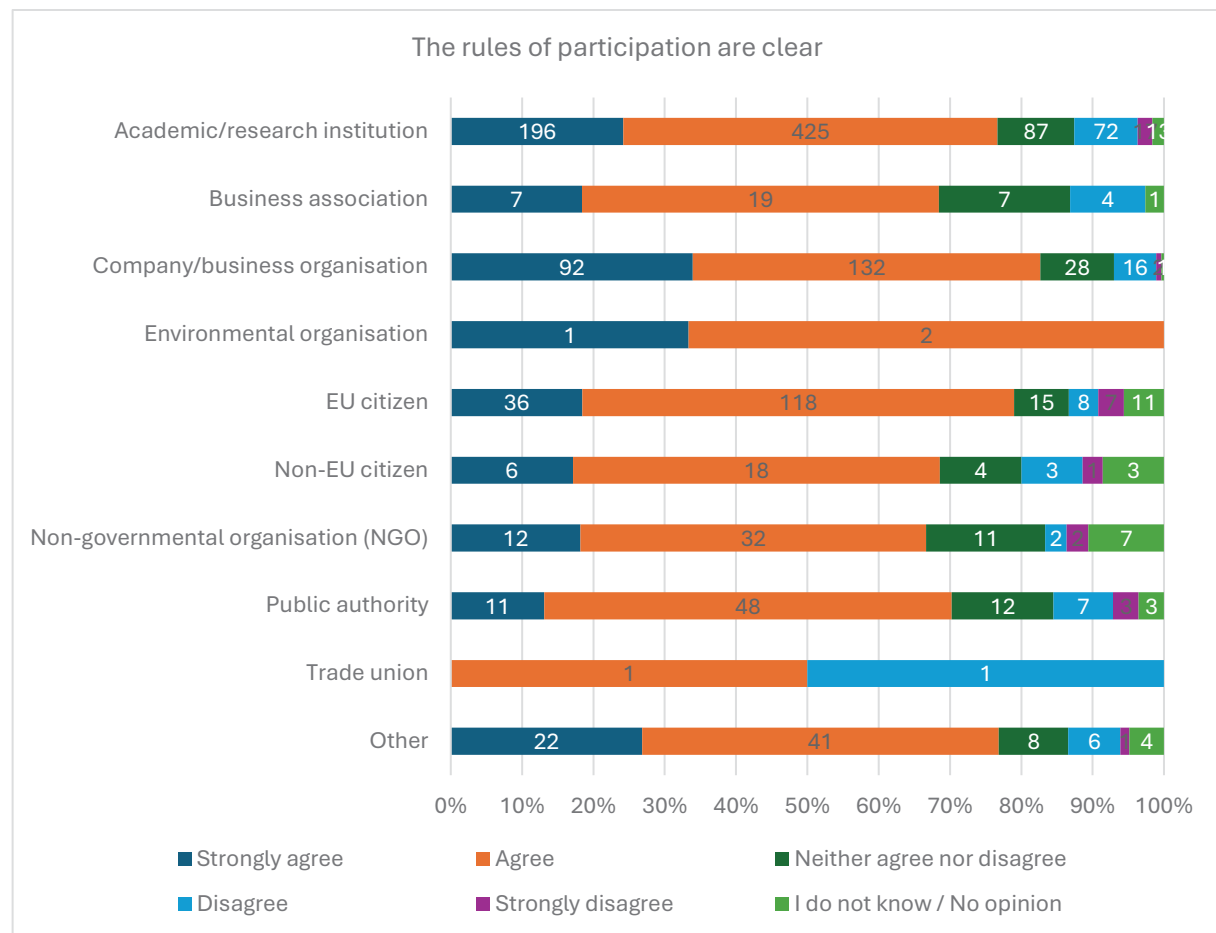


Figure 52: Stakeholder breakdown – The standard application form facilitates the application (N= 1575)

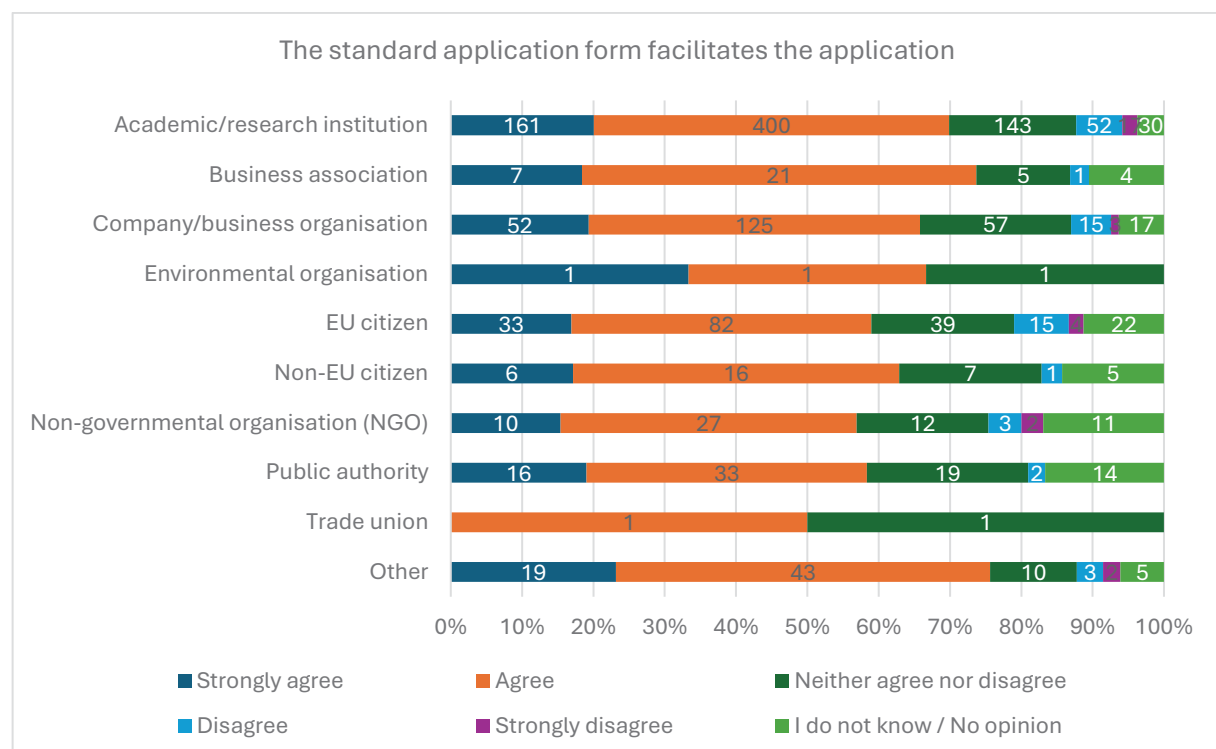
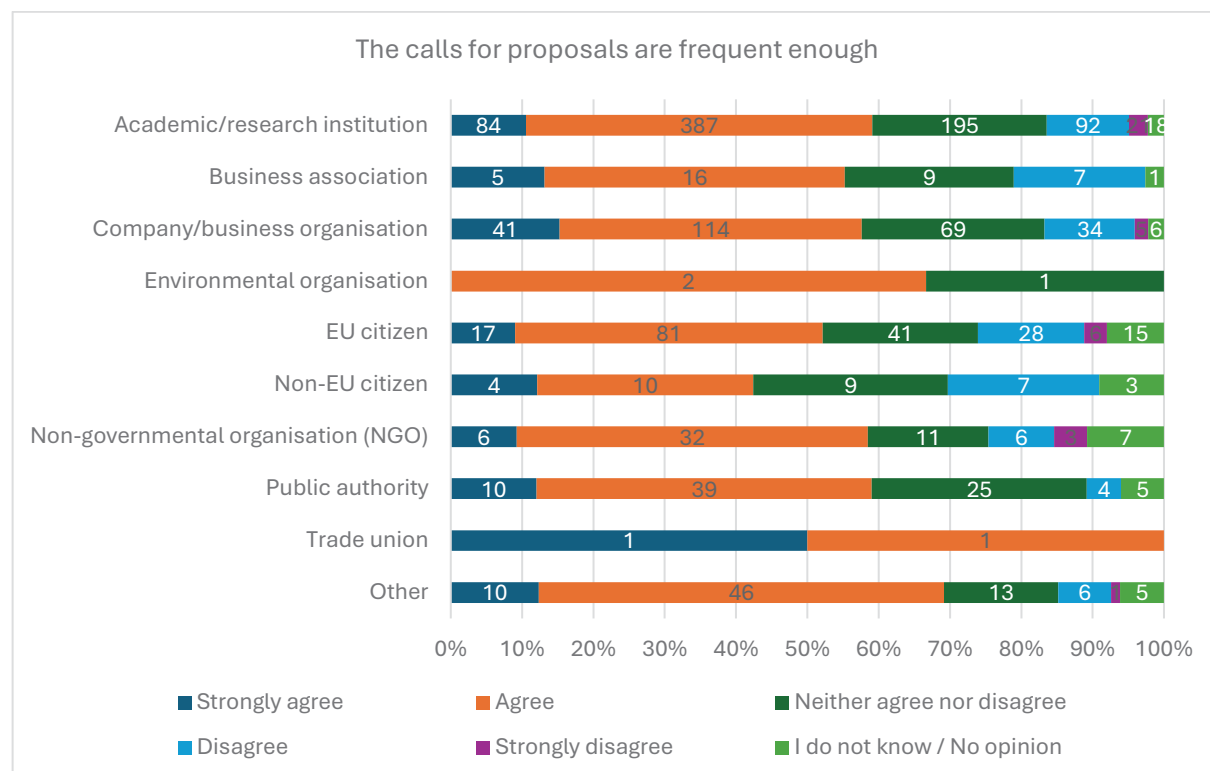


Figure 53: Stakeholder breakdown – The calls for proposals are frequent enough (N= 1558)



## Evaluation of proposals

Most respondents agreed or strongly agreed that the “time to sign the grant agreement” (65%; 1 028) and the “time to evaluate the proposals” (63%; 1 002) was “adequate”. Whilst 44% (698) of respondents thought that the feedback received from the evaluation was “clear and informative”, 24% (383) of respondents disagreed or strongly disagreed with this statement. Likewise, whilst some position papers highly valued the evaluation system of Horizon Europe and observed improvements over time, others underlined the need for more consistent and detailed feedback in the evaluation reports.<sup>214</sup> Some research organisations and associations thereof welcomed the “right to react” mechanism, but a national agency supporting applicants put into question the effectiveness of the procedure.

Six papers referred to the “blind evaluation process” that has been piloted, stating that stakeholders were interested in the results of the pilot and in the possibility of expanding its use.

Although stakeholders recognised that efforts have already been made to reduce the time to grant, the actual time between proposal submission and evaluation was still considered too long by different stakeholders (e.g., respondents from universities, from business associations).

### Box 5: Main messages on the evaluation of proposals from the public event

- Applicants are generally satisfied with the timing for proposal evaluation and the signature of the Grant Agreement, seen as mostly “adequate”.

<sup>214</sup> 51 position papers discussed aspects of the evaluation of proposals.

- However, they have raised several concerns related to the quality and clarity of the evaluations provided through the ESRs. Comments of the evaluators are sometimes reported as too generic, contradictory and not really helpful for a reworking the proposal for a new submission.
- Although the Horizon Europe programme is highly impact-oriented, an academic stakeholder has highlighted that some evaluators are lacking adequate preparation or guidance on how to adequately assess impact. Differences between the scopes of the different Clusters should also be taken into account.
- Likewise, higher competences in evaluating integrated SSH aspects would be welcome, given the increasing space and importance that these disciplines are receiving in many topics.
- According to a participant representing a business company, the evaluators specific field of expertise should be in line with the scientific field of the proposal. Otherwise, the risk is to receive misplaced or inconsistent evaluation, especially in the case of disruptive technology.
- It was suggested by academic stakeholders that the guidelines for evaluators provided by the programme's officers should be public, thus ensuring more transparency in the evaluation process.

Figure 54. To what extent do you agree with the following statements concerning proposal evaluation under Horizon Europe?

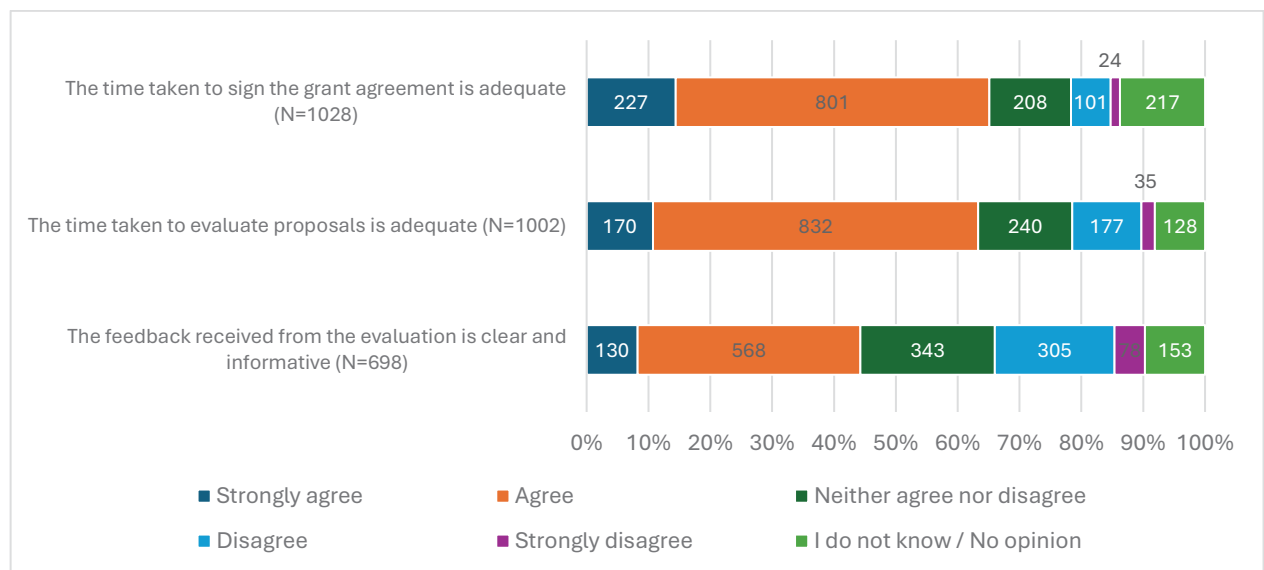


Figure 55: Stakeholder breakdown – The time taken to sign the grant agreement is adequate (N= 1028)

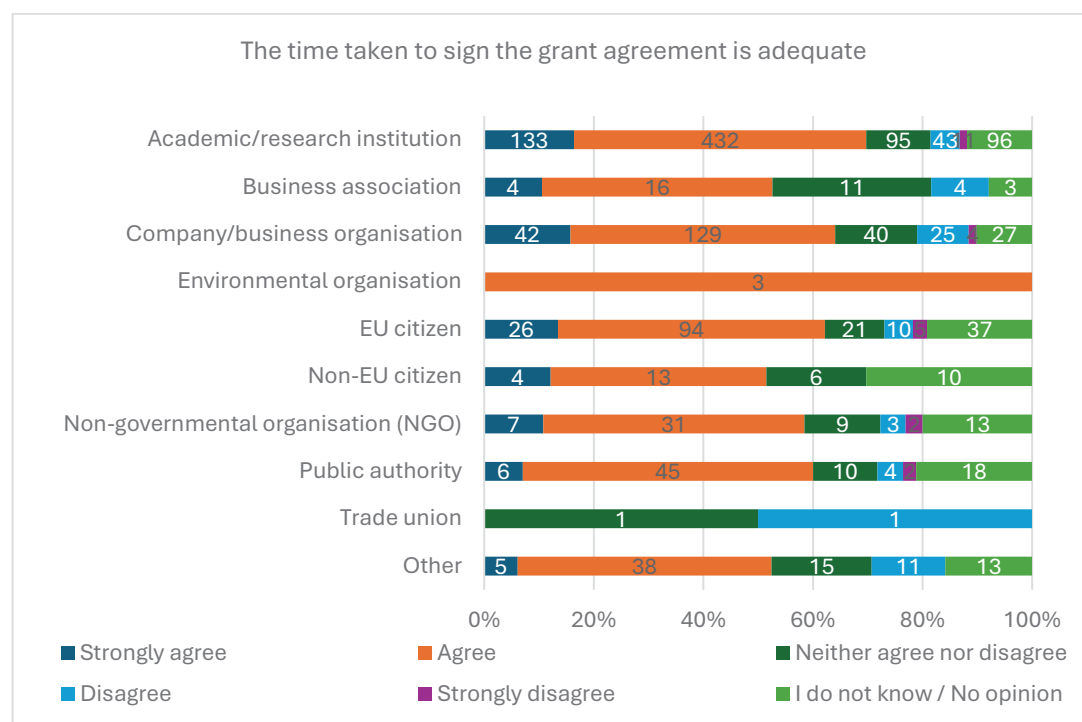


Figure 56: Stakeholder breakdown – The time taken to evaluate proposals is adequate (N= 1002)

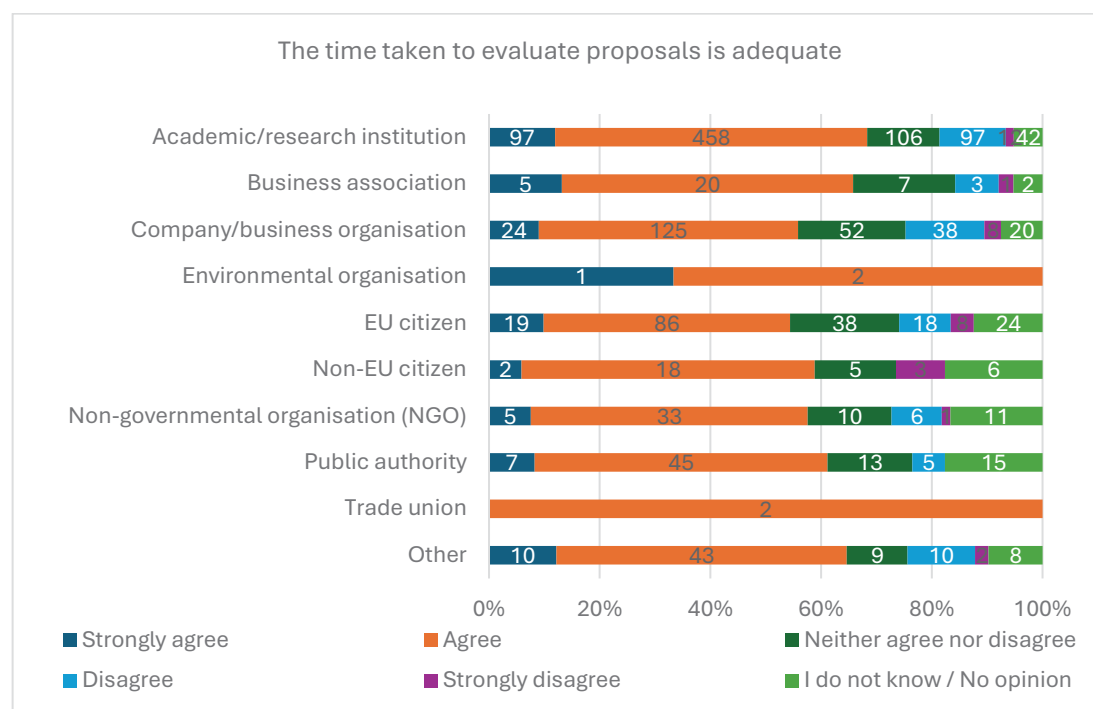
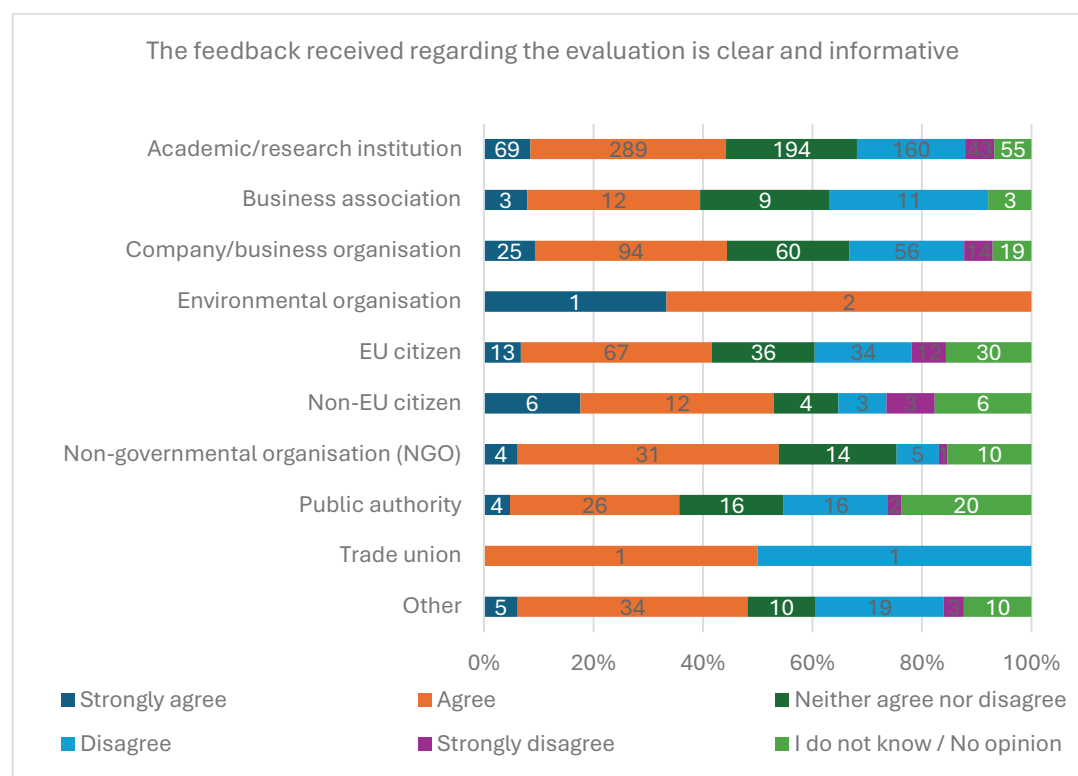




Figure 57: Stakeholder breakdown – The feedback received regarding the evaluation is clear and informative (N= 698)



## Project implementation

Most respondents agreed or strongly agreed that “the standard templates facilitate project reporting” (62%; 978), that “the mechanisms for project monitoring and reporting were adequate” (61%; 955), that their “organisation’s usual accounting practices were accepted” (59%; 1 933), that “the cost calculation rules were clear” (59%; 925). The majority of respondents were “satisfied with the support received by the EC services (including agencies) during grant preparation and implementation” (52%; 813) and agreed or strongly agreed that “the extension of the single audit principle reduces the burden on beneficiaries (51%; 790). Conversely, only 39% (616) of respondents agreed or strongly agreed that “the use of lump sum funding reduces the burden on beneficiaries” and 15% (233) maintained the opposite. 63 position papers commented on aspects of project implementation. Several of these topics were discussed more in depth during the public event. The main messages concerned:

- **The lack of the Annotated Model Grant Agreement** and the delays for a final Annotated Model Grant Agreement - this issue was raised also during the public event. The event participants also urged the publication of an Indicative Audit Programme to receive detailed rules on auditing.
- **The lump sum funding.** The position papers expressed different views on whether the lump sum funding reduces the burden on beneficiaries, depending also on the project size. Many stakeholders, including universities, national research centres and a large company, recommended a thorough evaluation of the funding scheme before expanding its use, especially for large collaborative applied research projects. While the simplification brought by lump sum schemes has been generally appreciated, concerns were raised by different stakeholders, in particular by a series of European associations of research centres, on the intensification of the workload in the proposal stage. Moreover, research and

technologies organisations (RTOs) report experiencing a lack of genuine collaboration among partners in large projects working with lump sums, as a result of different approaches aiming to minimise financial risks. On the other hand, representatives from the R&I community from Italy, Czech Republic, Lithuania, and Poland observed the simplified reporting, the reduced financial errors, and the decreased administrative burden induced by lump sum funding and have explicitly called for its extension.<sup>215</sup>

- **The increasing difficulties in managing projects due to large consortia.** A participant in the event acting as NCP reported that it is becoming increasingly difficult to manage big consortia, especially in relation to the budget and administration. This aspect affects the expected level of participation of SMEs, since only experienced project managers have the experience and resources to deal with large consortia.
- **The tools for reporting and monitoring.** Most event participants are satisfied with the standard tools for reporting and monitoring and find very useful the assistance received by the EC services (including agencies) during grant preparation and implementation.
- **The new cost calculation rules.** According to some respondents, the new rules have not simplified the reporting and may have shifted costs towards the preparation phase. During the event, contrasting views were expressed on the measures to simplify the calculation of personnel costs. Whereas some participants consider the 215-day-a-year rule as a positive simplification, other academic actors see it as a rigid scheme that does not allow for the calculations to be adapted to the specificities of each country or entity.
- **The decentralisation of project management to the executive agencies.** The collaboration between the EC Project Officers and the beneficiaries is broadly positive. However, some participants have experienced high turnover and frequent changes in the people acting as Project Officer, which is reported as not beneficial for the project execution. In addition, an academic participant expressed concerns about the efficiency of the communication channels with the Commission, since he/she experienced fragmentation in communication between the Project Officer and the Commission.
- **The integration of gender aspects into project implementation.** The increasing importance of Gender Equality Plans (GEP) has been widely welcomed by the event participants. However, while the adoption of GEPs is often quite simple and straightforward for universities, it may not be the same for other types of organizations. More guidance and support on how to design the GEPs and how to effectively integrate gender aspects into project implementation would be welcome to avoid turning GEPs into a “just-tick-the-box” exercise.
- **18 position papers provided comments on the EC communication and information activities.** These stakeholders expressed appreciation for the effort made by the Commission, such as organisation of Infodays, and webinars. They point to areas in which communication and guidance can be improved: Synergies with other EU programmes and the Model Grant Agreement.

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<sup>215</sup> For further information on lump sums, please refer to Annex 4, Section 4.4.2.

Figure 58. To what extent do you agree with the following statements concerning the project implementation under Horizon Europe?

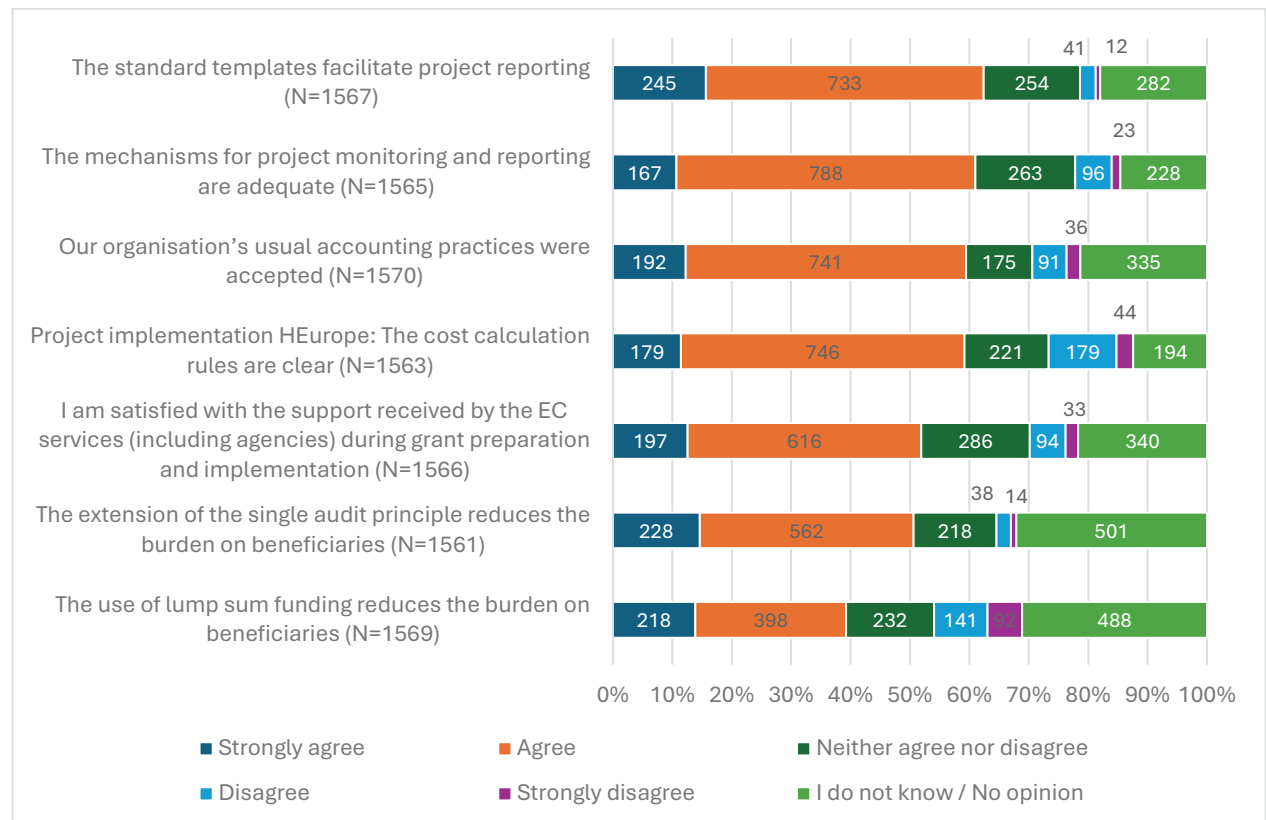


Figure 59: Stakeholder breakdown – I am satisfied with the support received from the EC services (N= 1566)

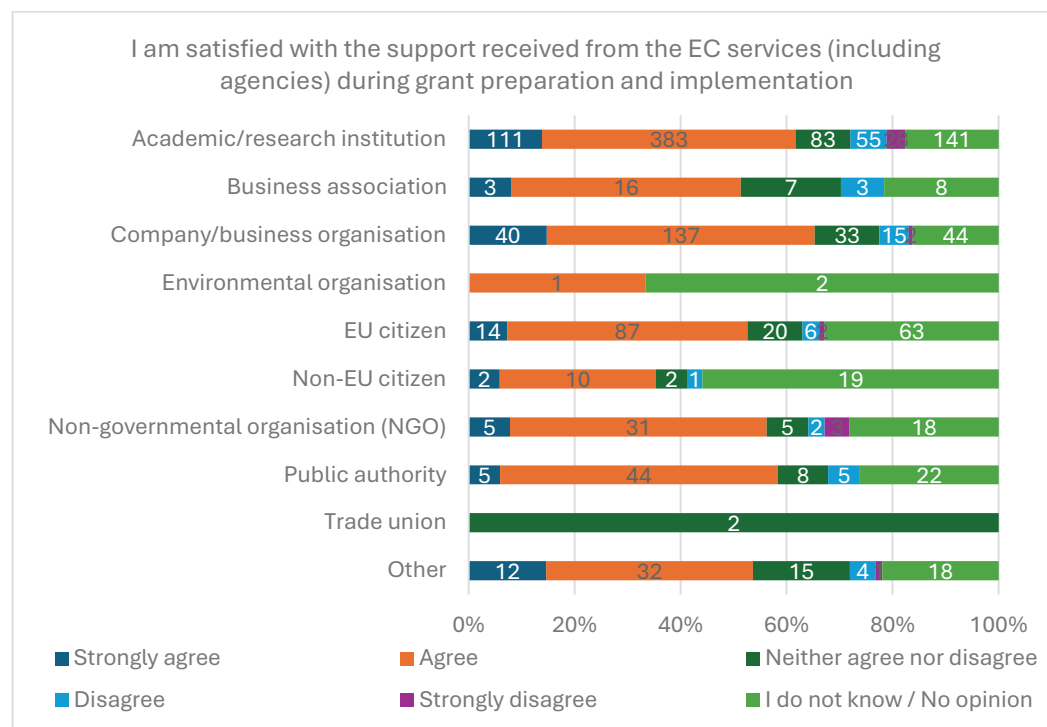


Figure 60: Stakeholder breakdown – The cost calculation rules are clear (N= 1563)

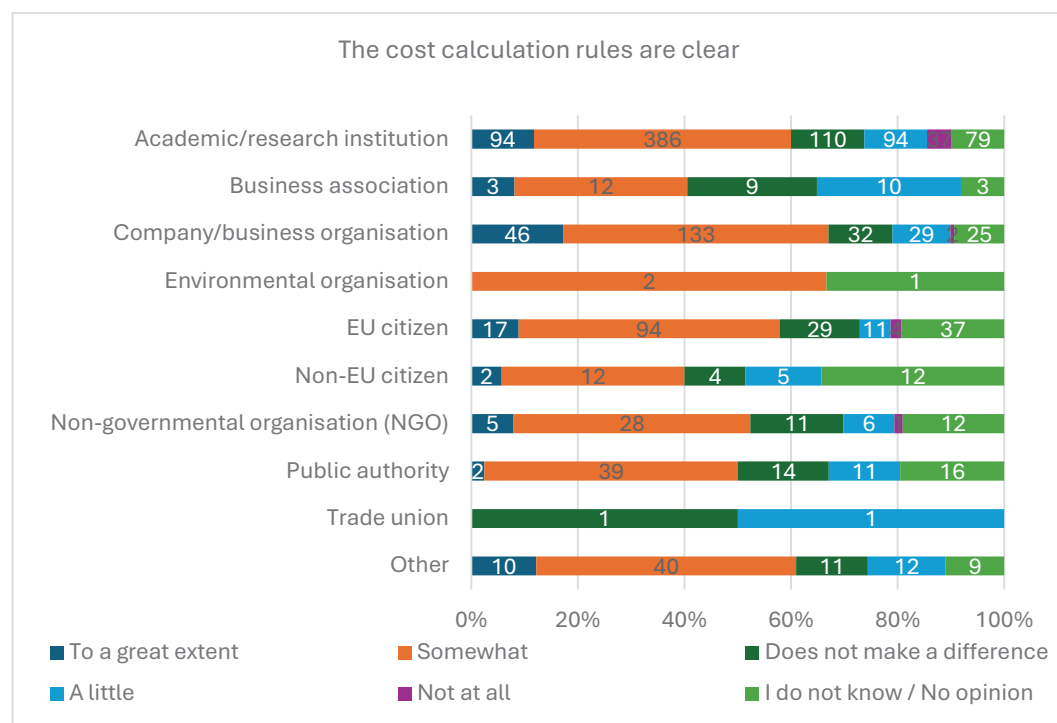


Figure 61: Stakeholder breakdown – Our organisation's usual accounting practices were accepted (N= 1570)

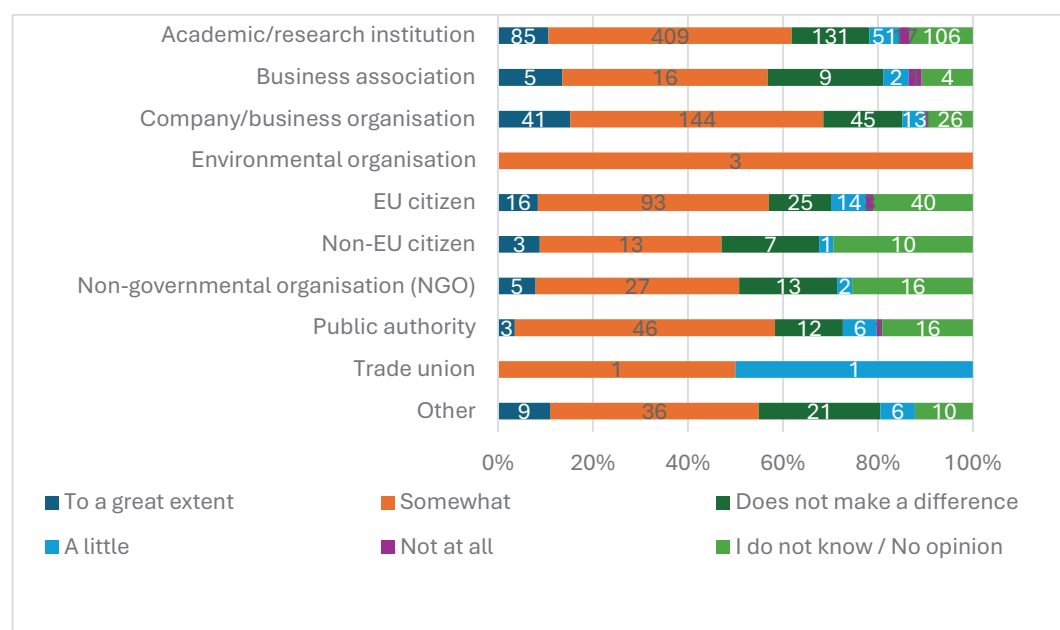


Figure 62: Stakeholder breakdown – The mechanisms for project monitoring and reporting are adequate (N= 1565)

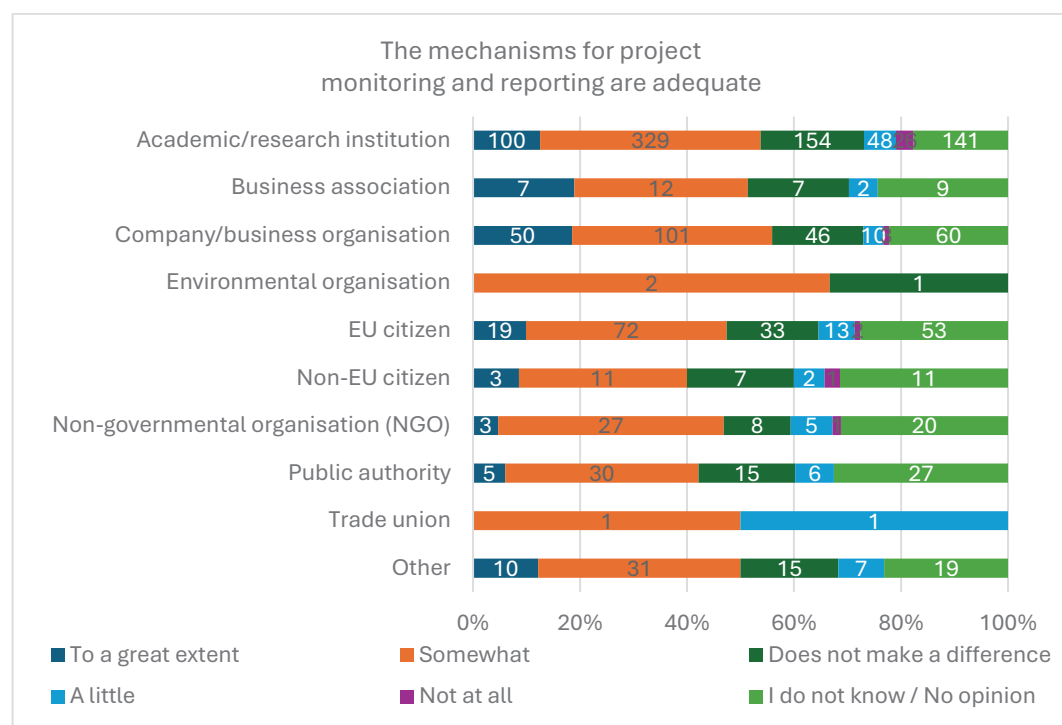


Figure 63: Stakeholder breakdown – The standard templates facilitate project reporting (N= 1567)

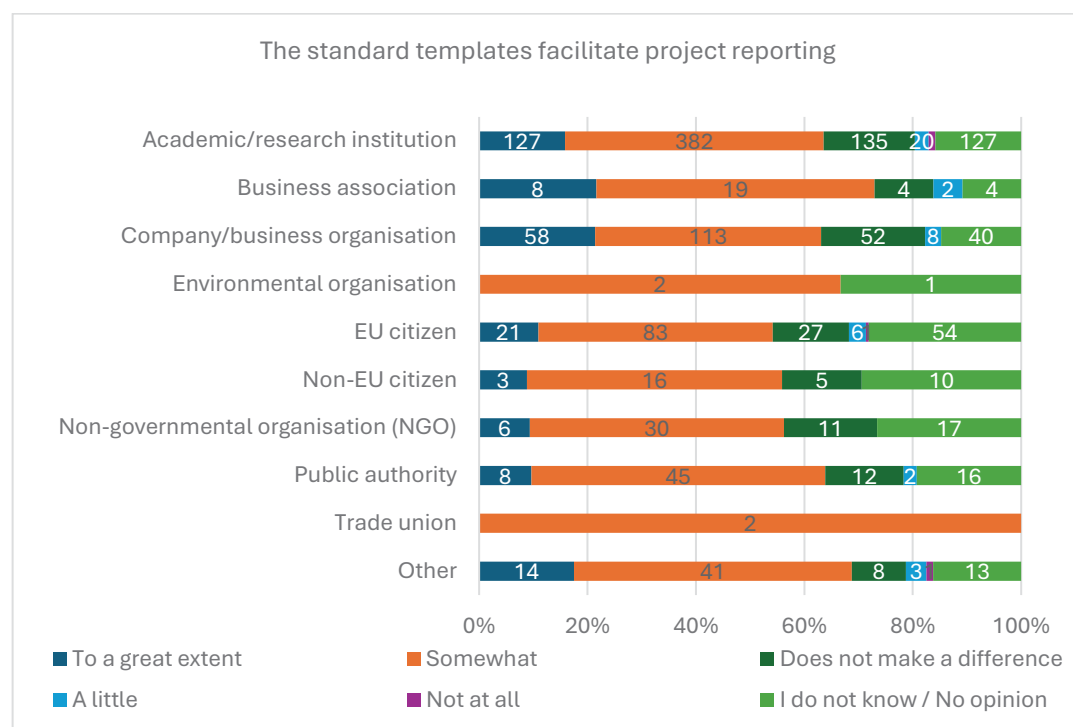


Figure 64: Stakeholder breakdown – The extension of the single audit principle reduces the burden on beneficiaries (N= 1561)

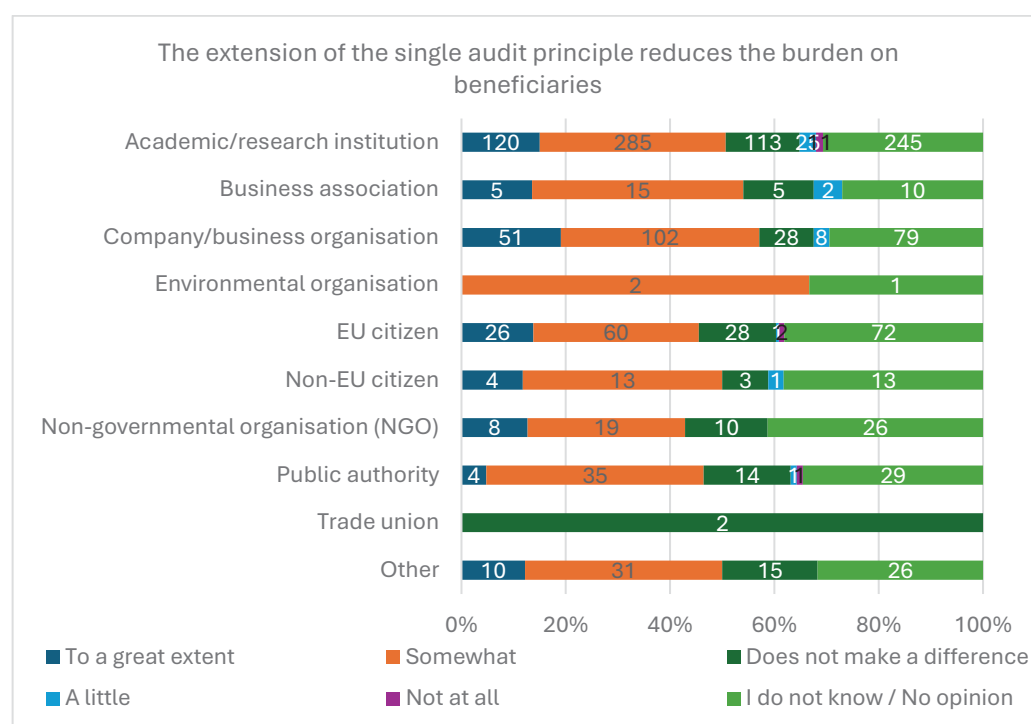
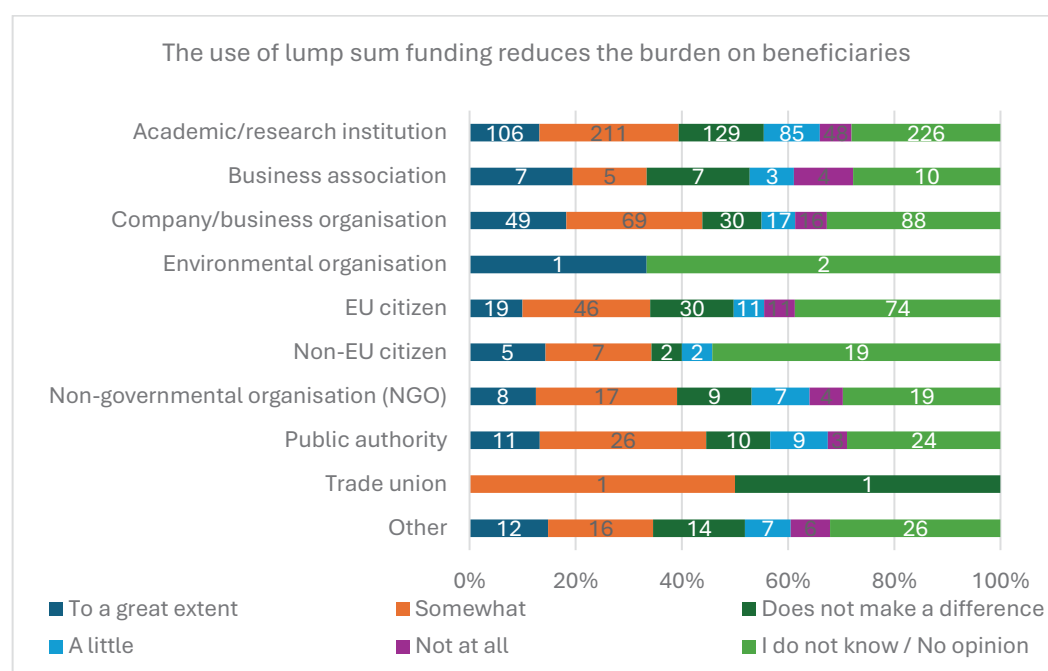


Figure 65: Stakeholder breakdown – The use of lump sum funding reduces the burden on beneficiaries (N= 1569)



## Satisfaction with the types of support

Considering only the responses of those who expressed an opinion or used the specific type of support, the share of respondents who were “satisfied” or “very satisfied” is above 50% for the following types of support:

- Grants for collaborative projects (80%; 1099)



- Grants for single beneficiary projects (65%; 592)
- Support for networking (57%; 551)
- Technical assistance (54%; 447)
- Training and expert advice (52%; 450).

Conversely, the types of support with the lowest share of respondents who were “satisfied” or “very satisfied” are:

- Prizes (36%; 169)
- Blended finance (grants and equity support) (35%; 151)
- Public procurement (34%; 156)

Nonetheless, the types of support with the highest share of respondents who are “dissatisfied” or “very dissatisfied” are European Partnerships (22%; 204) and EU Missions (24%; 196). Nevertheless, it is important to acknowledge that for both European Partnerships and EU Missions, positive responses (“satisfied” or “very satisfied”) outweigh negative ones (“dissatisfied” or “very dissatisfied”). For European Partnerships, 446 and for EU Missions 325 respondents indicated that they are either satisfied or very satisfied (out of 1 564 and 1 546 total replies respectively). For the European Partnerships the share of “dissatisfied” or “very dissatisfied” respondents was higher among public authorities (31.6%), NGOs (28.9%) and academic and research organisations (24.1%) than among companies and business organisations (9%) or business associations (12%)<sup>216</sup>. Likewise, for the EU Missions the share of respondents who were “dissatisfied” or “very dissatisfied” was higher among NGOs (38.2%), academic and research organisations (25%) and public authorities (24.6%) than among companies and business organisations (13.3%)<sup>217</sup>.

During the event, a participant representing a European industrial association claimed that the increased size of funding and partnerships, as well as the higher complexity of projects, has not led to higher efficiency from Horizon 2020 to Horizon Europe. A better balance between large projects with a broad value-chain prospective and small projects with a narrower technology development angle should be found.

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<sup>216</sup> The results of the analysis broken down by type of respondent are reported in the additional statistics section further below.

<sup>217</sup> The results of the analysis broken down by type of respondent are reported in the additional statistics section further below.

Figure 66. What is your level of satisfaction with the way the European Commission implements the following types of support under Horizon Europe?

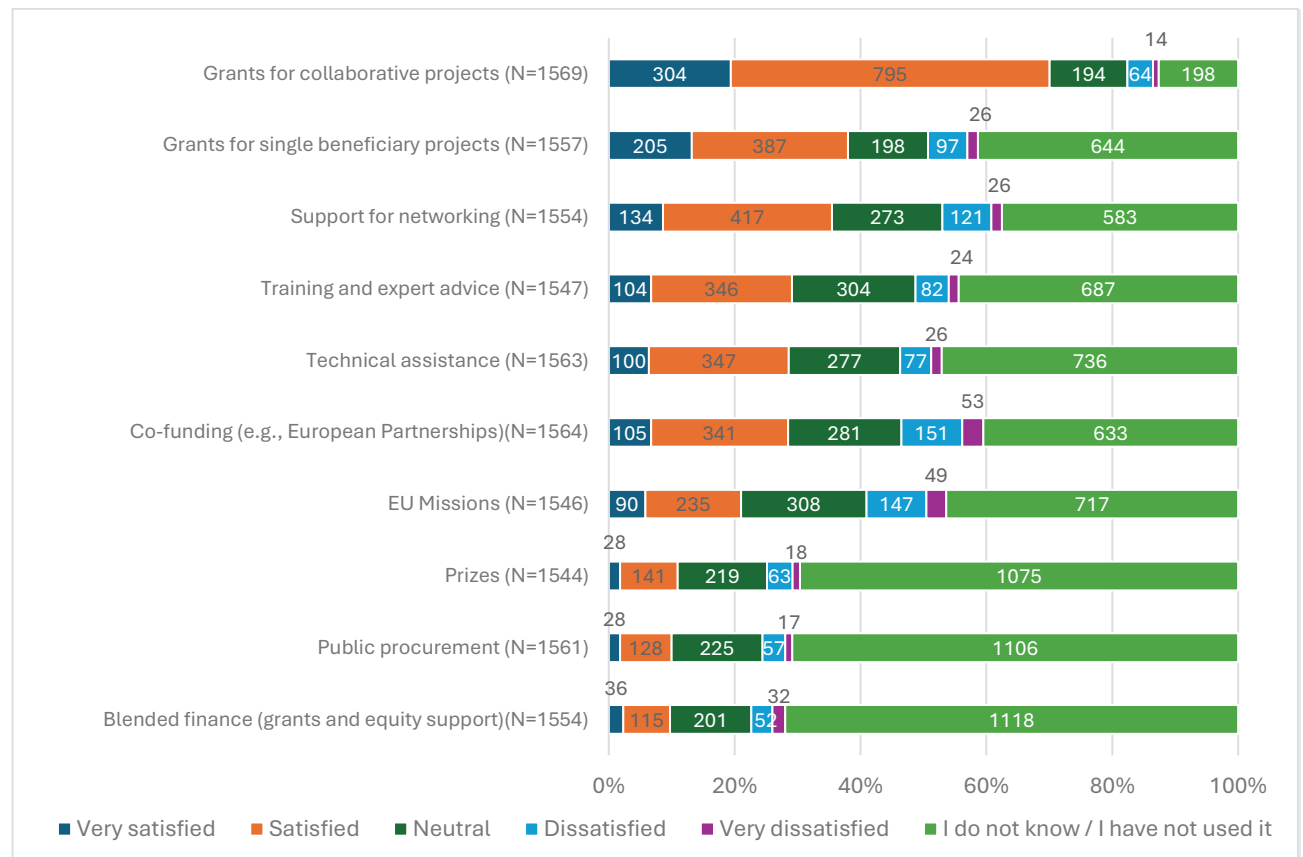


Figure 67: Stakeholder breakdown – Grants for collaborative projects (N= 1569)

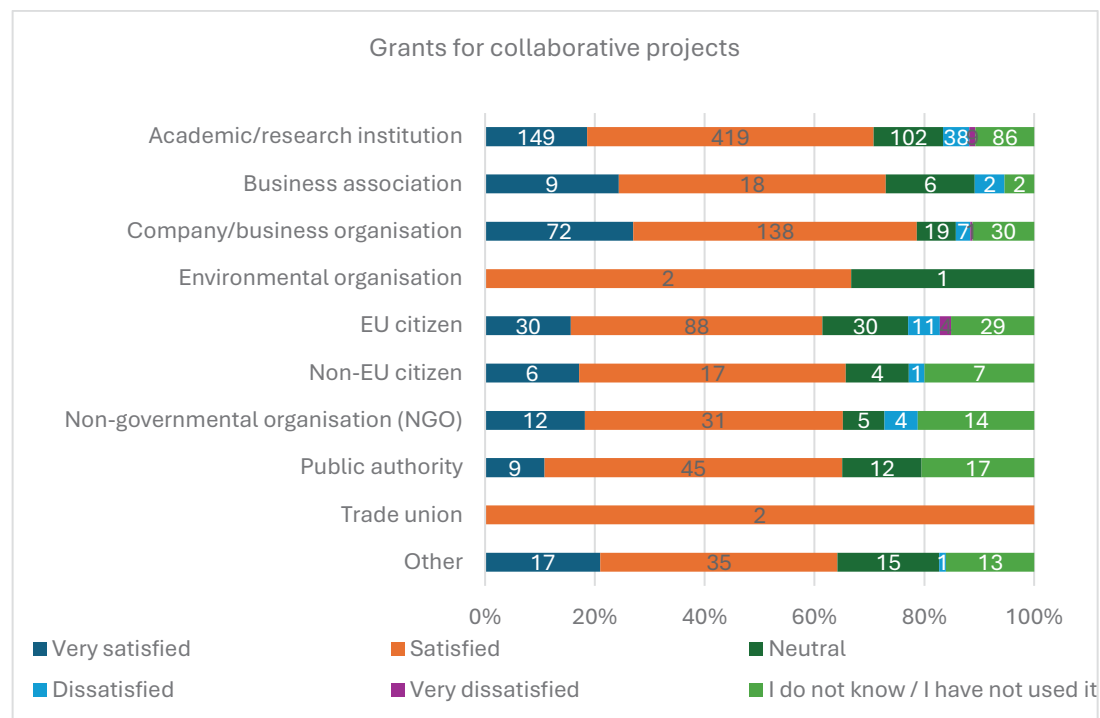


Figure 68: Stakeholder breakdown – Grants for single beneficiary projects (N= 1663)

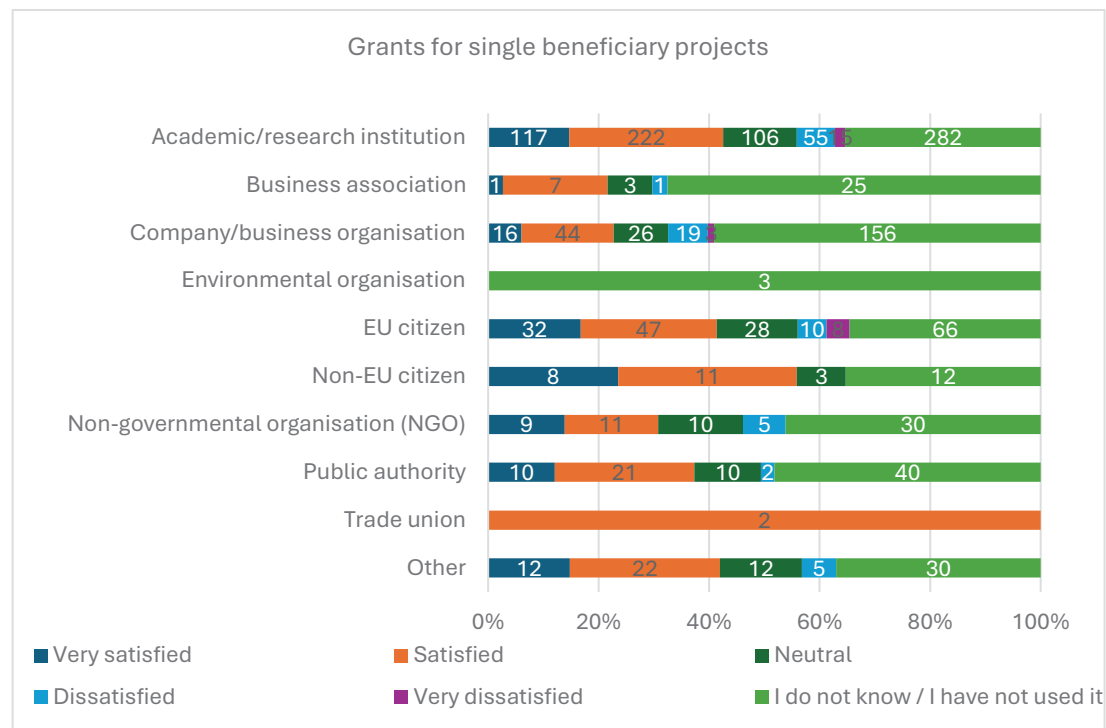


Figure 69: Stakeholder breakdown – Blended finance (N= 1554)

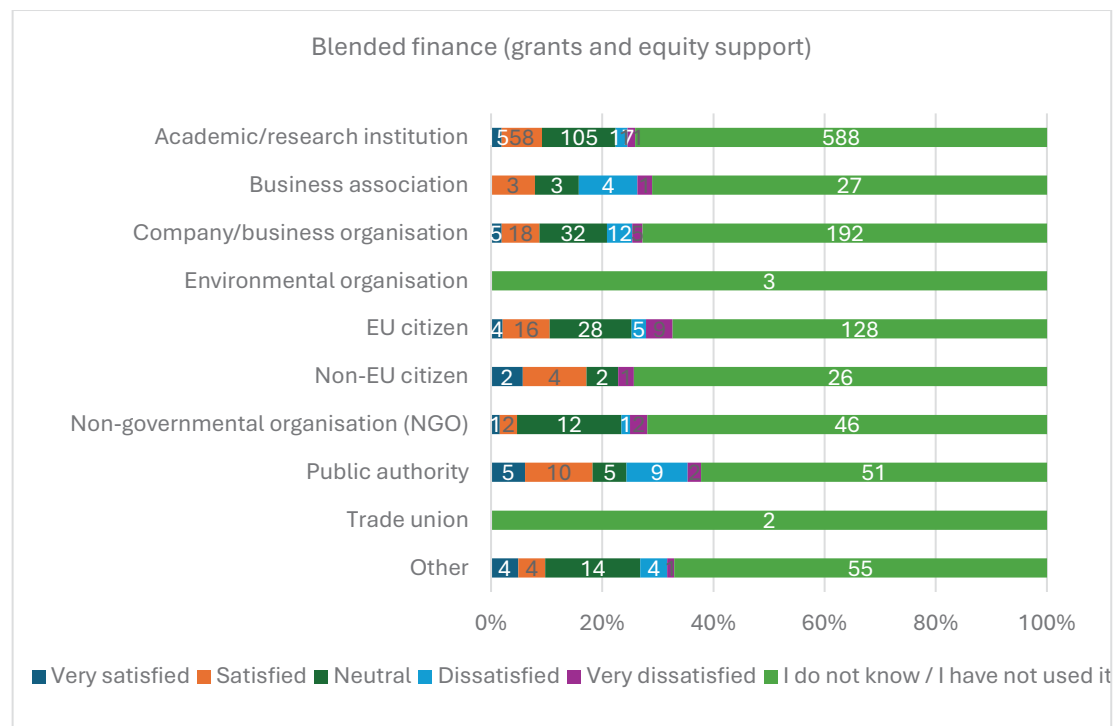


Figure 70: Stakeholder breakdown – Public procurement (N= 1561)

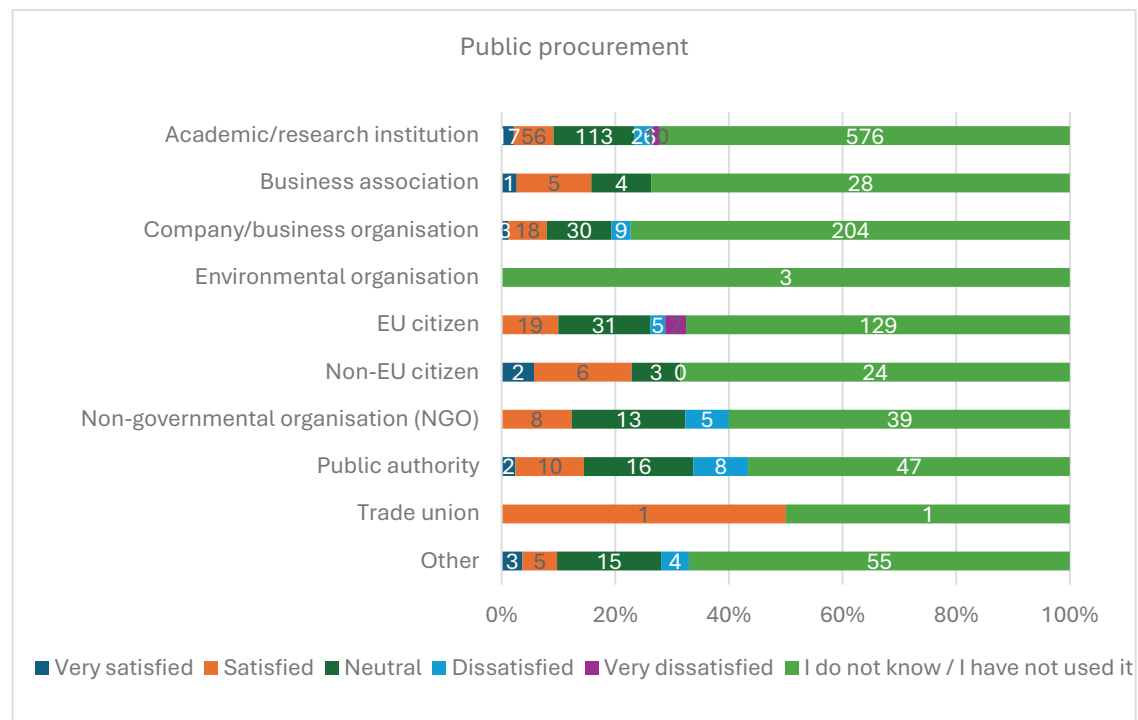


Figure 71: Stakeholder breakdown – Prizes (N= 1544)

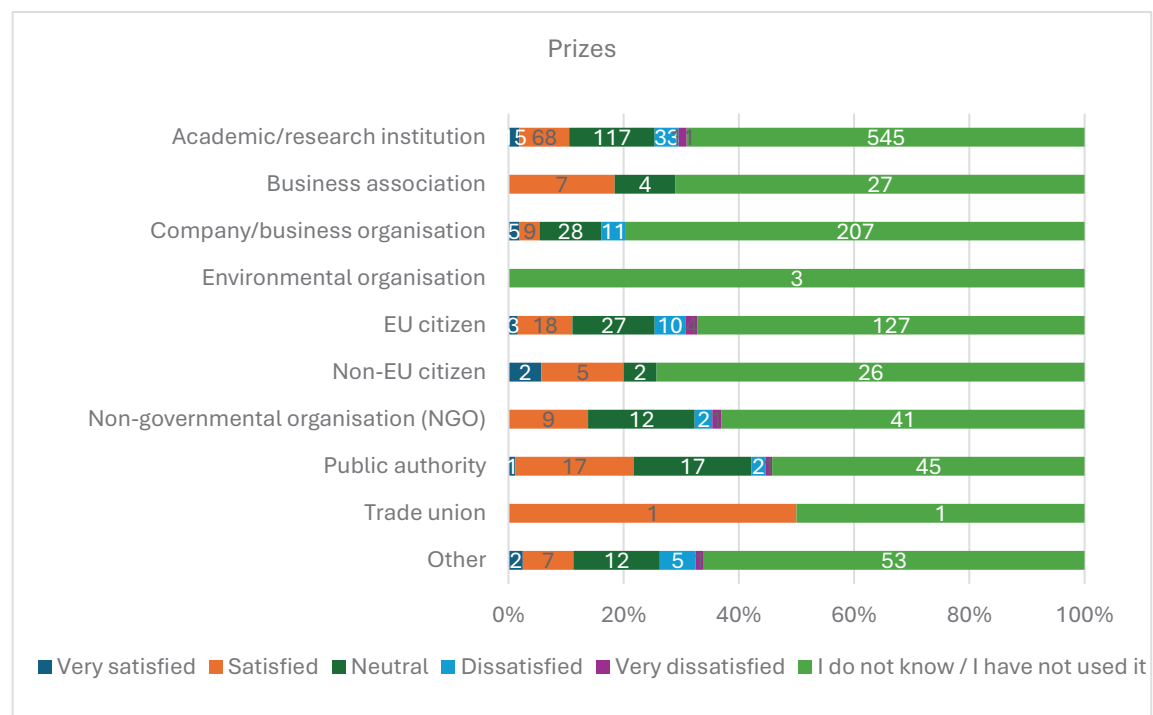


Figure 72: Stakeholder breakdown – Co-funding (N= 1565)

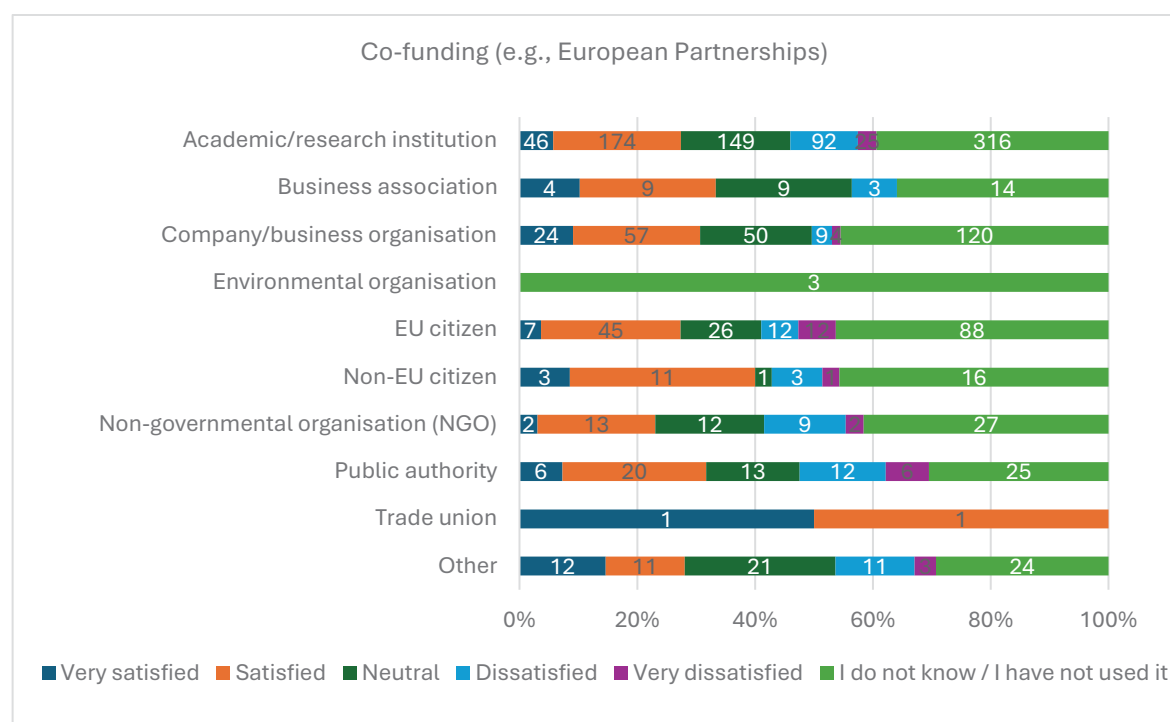
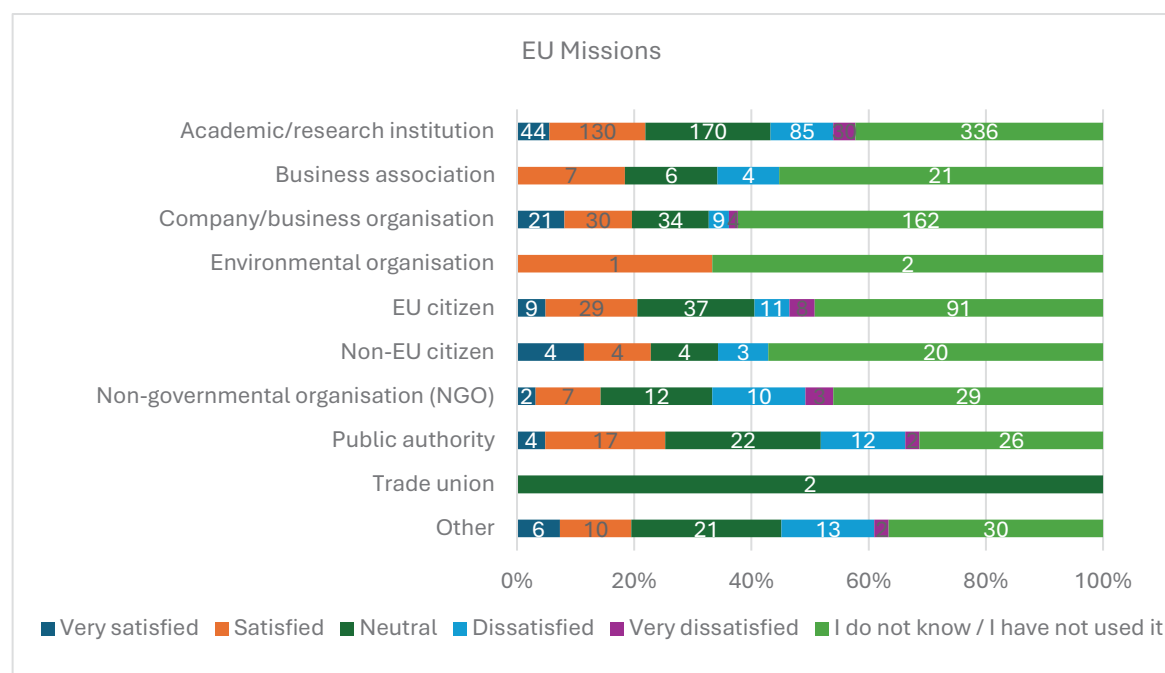


Figure 73: Stakeholder breakdown – EU Missions (N= 1546)



## TRLs

In the position papers, the comments on the types of support mainly concerned the technology readiness levels (TRLs) targeted by the calls for proposals. Several universities and research organisations noticed a tendency in Horizon Europe to fund projects at higher TRLs under Pillar II. This tendency was seen negatively by most of the respondents, as there is a perceived gap between the fundamental research funded by the ERC and the very applied and innovation-oriented calls within Pillar II. In this regard, different research organisations, universities, but

also some public authorities recommended combining the thematic calls targeting high TRL under Pillar II with some calls targeting lower TRL research.

Box 6: Summary of the discussion held in the public event on the balance between low and high Technology Readiness Levels across Horizon Europe

- The discussion reaffirmed the findings of the public consultation and focused primarily on issues identified in Pillar II.
- First of all, participants appreciated the programme's emphasis on addressing the full TRL spectrum from basic research to market implementation with adequate instruments and resources.
- However, participants from business, academia and research organisations voiced concerns that the prevalence of calls for high TRL projects, including Research and Innovation Actions (RIA), acted as a barrier for researchers. This issue was observed across all clusters and Missions, hampering the ability to build a portfolio of basic research projects that would nurture future innovation.
- Participants emphasized the importance of covering the entire innovation cycle, including a better coverage of low TRL projects, and the need for structured synergies with other EU programs to facilitate funding and resource utilization for market uptake and commercialisation.
- Additionally, participants pointed to the importance of maintaining a balance between low, medium, and high TRL levels, supporting the full range of TRLs, and ensuring smooth transitions between different programs and pillars. It was noted that TRLs were often addressed in silos, leading to gaps within the program. Concerns were expressed because of the gaps between the European Research Council (ERC) and Marie Skłodowska-Curie Actions and calls for projects in Pillar II. A research organisation noted that the Pathfinder was considered a good example for integrating in a continuum the TRL spectrum, but its positioning within Pillar III was questioned.
- Concerns were expressed by research organisations about overly prescriptive project calls in Pillar II, lack of diversity in funding opportunities, and the potential negative impact on researchers' flexibility and participation.
- Another participant, taking into account EU policy that emphasize European competitiveness and strategy autonomy, highlighted the importance of focusing on mid-level TRLs to facilitate the deployment of pilots, testing, demonstrators, and scale-ups.
- At the same time, stakeholders acknowledged the significant progress made by Horizon Europe in integrating transdisciplinary approaches within clusters, which was positively received.
- Finally, some stakeholders from research organisations emphasised the limitations of the TRL concept for SSH advocating for more consideration of societal readiness in addition to technical aspects.

In their position papers, the respondents explained their concerns about the implementation of the EU Missions and the European Partnerships, summarised respectively in Box 5 and Box 6.

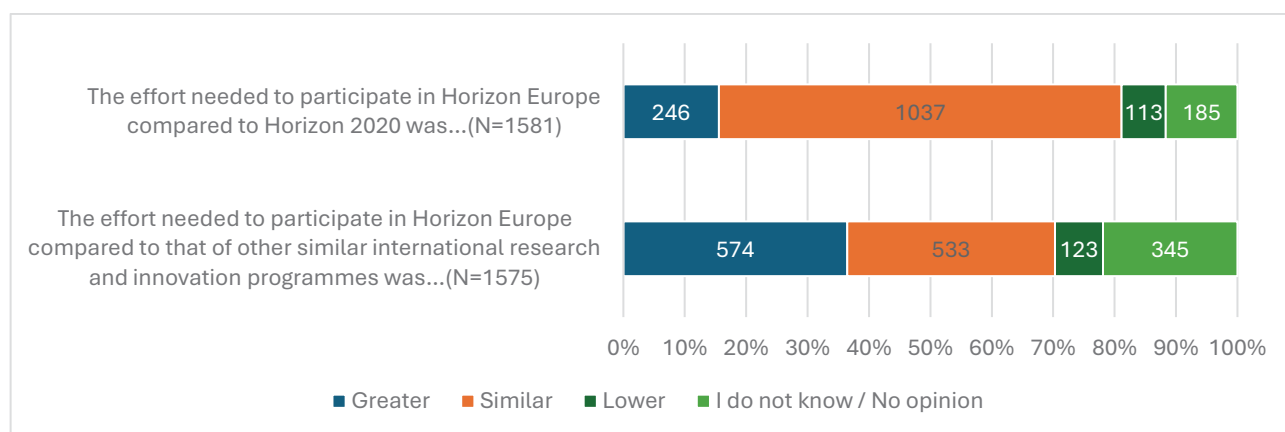


## Effort to participate in Horizon Europe

66% (1 037) of respondents maintained that “the effort to participate in Horizon Europe compared to Horizon 2020” was “similar”. According to 16% (246) of respondents it was greater and for 7% (113) it was lower. A relatively larger share of respondents from Associated Countries and Third Countries indicated that the effort was “greater” than from EU14 or EU13. Among the different types of respondents, the effort needed to participate in Horizon Europe was perceived as “greater” both compared to Horizon 2020 and to other programmes especially by academic and research institutions.<sup>218</sup> The effort to participate in Horizon Europe was usually deemed greater (36%; 574) or similar (34%; 533) to other research and innovation programmes. Only 8% (123) of respondents thought it was lower.

Although many respondents acknowledged the simplification efforts put in Horizon Europe<sup>219</sup>, the participation in Horizon Europe was still considered too burdensome and the position papers pointed out some room for improvement<sup>220</sup>. A few papers have highlighted the additional requirements linked to the cross-cutting issues (e.g., the Gender Equality Plan), which have further increased the costs of proposal preparation.

Figure 74: The effort needed to participate in Horizon Europe compared to Horizon 2020 and other similar international programmes was:



<sup>218</sup> The results of the analysis differentiating by type of respondent and by geographical area are reported in Table 27, Table 28, Table 29 and Table 30 - additional statistics.

<sup>219</sup> For example through the Funding & Tender portal, the standard template for proposal preparation, the introduction of simplified financing (e.g., lump sum), simplified procedures for Grant Agreement preparation and reporting.

<sup>220</sup> 50 position papers discussed issues related to the costs of participation, simplification efforts and administrative burden. The main messages are in line with the ones presented in the previous sections on proposal preparation and project implementation.

Figure 75: Breakdown by country – Effort to participate compared to Horizon 2020 (N= 1581)

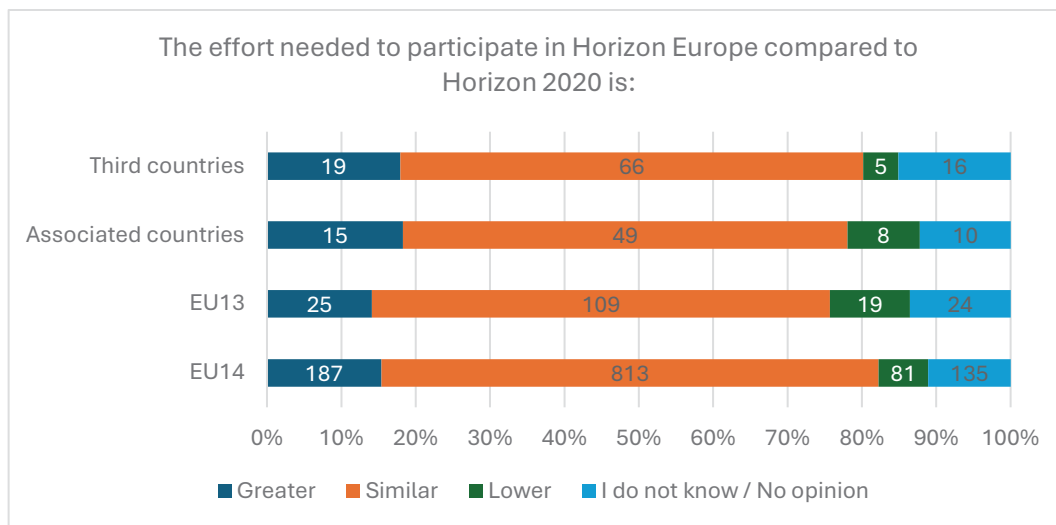


Figure 76: Stakeholder breakdown – Effort to participate compared to Horizon 2020 (N= 1581)

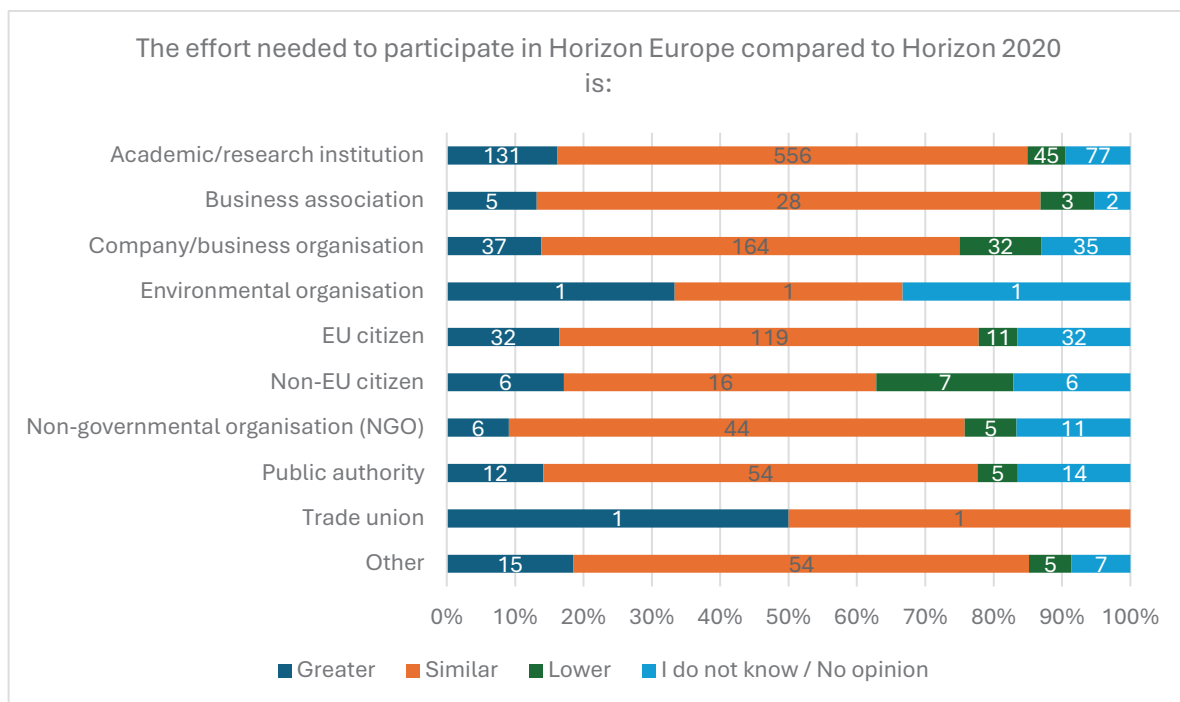


Figure 77: Breakdown by country – Effort to participate compared to other programmes (N= 1575)

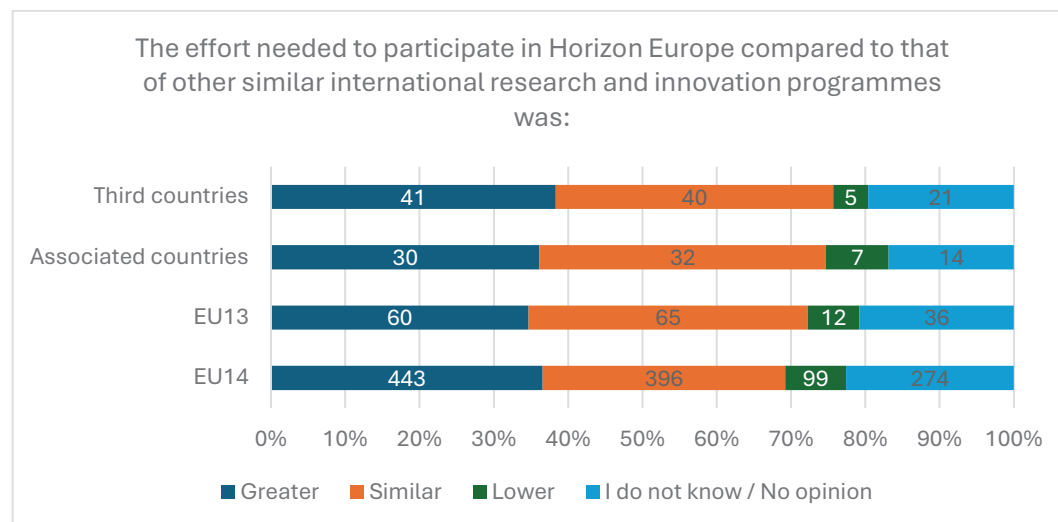
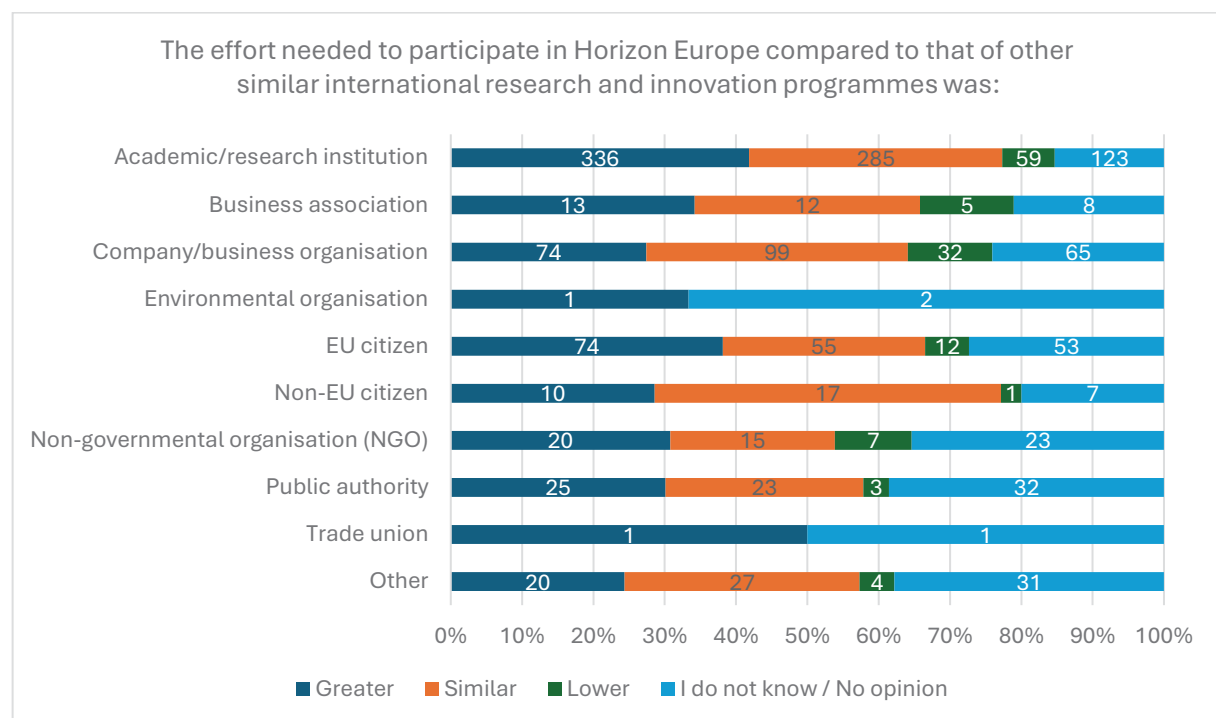


Figure 78: Stakeholder breakdown – Effort to participate compared to other programmes (N= 1575)



## Costs of proposal preparation

A majority (52%; 744) of the respondents declared that their “proposal preparation for Horizon Europe” took overall less than 50 days, 34% (483) more than 50 but less than 100 days and 15% (213) more than 100 days.<sup>221</sup>

Figure 79: Approximately, how much time did the proposal preparation for Horizon Europe take overall? Please indicate the total number of person-days. (N= 1 663)

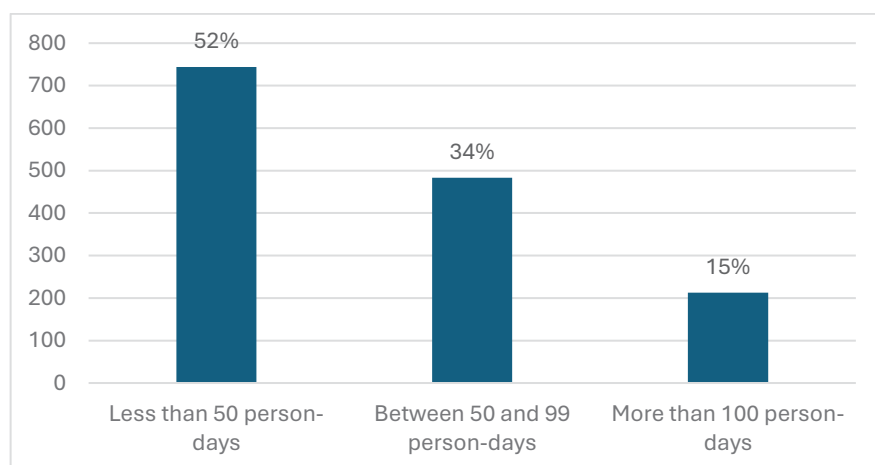
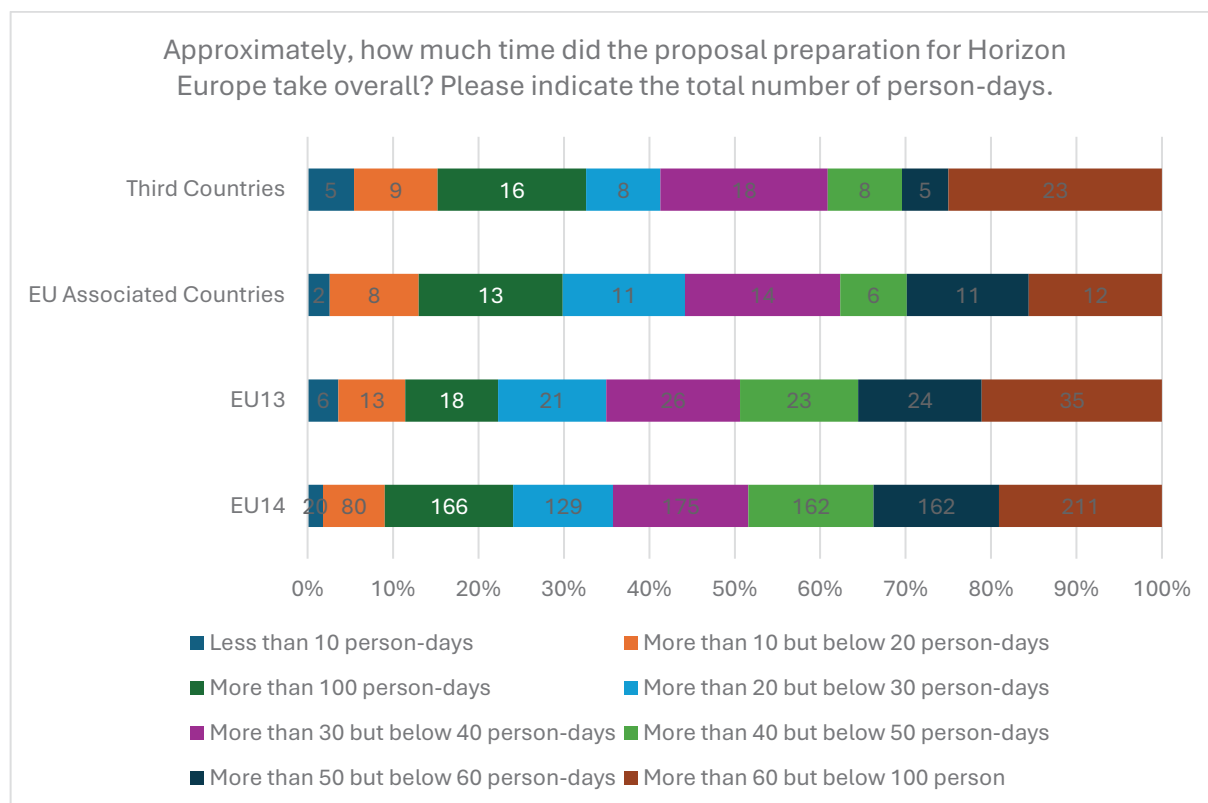
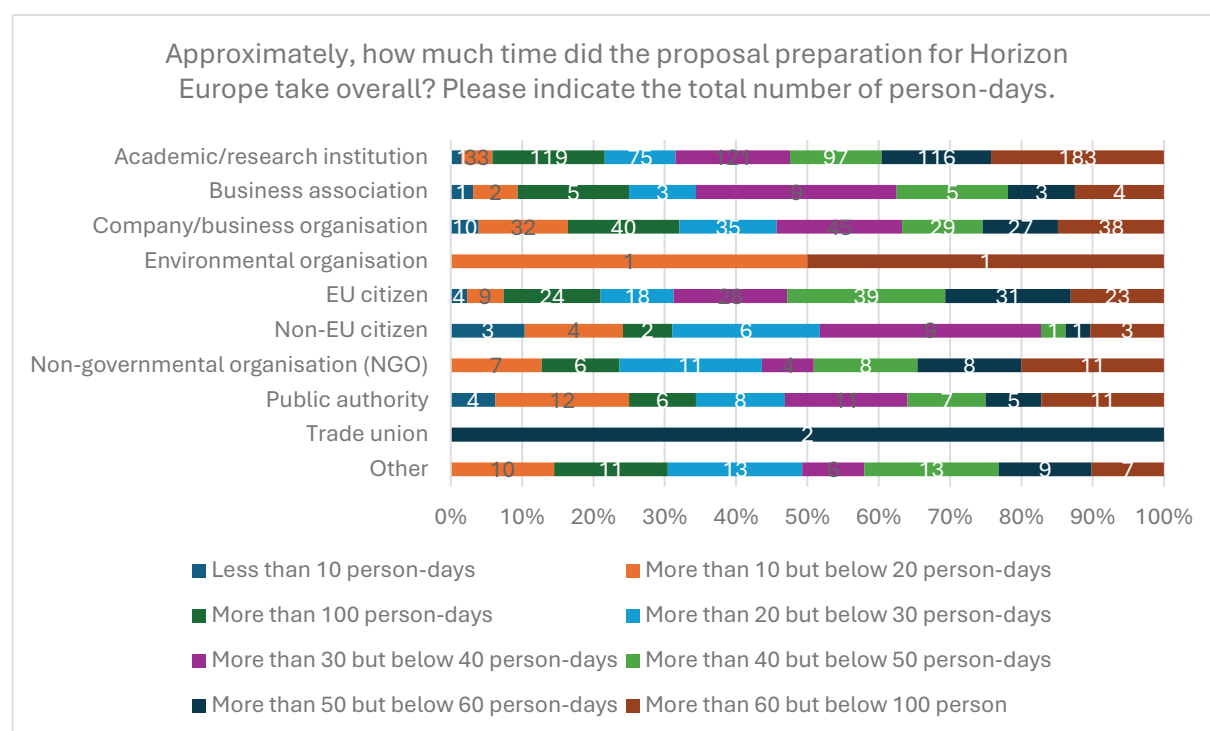


Figure 80: Breakdown by country group – Total number of person-days (N= 1663)



<sup>221</sup> The results of the analysis differentiating by country group and type of respondent and by geographical area are reported in Table 31 and Table 32 - additional statistics.

Figure 81: Stakeholder breakdown – Number of person-days (N= 1663)



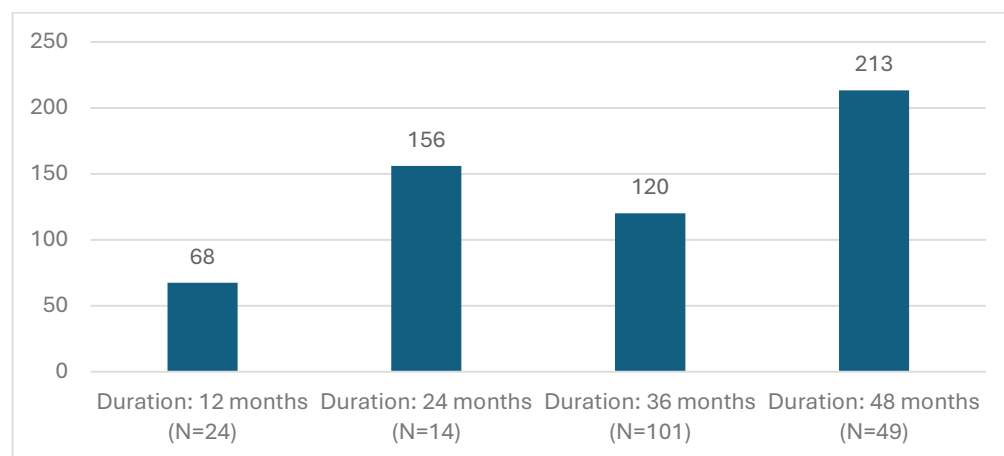
## Managing participation in Horizon Europe

The consultation also asked participants about the “time spent managing participation”. The analysis of responses cannot be conclusive because there is great variability in the responses in terms of who provided information or not, which programme parts the respondents were linked to and their specific role in the projects.<sup>222</sup>

The chart below shows the information provided on “average number of person-days spent during the entire project”, by project duration.

<sup>222</sup> For example, among projects with a duration of 36 months, the estimates range from 5 person-days to 750 person-days.

Figure 82: Approximately, how much time does your project spend on managing participation in Horizon Europe? Total number of person-days spent overall on managing participation. Average estimate of person-days by project duration (N= 188)



The answers to the open question “Approximately, how much time does your project spend on managing participation in Horizon Europe?” can only be interpreted with caution because of the following:

- 342 responses could not be processed because respondents did not provide the required information: they could not provide an estimate or when they did it was not in the required format.
- Comparability is difficult because respondents interpreted the question in different ways (e.g., some respondents included in the estimate the time spent for the internal project coordination, others provided an estimate of the time that it took for the whole project activities).
- The resources spent on managing participation largely depended on the type of action (i.e., Research & Innovation Action or Coordination and Support Action) or the role of the respondent in the project (i.e., coordinator or partner), and the project size.

Suggestions on how administrative burden for applicants and participants can be further reduced are related to simplifying the application and submission process (including the process to amend the proposal), reducing the reporting requirements, increasing flexibility in accepting different time management measurements as well as accounting practices, creating a simplified contractual framework and reduced models for calculating costs and accounting, implementing two-staged application processes to reduce the burden of the application, and eliminating the repeating parts in the project proposal templates.<sup>223</sup>

## Progress towards achieving Horizon Europe objectives

### Assessing the achievement of Horizon Europe objectives

The majority of respondents “agreed” or “strongly agreed” that “Horizon Europe was on track to deliver” its objectives.

<sup>223</sup> 830 respondents answered the open question “How can the administrative burden for applicants and participants be further reduced (regarding application process, reporting requirements, cost calculation etc.)?”



Figure 83: To what extent do you agree that Horizon Europe is on track to deliver on the following objectives

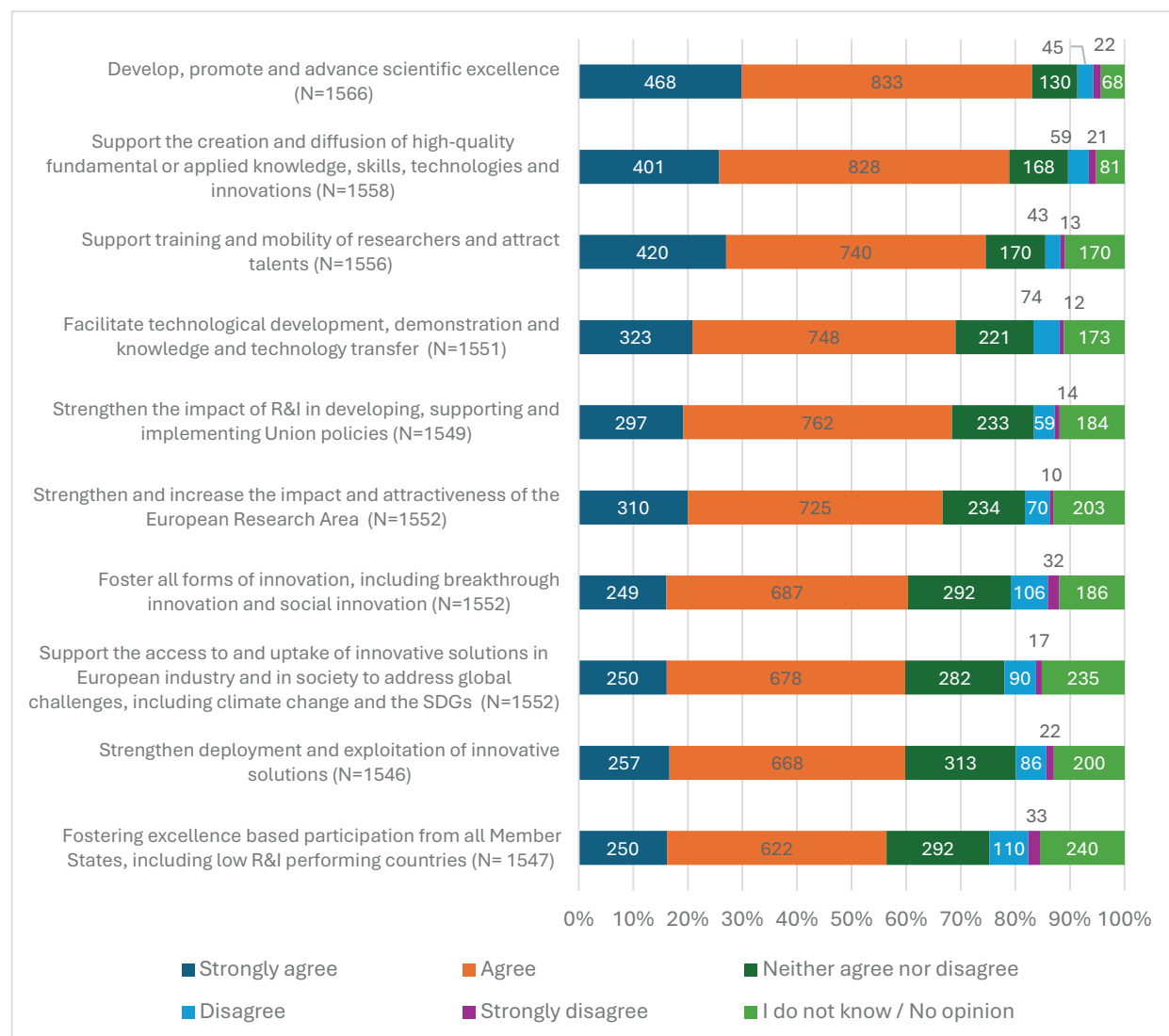


Figure 84: Stakeholder breakdown – Develop, promote and advance scientific excellence (N= 1566)

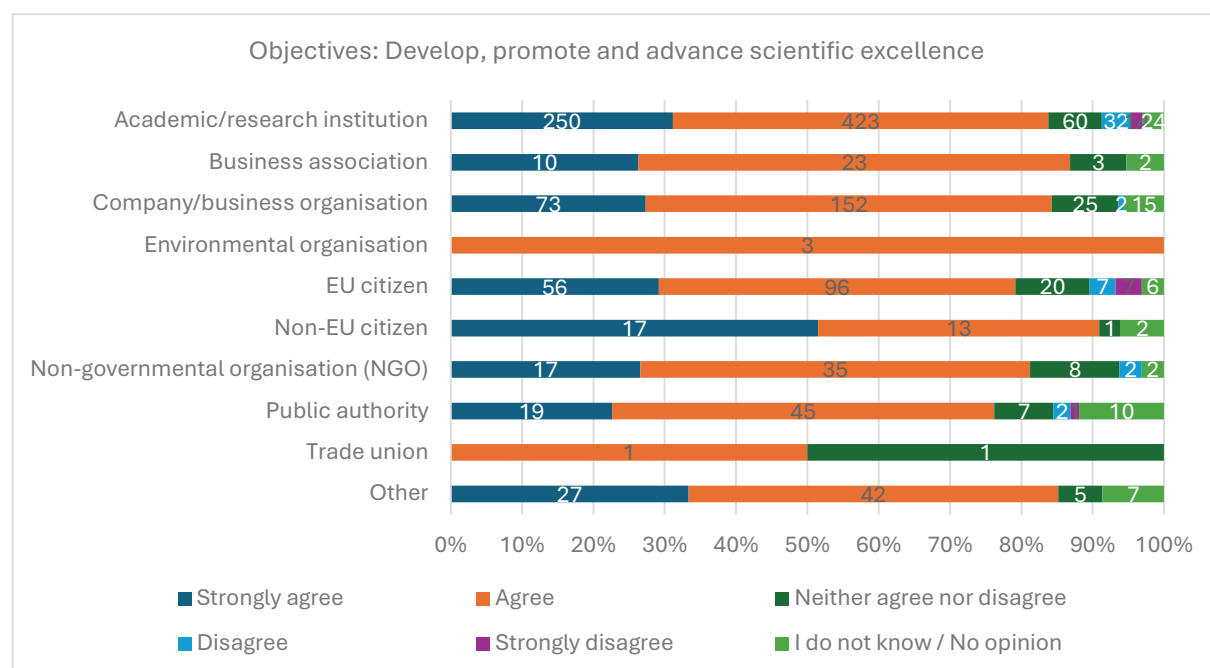


Figure 85: Stakeholder breakdown – Support the creation and diffusion of high-quality fundamental or applied knowledge, skills, technologies and innovations (N= 1558)

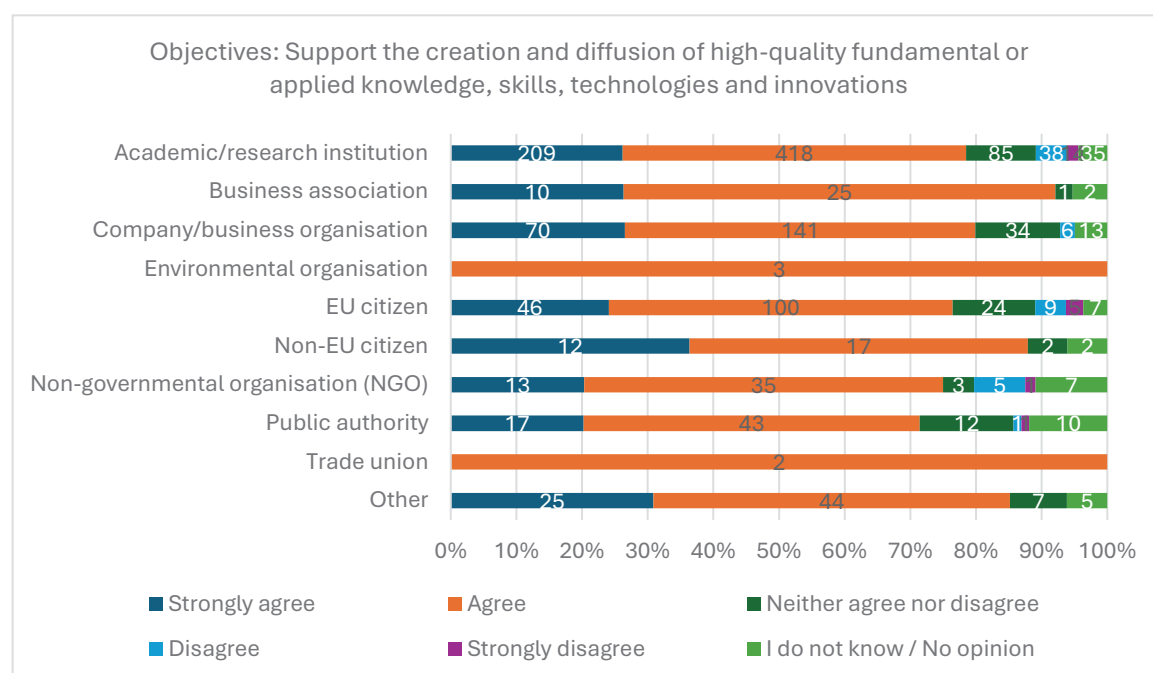


Figure 86: Stakeholder breakdown – Support training and mobility of researchers and attract talents (N= 1556)

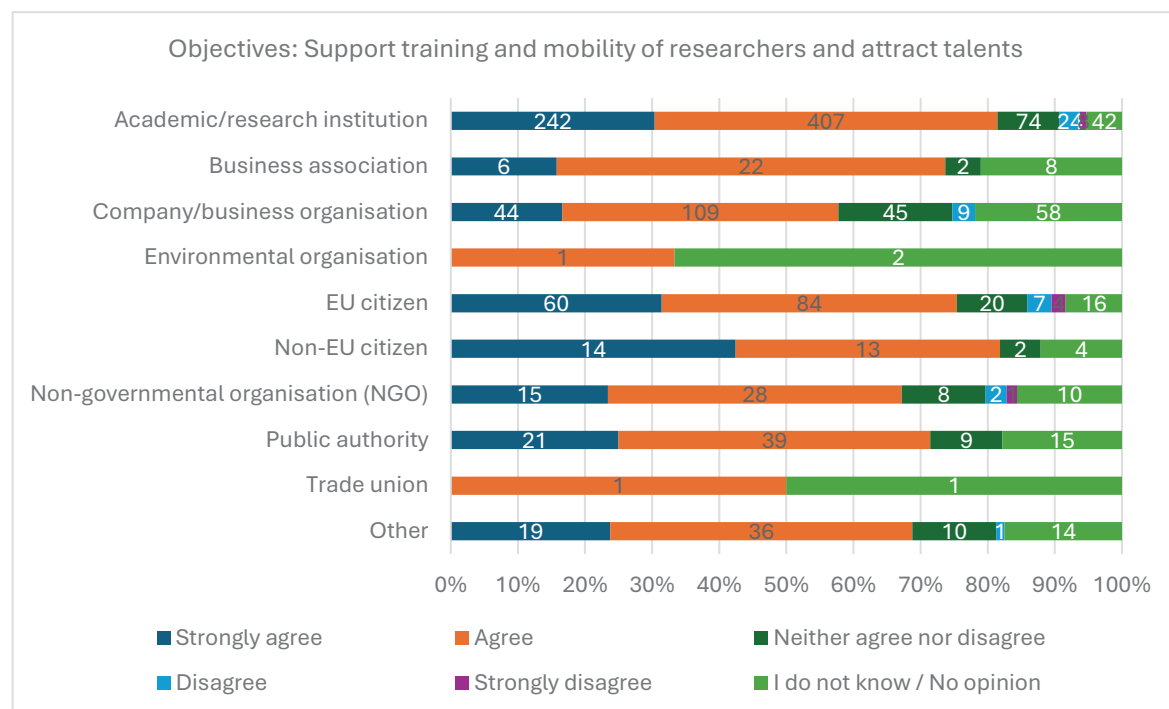


Figure 87: Stakeholder breakdown – Strengthen the impact of R&I in developing, supporting and implementing Union policies (N=1549)

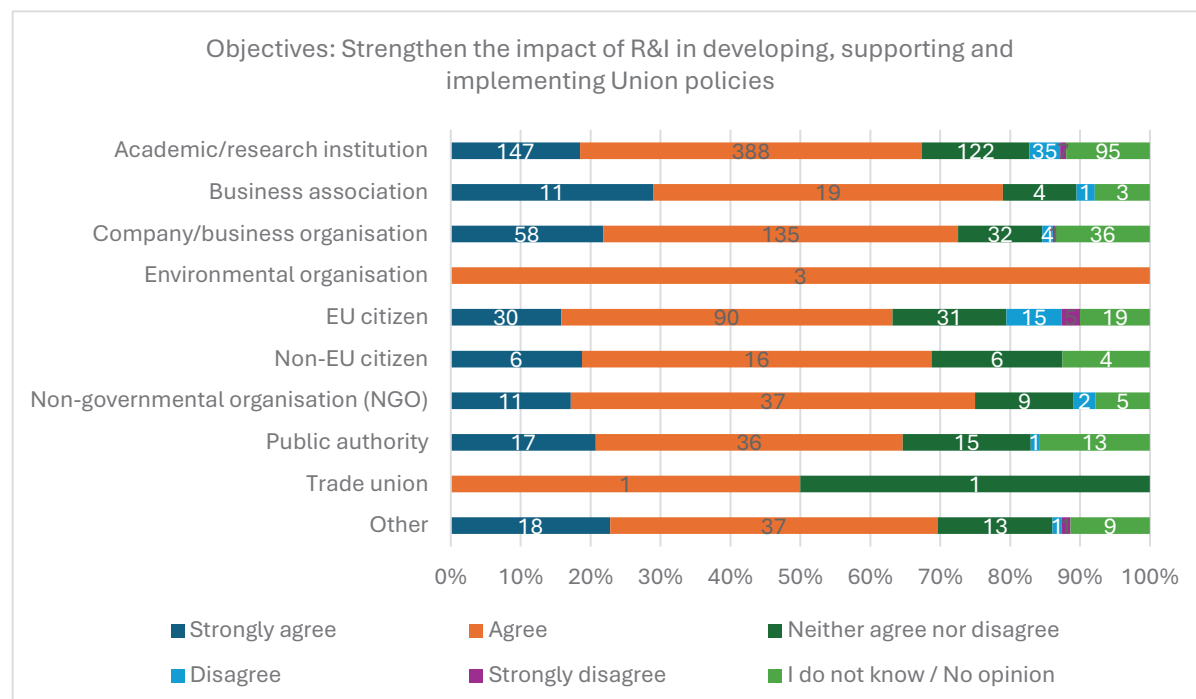


Figure 88: Stakeholder breakdown – Support access to and uptake of innovative solutions in European industry and in society to address global challenges including climate change and the SDGs (N= 1552)

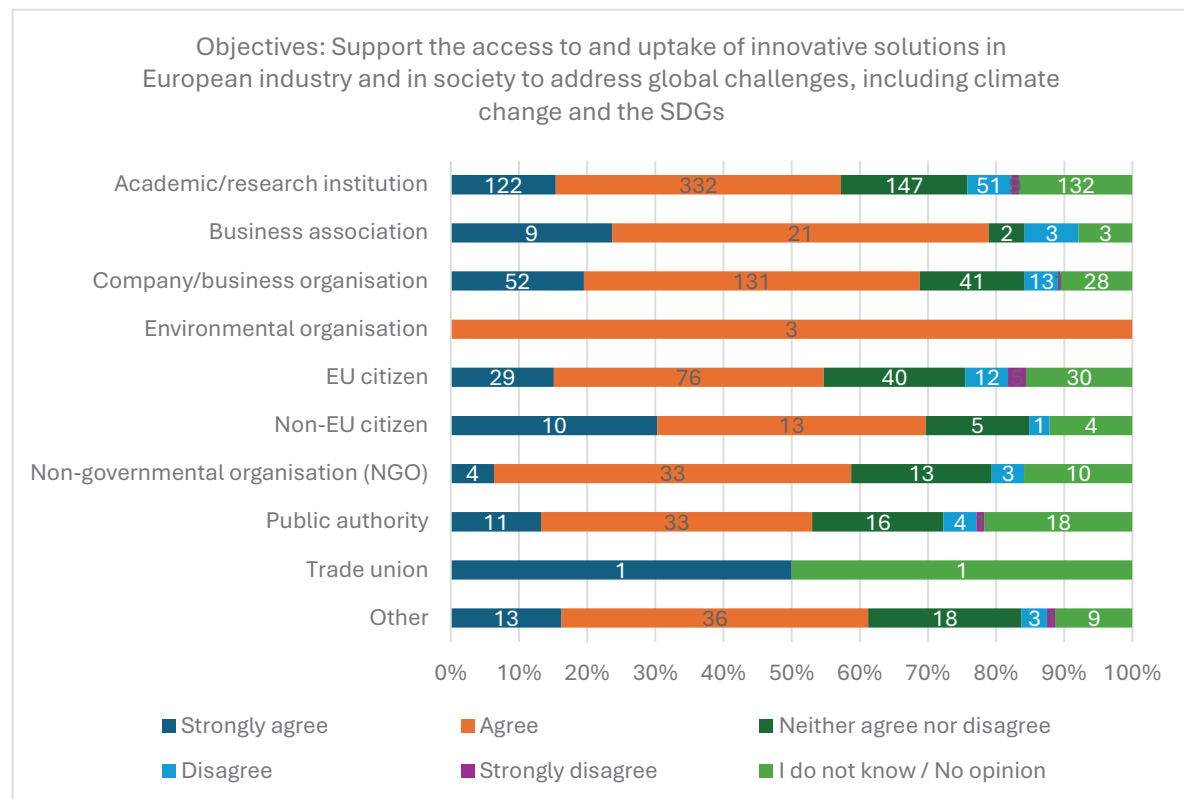


Figure 89: Stakeholder breakdown – Foster all forms of innovation including breakthrough innovation and social innovation (N= 1552)

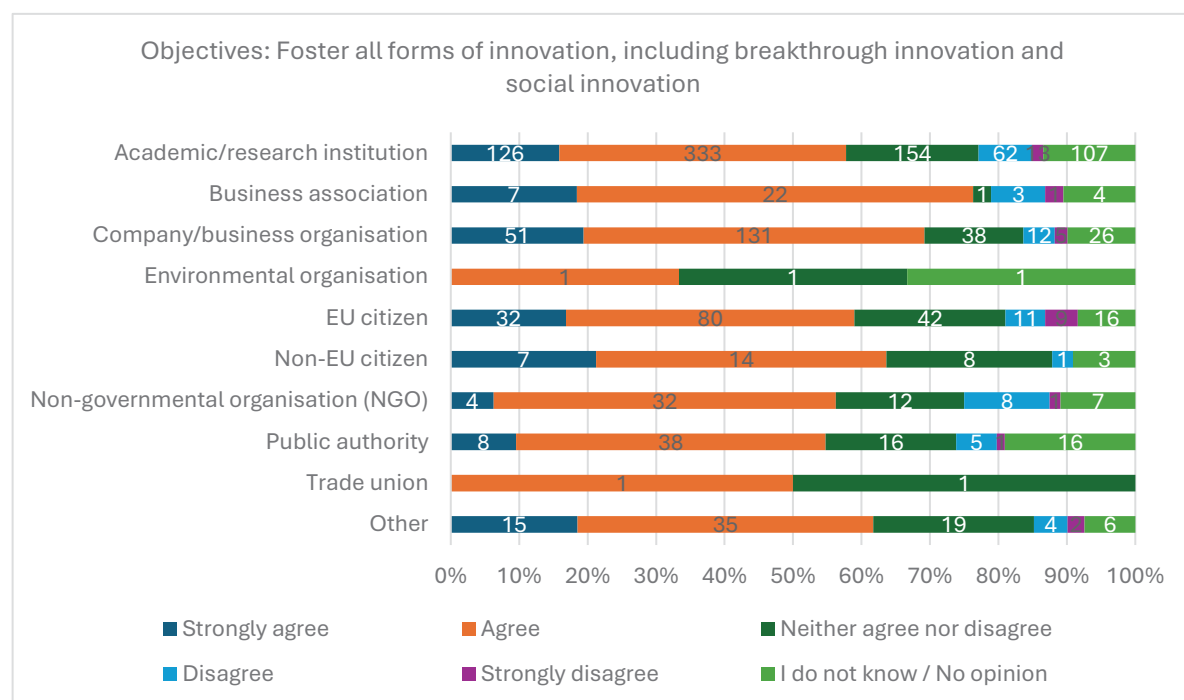


Figure 90: Stakeholder breakdown – Facilitate technological development, demonstration and knowledge and technology transfer (N= 1551)

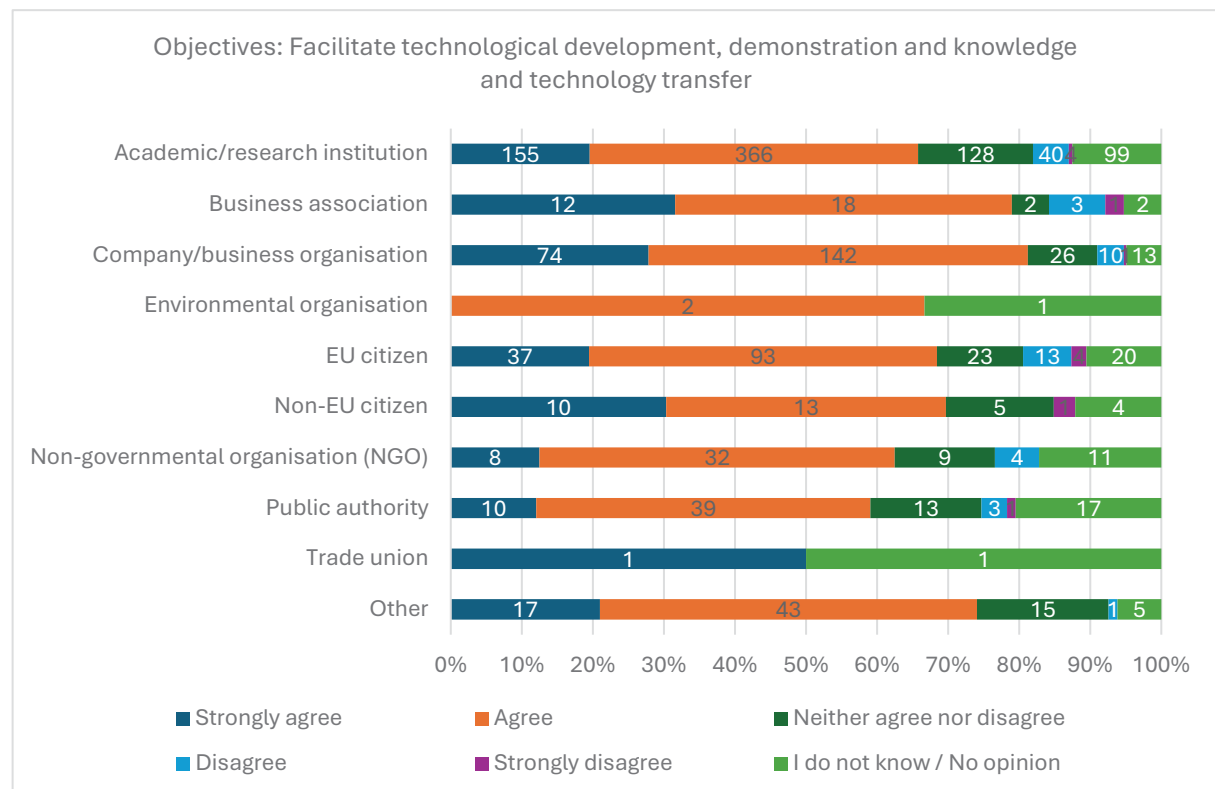


Figure 91: Stakeholder breakdown – Strengthen deployment and exploitation of innovative solutions (N= 1546)

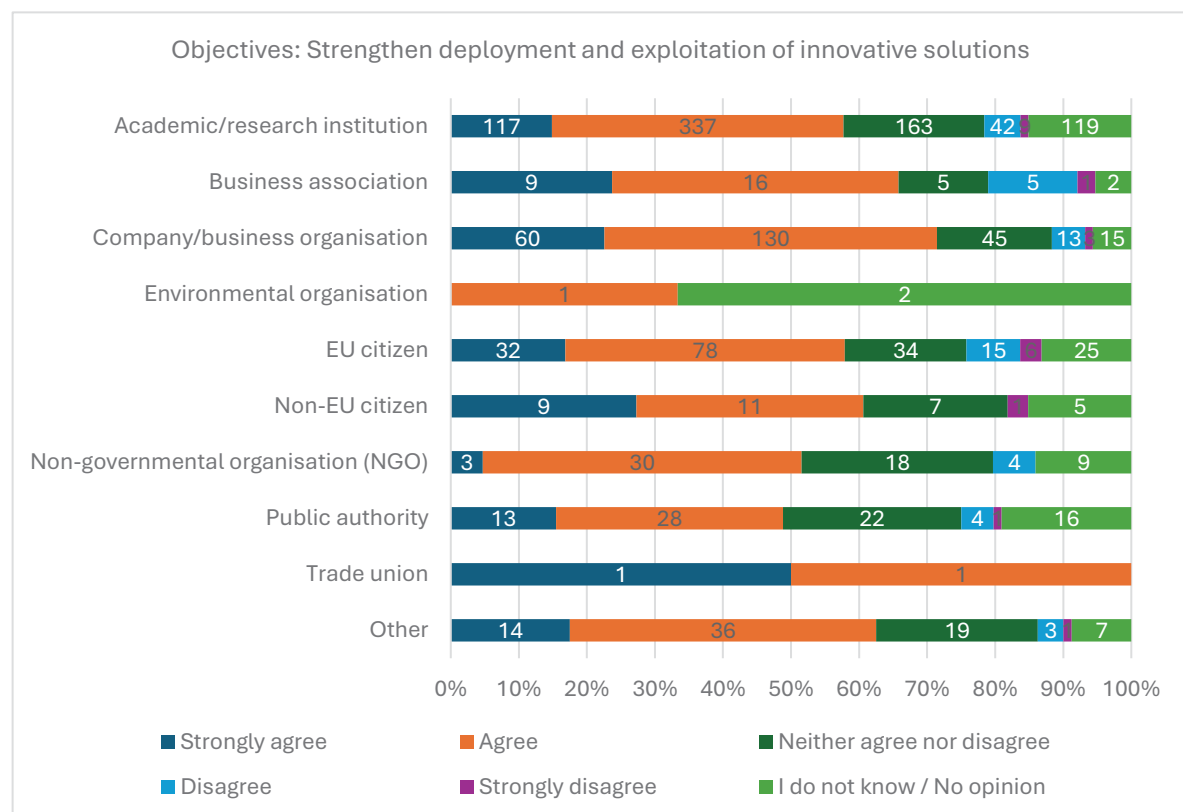


Figure 92: Stakeholder breakdown – Strengthen and increase impact and attractiveness of the European Research Area (N= 1552)

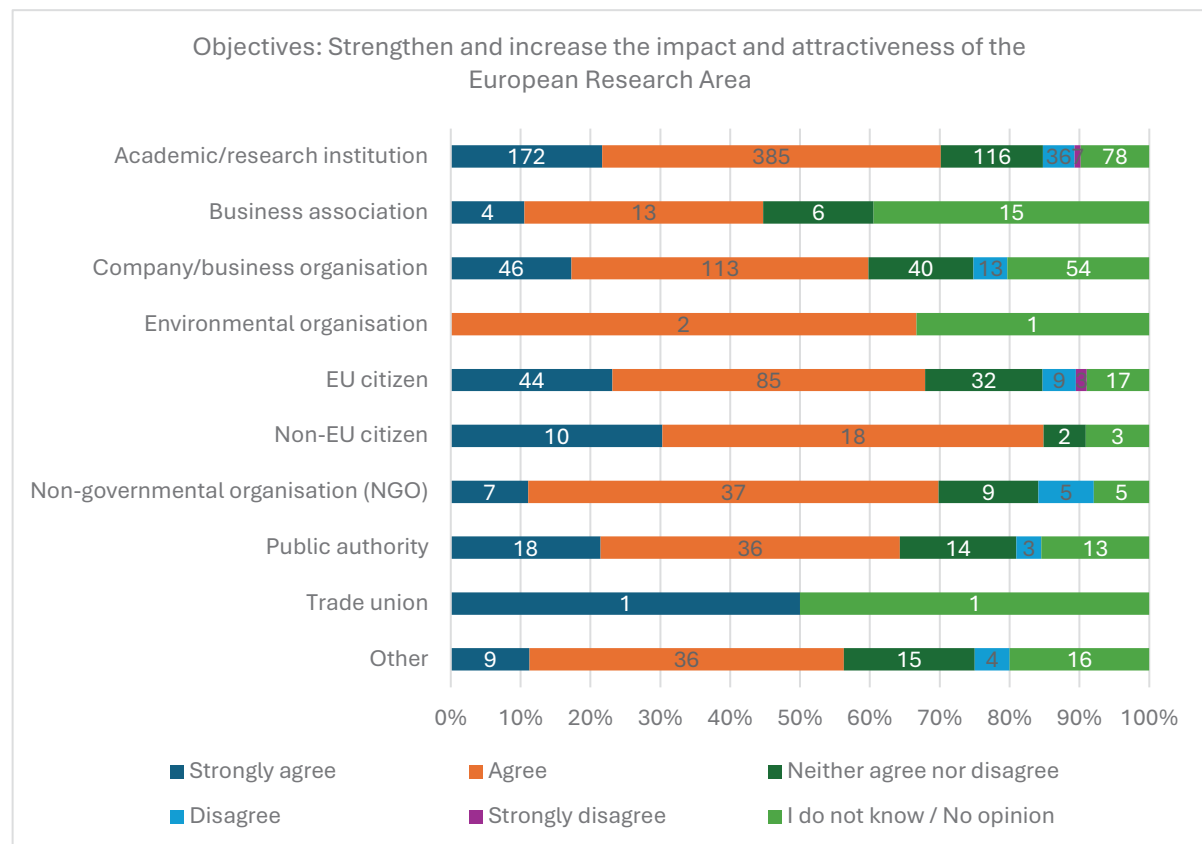
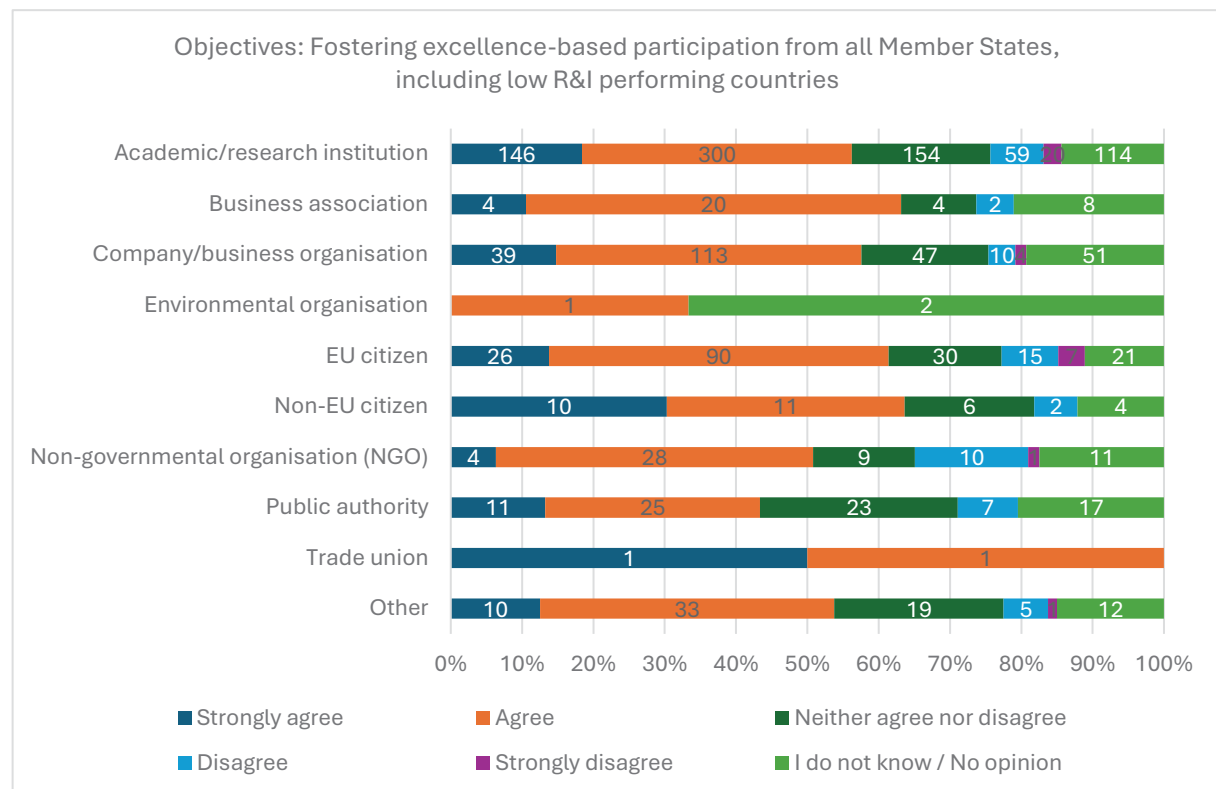




Figure 93: Stakeholder breakdown – Fostering excellence-based participation from all Member States, including low R&I performing countries (N= 1547)



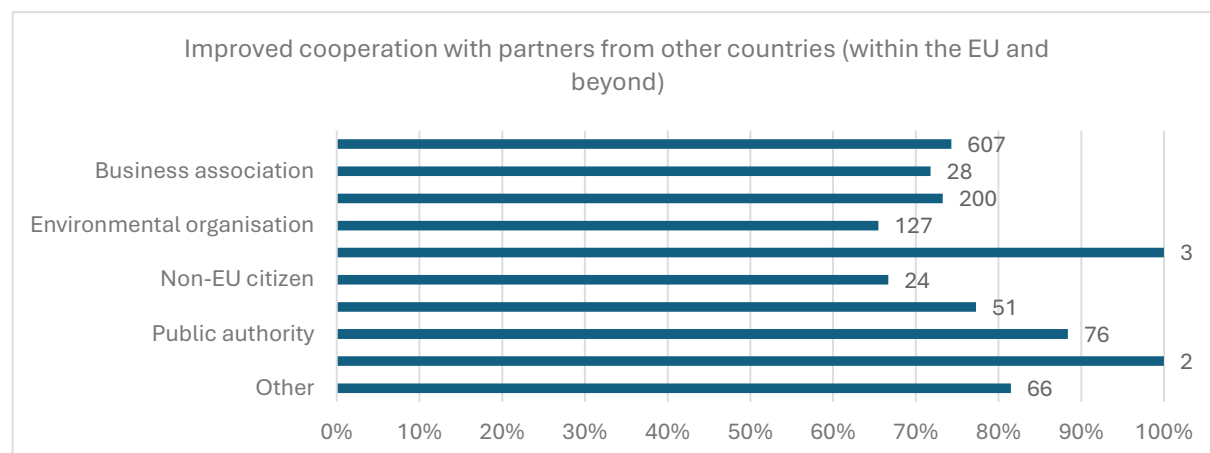
## Cross-cutting issues

Please find below additional breakdowns regarding the cross-cutting objectives of Horizon Europe, along with aspects highlighted in the position papers.

### International cooperation

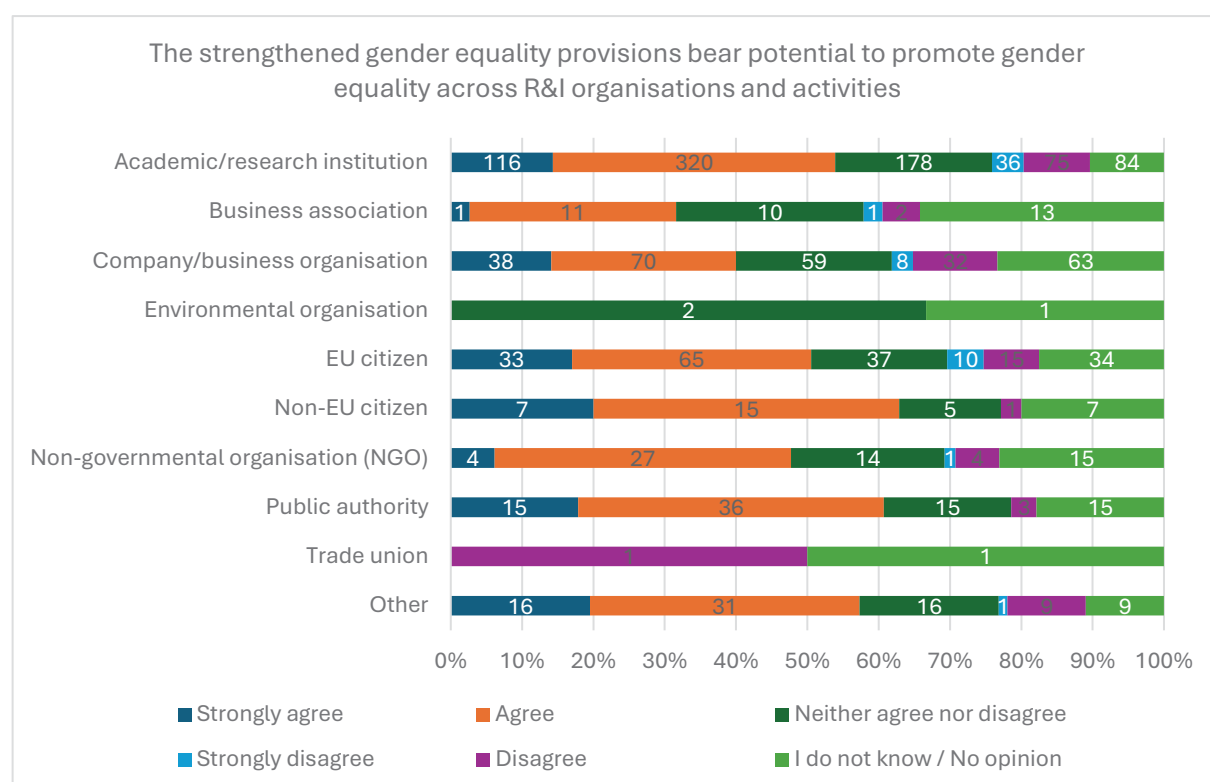
35 position papers discussed international cooperation. They pointed to the benefits of international collaboration for EU research and innovation because it allows access to more talents, resources and knowledge. Stakeholders also considered that the non-association of Switzerland and the UK, and uncertainty about the status of non-EU countries, has thus far limited the ability of consortia to work with international partners.

Figure 94: Stakeholder breakdown – Improved cooperation with partners from other countries within the EU and beyond (N= 1597)



## Gender equality

Figure 95: Stakeholder breakdown – Gender equality provisions bear potential to promote gender equality across R&I organisations and activities (N= 1581)



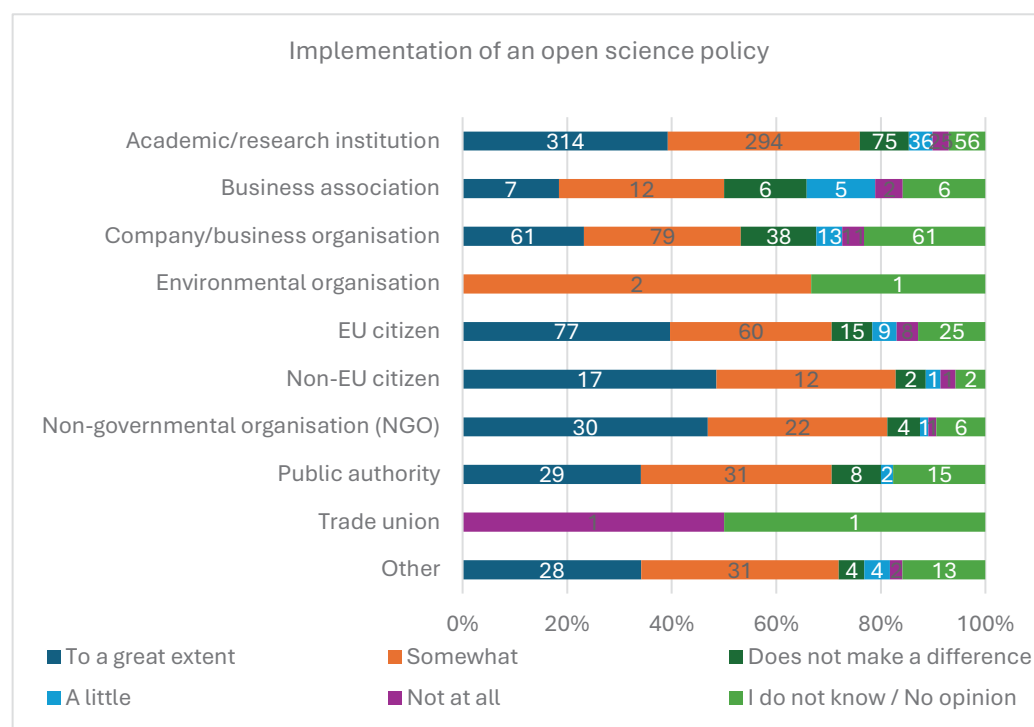
16 position papers discussed the gender cross-cutting issue. Stakeholders welcomed the introduction of the Gender Equality Plan (GEP) as an important step for addressing gender inequalities, whereas they remained more sceptical about the requirement to complete the Researcher Table. Stakeholders also considered that without post-award monitoring, there is no guarantee that the GEP and the Researcher Table translate in concrete actions.

## Open science

21 position papers discussed open science. Open science received strong support from research organisations. However, they also considered that to fully achieve the objectives of Open

Science, more guidance and dedicated resources are needed, along with progress within national policy frameworks.

Figure 96: Stakeholder breakdown – Implementation of an open science policy (N= 1566)



## Social Sciences and Humanities

36 position papers discussed social sciences and humanities (SSH) in Horizon Europe. Stakeholders acknowledged the progress made in integrating SSH expertise into Horizon Europe, in particular through a dedicated cluster in Pillar II, but they also raised concerns about the lack of systematic involvement of SSH researchers upstream in work programme and call preparation across all clusters. Stakeholders considered that SSH research involvement was an important, yet not fully exploited, driver of interdisciplinarity across the various intervention areas of Horizon Europe. A number of position papers by research organisations also emphasised that SSH researchers found it challenging to identify funding opportunities and blamed what they considered the overly prescriptive nature of the work programmes, the application of the TRL scale, and the insufficient SSH expertise in evaluators and evaluation panels.

## Widening

19 position papers (all from academia and public authorities) discussed widening issues. Stakeholders emphasised the significance of continued support for widening actions in Horizon Europe. They highlighted the success of instruments such as Teaming for Excellence, ERA Chair, and Twinning, while they pointed to some issues in the new Hop-On scheme (implementation and partner selection). Stakeholders also considered that the reasons for low engagement from widening countries appeared to be largely systemic. They advocated to leverage budget from other EU programmes like the European Regional Development Fund (ERDF) and NextGeneration EU to structurally invest in R&I and reduce territorial unbalances.

According to the stakeholders participating in the public event, the integration of cross-cutting and horizontal aspects (e.g., SSH disciplines, gender issues, multi-actor approach) is highly positive and beneficial for the research projects, in line with the Responsible Research &

Innovation (RRI) principles, which are fundamental for the value of scientific results. However, some applicants claim that the call for proposals' text is not always clear on how those cross-cutting aspects should be integrated in the research activities. This may lead to increased time for the preparation of the proposal and a “just-tick-the-box” effect.

### Effectiveness of the EU Missions and European Partnerships

Participants in the public event considered the long-term objectives and possible synergies under the EU Missions as very positive aspects that boost innovation possibilities. Missions are particularly appreciated by public authorities for providing them with scientific inputs to address local challenges. However, participants from different stakeholder categories (from business support organisations, National Contact Points and public authorities) recognised that often targeted stakeholders do not have a clear understanding of the EU Missions. For example, local authorities (typically regions) have little information about the Missions' calls and implementation. In general, the involvement of stakeholders from different fields of activities and levels of governance was considered a key aspect to be improved.

After excluding the responses of those who selected “I do not know”, respectively 52% (461) and 50% (485) of respondents “agreed” or “strongly agreed” that “the implementation so far of EU Missions is on track to deliver on their objectives” for the EU Missions on “Climate-neutral and smart cities” and “Adaptation to climate change”. For the other EU Missions this percentage was between 40% (A Soil Deal for Europe; 257) and 45% (Prevention, cure and solutions for cancer; 312). The share of respondents who “disagreed” or “strongly disagreed” ranged between 18% (Prevention, cure and solutions for cancer; 122) and 25% (Restoring healthy oceans, seas, coastal and inland waters; 190).

Figure 97: To what extent do you agree that the implementation so far of EU Missions is on track to deliver on their objectives?

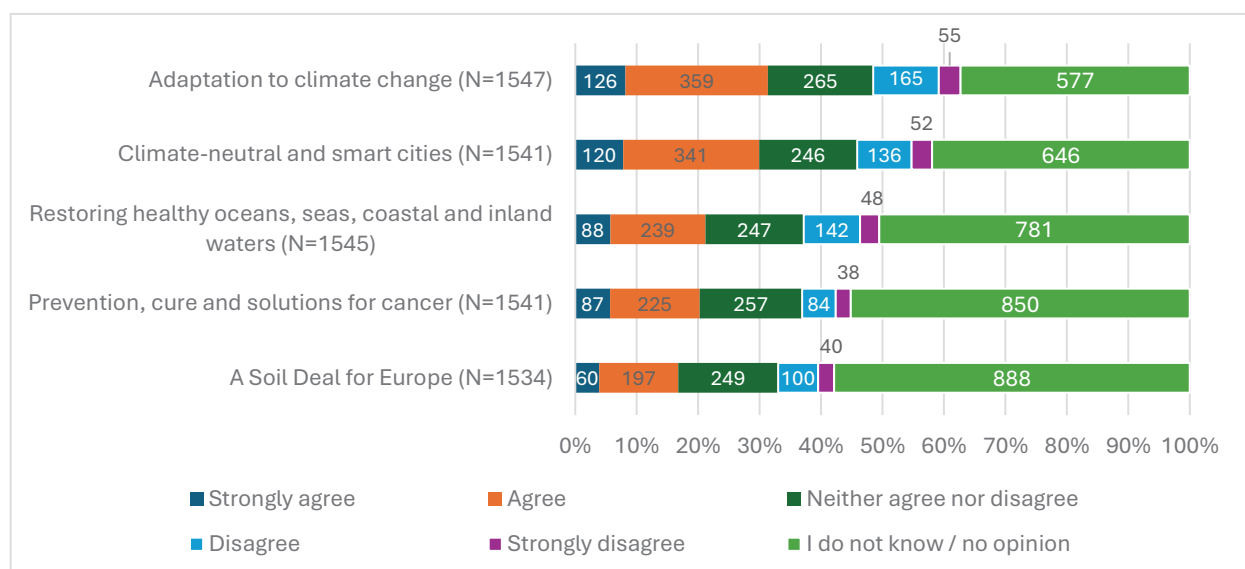


Figure 98: Stakeholder breakdown - Adaptation to climate change (N= 1547)

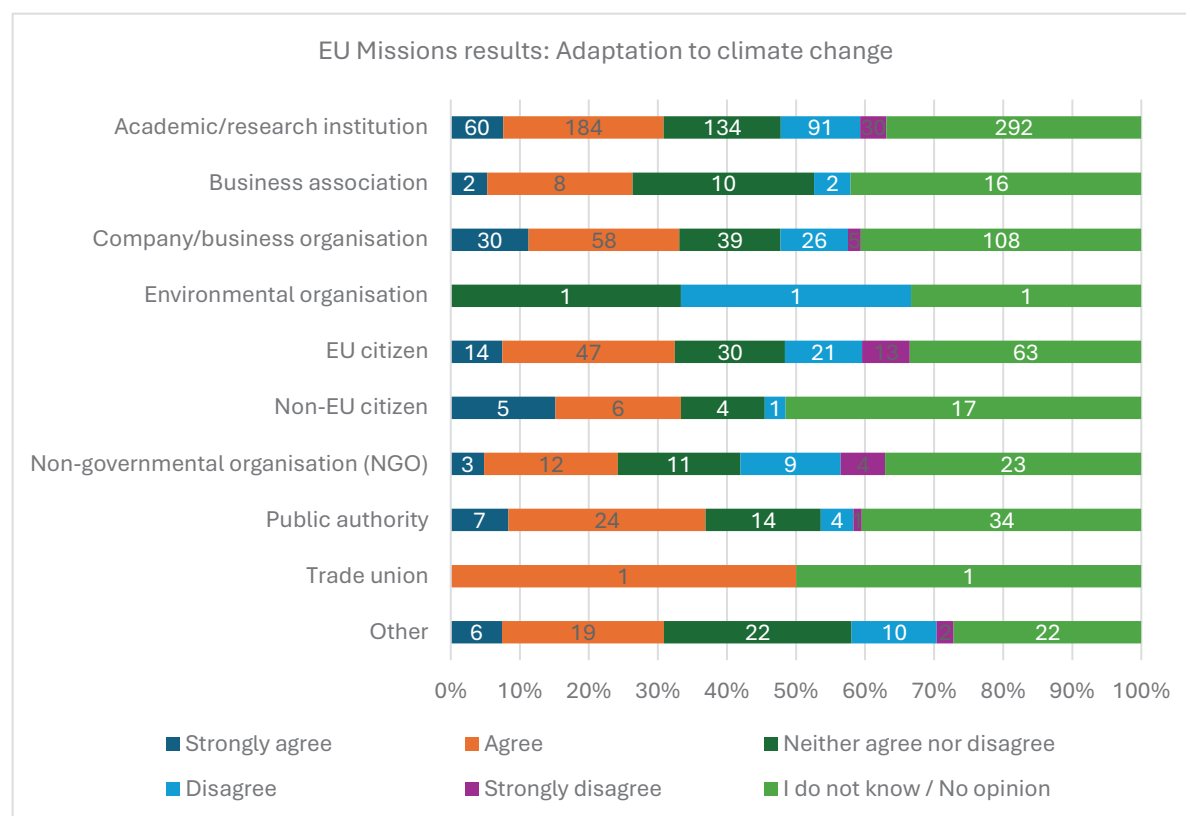


Figure 99: Stakeholder breakdown - Mission Cancer (N= 1541)

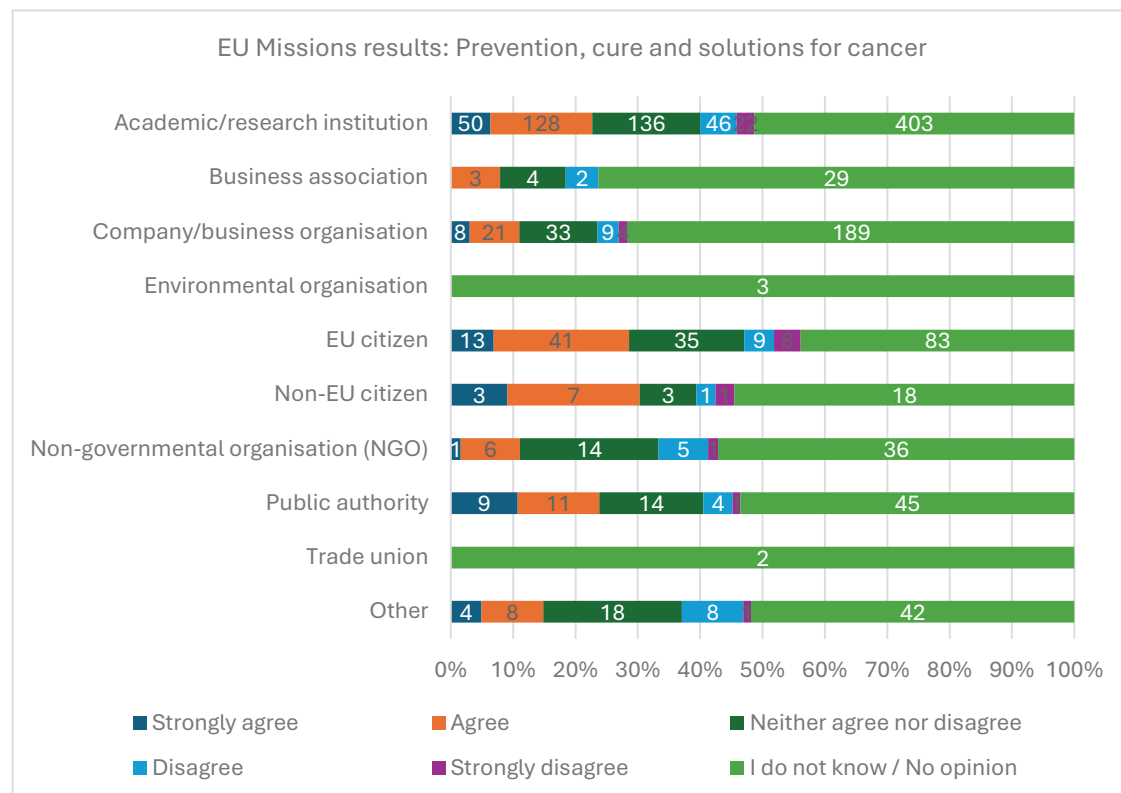


Figure 100: Stakeholder breakdown – Mission Oceans (N= 1541)

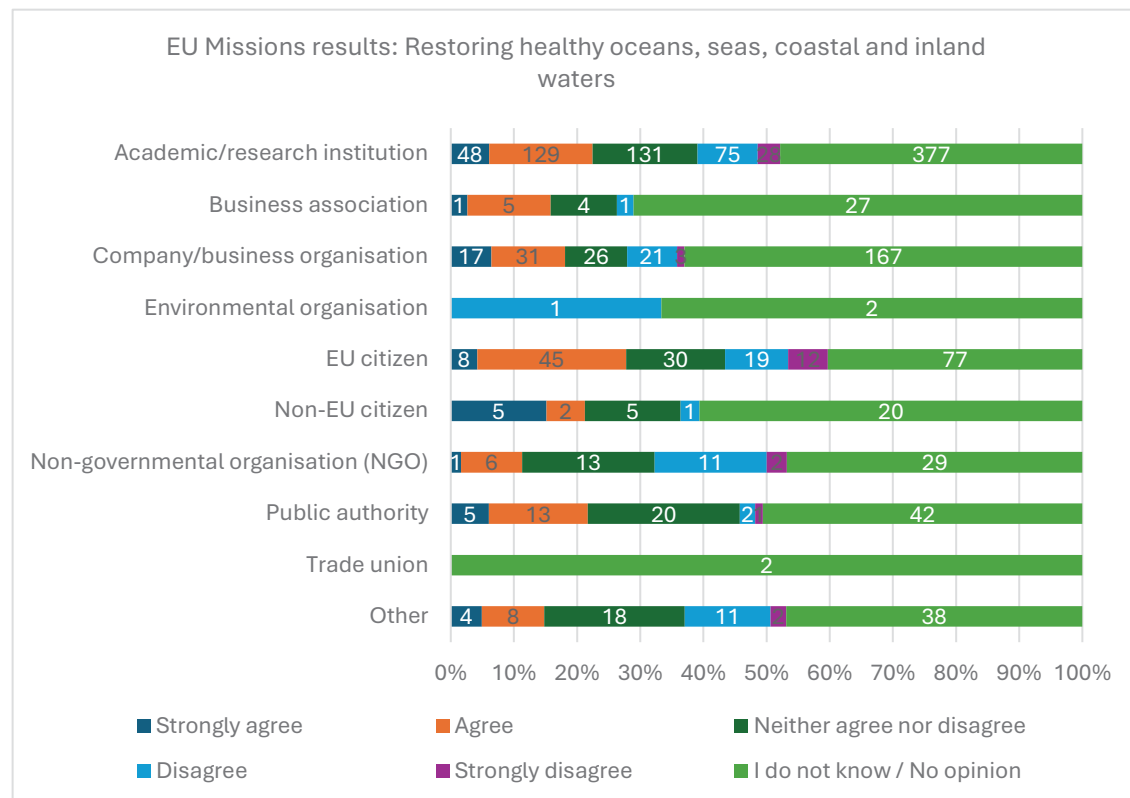


Figure 101: Stakeholder breakdown – Mission cities (N= 1541)

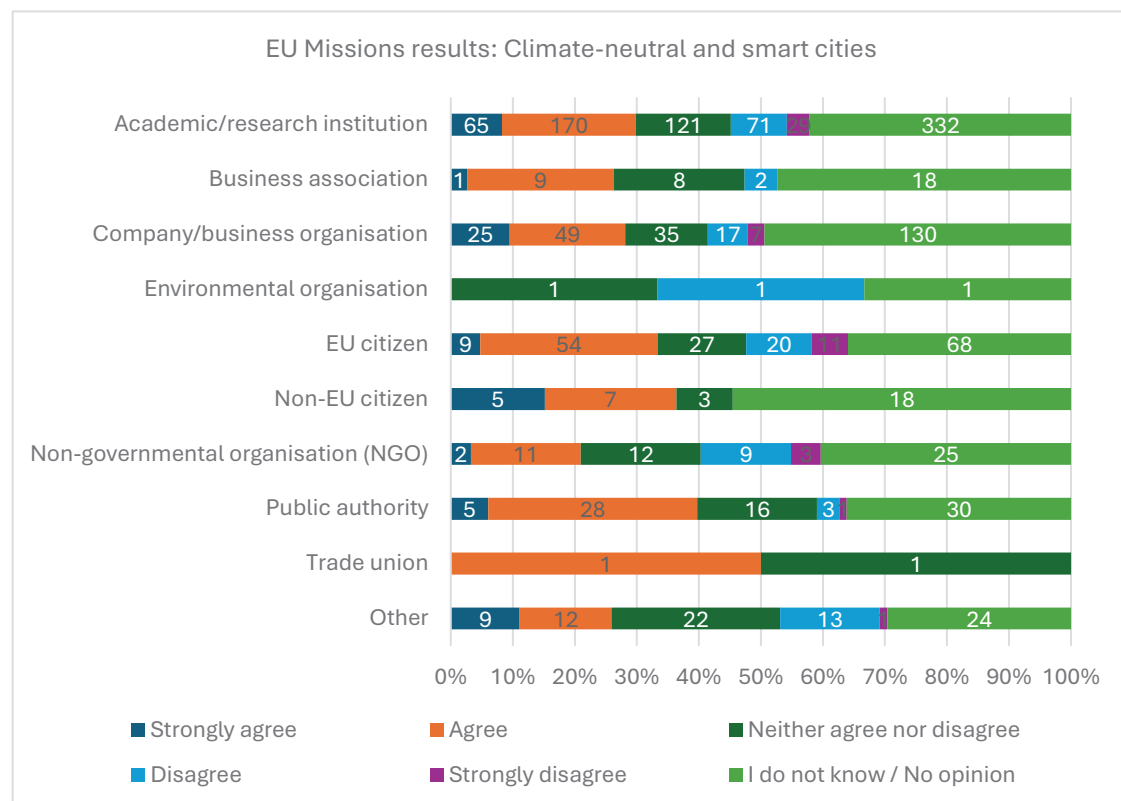
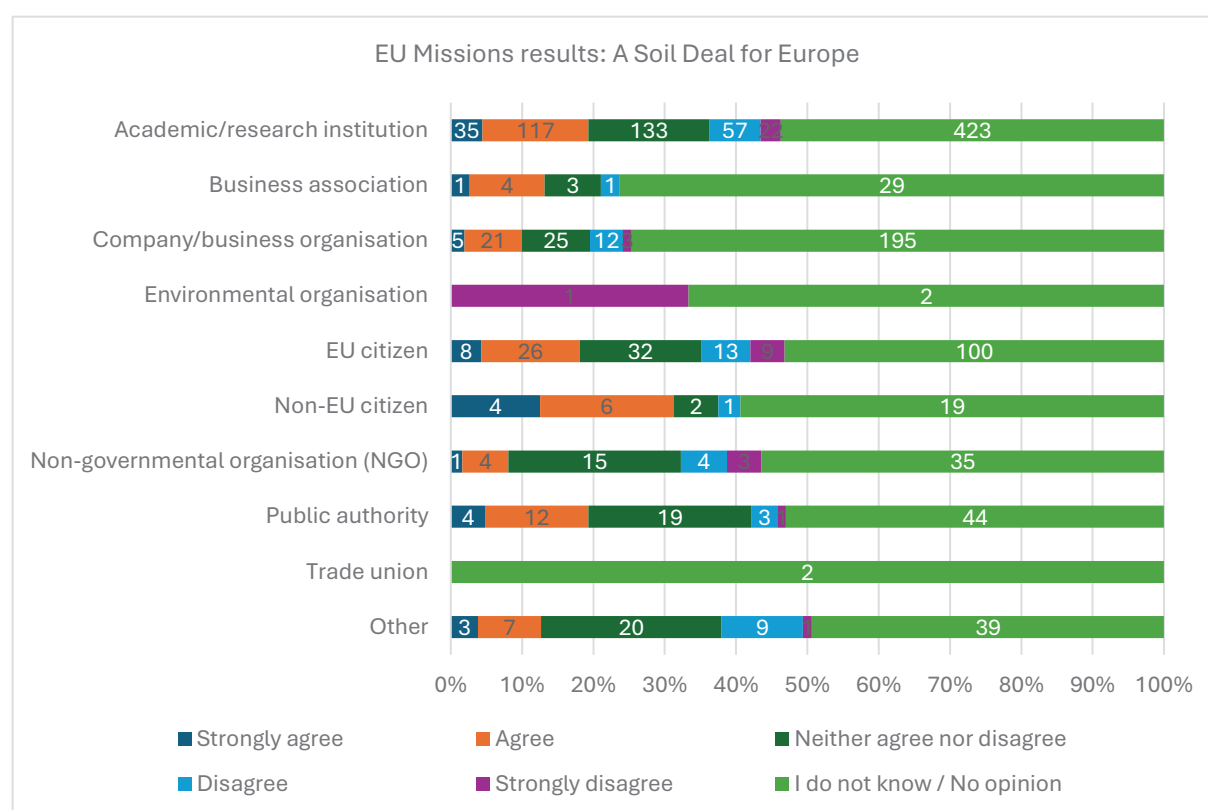




Figure 102: Stakeholder breakdown – Mission Soil (N= 1534)



#### Box 7: Specific comments on the EU Missions

##### 43 position papers included comments on the EU Missions.

Whilst several stakeholders embraced the concept of the EU Missions, they pointed out some implementation issues, which may jeopardise the achievement of their objectives. In addition, some have noticed that the EU Missions were at an early stage and their added value could hardly be evaluated yet. The key messages from the position papers and the discussion during the public event are the following:

- The governance of the EU Missions is unclear to several stakeholders and is not considered suitable to ensure that the funded projects deliver on the strategic objectives. This concern was raised also during the event. Different stakeholders (from academia, National Contact Points, business support organisations, public research promotion agencies) perceived the overall functioning of Missions as unclear, and recommendations were made to communicate more effectively on that. The EC should develop specific communication channels for stakeholders and provide better communication on the entire Missions' portfolio.
- There is a risk of dispersion of resources as every Mission has multiple priorities and expected outcomes are very broad. To be fully efficient, some stakeholders participating in the event suggested a better portfolio management by the EC to ensure more ambitious impacts and avoid overlaps between Missions.
- There is little coordination with national initiatives. In this regard, some event participants questioned the fact that Missions are exclusively funded through Horizon Europe, not through other funds. They called for more synergies with both other EU funding sources, such as ERDF funds, and national funding sources.

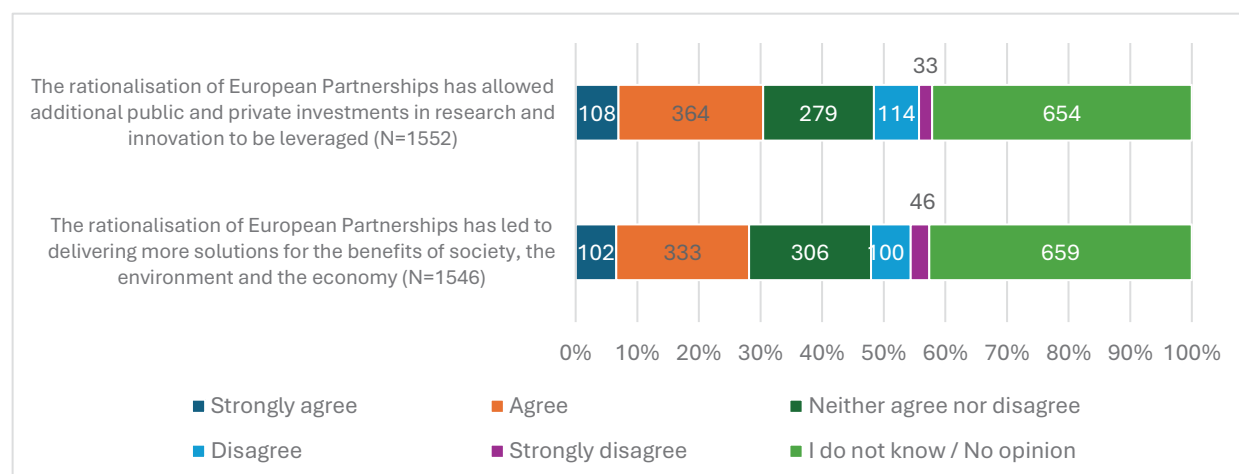
- National and local stakeholders struggle to find an entry point to contribute to the Missions. During the event, different stakeholders called for the simplification of participation and implementation rules, as Missions are currently perceived as complex, making it difficult to attract a variety of actors.
- According to stakeholders from industry, the EU Mission calls have a too narrow scope and do not focus enough on technology development. These aspects limit the possibility for the industry to participate.
- According to research organisations and academia, the EU Missions should focus more on research and development activities. In their opinion, these are currently too focused on piloting and deployment of solutions.
- Participation from research actors was perceived as low due to the lack of opportunities for collaborative research within the EU Missions. Participants from academia confirmed this opinion in the event.
- The link between the EU Missions' calls and the calls published in the Pillar II clusters is unclear. There is a risk of duplication with other parts of Horizon Europe (e.g., European Partnerships). This issue was raised also during the public event by stakeholders from academia. At the same time, synergies between the Missions and Pillar II are limited due to different timeline and topics. A participant working in the aerospace industry recommended to align the topics of the Missions and those in Pillar II to boost synergies.
- There are concerns over the introduction of new EU Missions at this stage.

The consultation asked the respondents their opinion about the rationalisation of the European Partnerships from Horizon 2020 to Horizon Europe. After excluding the responses of those who selected “I do not know”, 53% (472) of respondents “agreed” or “strongly agreed” that “the rationalisation of European Partnerships had allowed additional public and private investments in research and innovation to be leveraged”. In comparison, 31% “neither agreed or disagreed”, and 17% “disagreed” or “strongly disagreed”. In addition, 49% (435) “agreed” or “strongly agreed” that “the rationalisation of European Partnerships [has] led to delivering more solutions for the benefits of society, the environment and the economy”, while 16% “disagreed” or “strongly disagreed” and around a third of respondents (34%) “neither agreed or disagreed”.

Similarly, event participants agreed that partnerships are effective instruments for combining national and EU funds for research and innovation (R&I) and enhance research and dissemination in Europe. Industrial partners, particularly a participant from the aerospace and defence sector, strongly appreciated the fact that partnerships provide a long-term perspective for industry and enable reaching high TRLs.

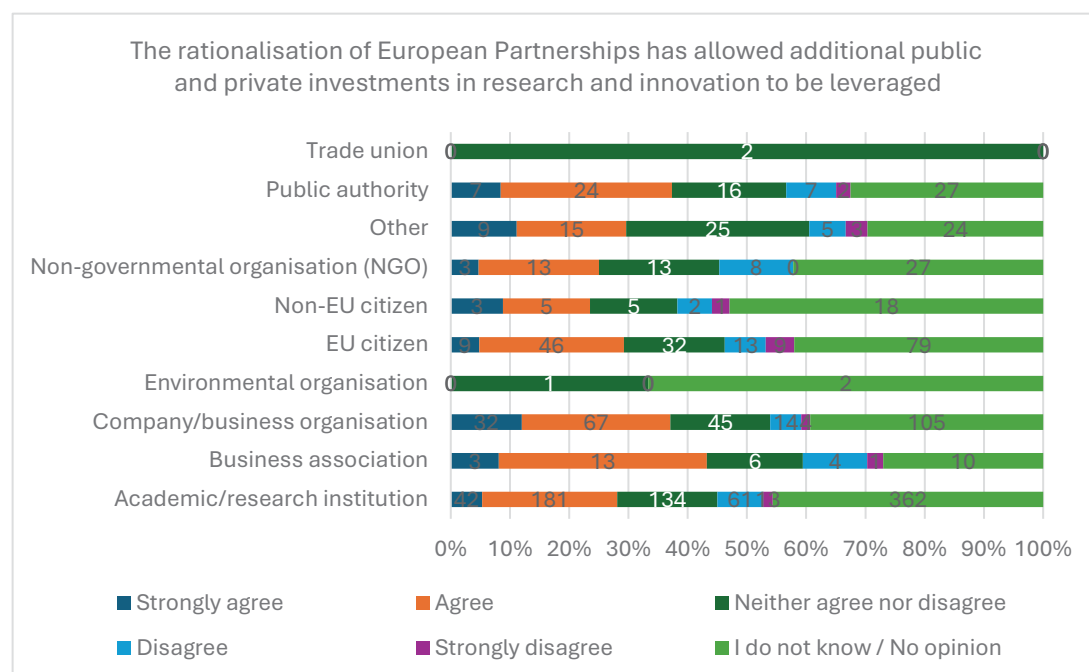
While the simplification process from Horizon 2020 to Horizon Europe was generally appreciated by stakeholders, some event participants called for further simplification, harmonization and greater synergies between the different types of Partnerships. Conversely, representatives from the industry underlined the importance of flexibility and of leaving room for each partnership to decide its own procedures (considering that a Single Act is already in force).

Figure 103. To what extent do you agree with the following statements?



After excluding the responses of those who selected “I do not know”, respectively 57% (491) and 71% (694) of respondents maintained that EU Missions and European Partnerships were “somewhat” or “to a great extent” “more effective compared to regular collaborative research”. Respondents from businesses and business associations valued the partnership approach more than those from other groups.<sup>224</sup> As a matter of fact, some research organisations participating in the event stated that collaborative research should remain the bulk of the programme.

Figure 104: The rationalisation of European Partnerships has allowed additional public and private investments in research and innovation to be leveraged (N= 1552)



<sup>224</sup> The results of the analysis differentiating by type of respondent are reported in Table 33 and Table 34 – additional statistics..

Figure 105: The rationalisation of European Partnerships has led to delivering more solutions for the benefits of society, the environment and the economy (N= 1546)

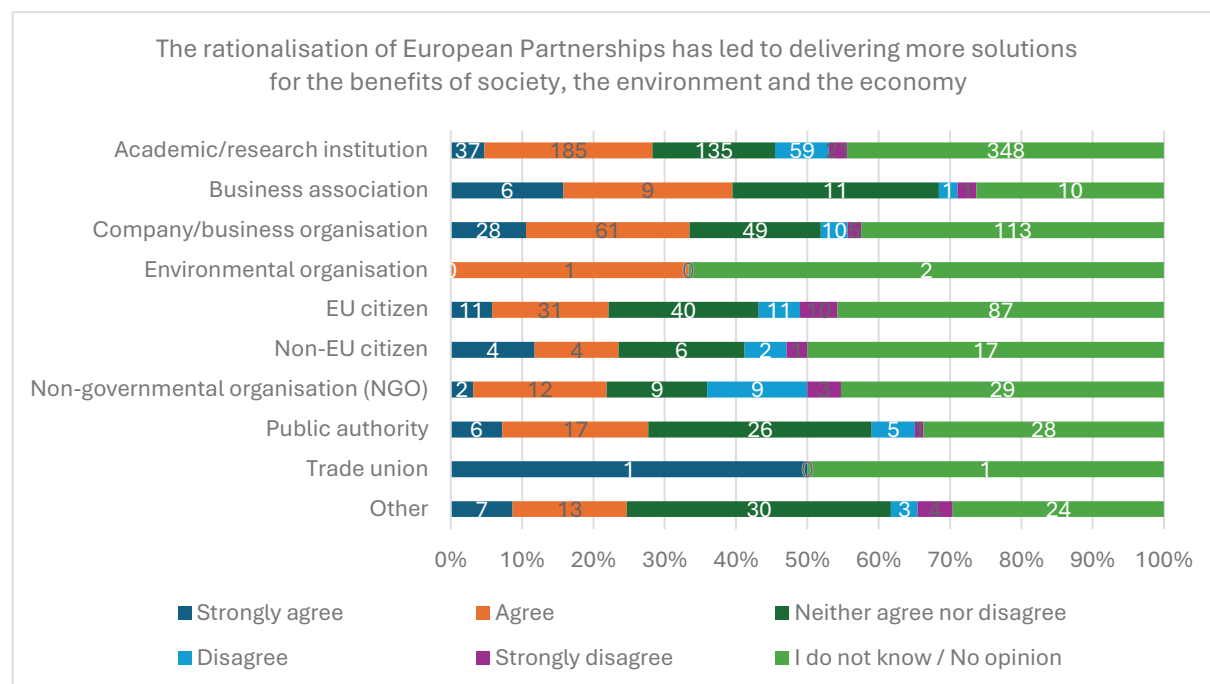


Figure 106: In your opinion, to what extent are European Partnerships and EU Missions supported by Horizon Europe effective compared to regular collaborative research projects in achieving Horizon Europe's objectives?

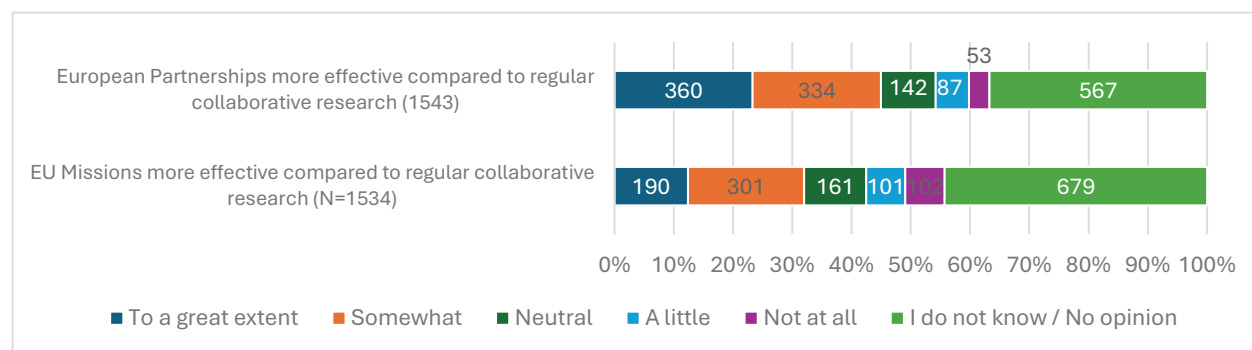


Figure 107: Additional breakdown - European Partnerships (N=1543)

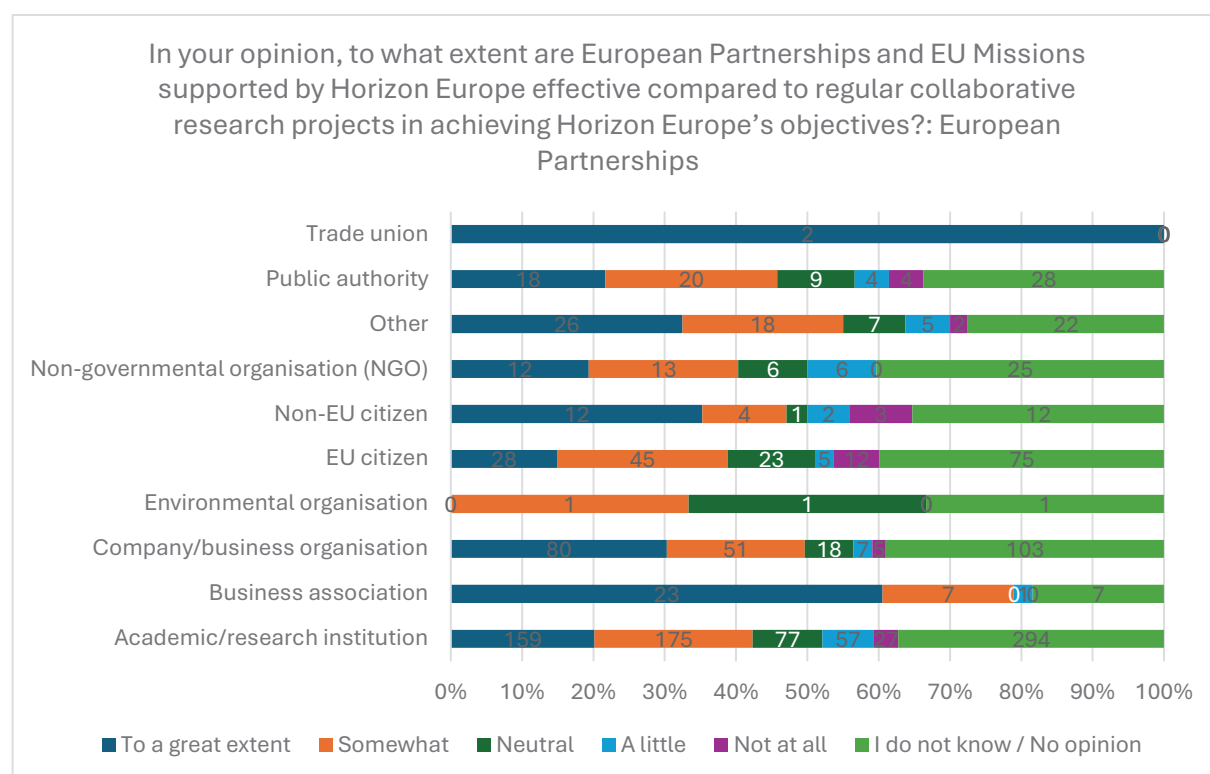
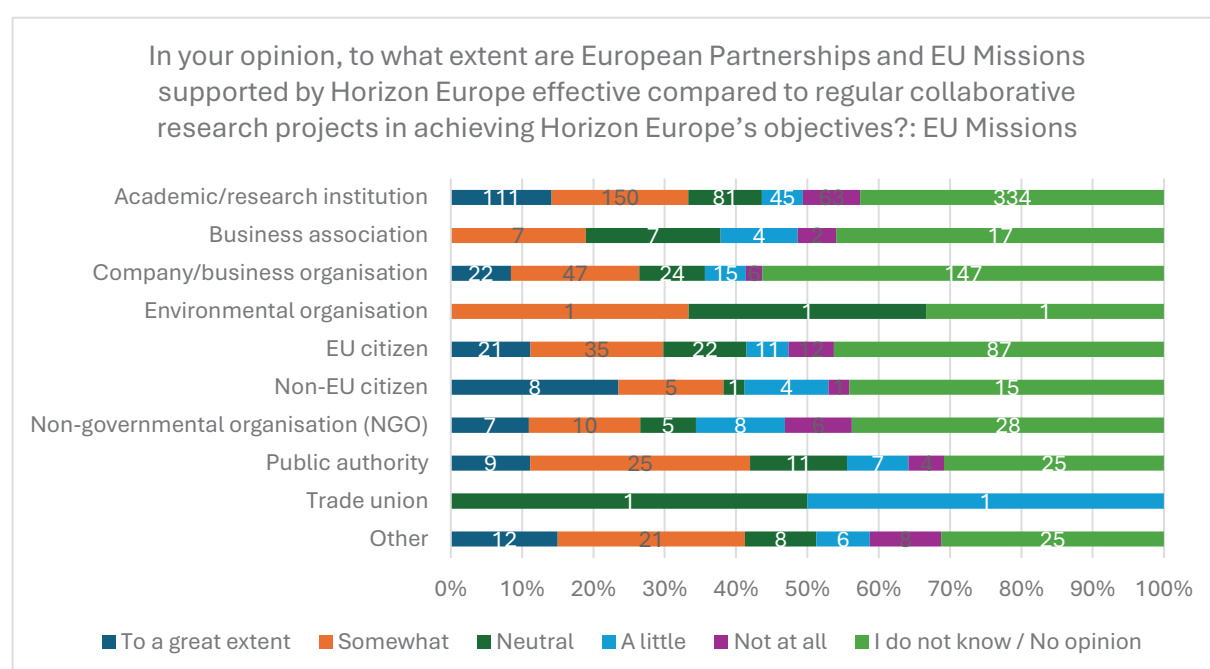


Figure 108: Additional breakdown - EU Missions (N= 1534)



#### Box 8: Specific comments on the European Partnerships

**49 position papers included comments on the European Partnerships.** The key messages from the position papers and the discussion during the public event are the following:

- Partnerships were considered by different types of actors (academia, research and technology organisations, businesses, public authorities) a key instrument to ensure a quick transfer from knowledge into application and innovation. Businesses highly appreciated partnerships as a means to support the European industrial policy.
- Whilst in general the streamlining of partnerships under Horizon Europe was seen positively, some respondents (especially research organisations) maintained that the partnerships have remained fragmented and overly complicated, discouraging newcomers from joining. Concerns on the difficulty in accessing relevant information on the opportunities available, the applicable rules and the reporting requirements were raised also by some event participants from different stakeholder categories (i.e., industry, National Contact Point, research organisation).
- There have been implementation issues and delays at the start of the activities.
- There seems to be a lack of clarity on the governance structures and on the synergies and complementarities with other European and national instruments (including EU Missions). Representatives from regional public administrations and academia participating in the event underlined the difficulties in being involved in the institutionalised partnerships' activities while not being involved in its governance. This contradiction makes it difficult to create synergies between the Partnerships' activities and other R&I actions funded at local / regional / national level. Similarly, some stakeholders from national research promotion agencies observed that there should be better coordination efforts to ensure availability of matching funds from national sources.
- According to some academic and research actors, the conditions of participation of some partnerships have not been transparent. In particular, the rules for participation of research performing organisations raised concerns since organisations that participate in the governing structure of the partnership have been excluded from the calls for proposals.

Other points discussed during the event with stakeholders were the following:

- Deterring factors to participation: the applicable rules for private partners and public bodies, as well as the cost reporting requirements, have been identified as a deterring factor to participation, especially from academic stakeholders. According to an industry stakeholder, the request to commit on a certain funding level from the beginning as a pre-requisite to participation can disincentivize companies from joining.
- Centralised / decentralised management of the Partnerships: some participants from research organisations suggested to centralize the Partnerships management, either by the EC or by an Executive Agency to ensure better a more consistent management and to avoid duplicating governing structures. Conversely, industry stakeholders urged to avoid an excessive involvement of the EC and allow flexibility, considering the amount of funding committed by the private sector.
- Level of knowledge and experience of policy officers managing the partnerships: participants from different stakeholder categories (i.e., National Contact Point, research organisations, academia) pointed out the need for training for all the actors involved in managing and implementing partnerships (especially co-funded), including policy officers.



## Impact of exceptional limitations

After excluding the responses of those who selected “I do not know”, the majority (56%; 650) of respondents stated that their project was not “impacted by the exceptional limitations on participation in Horizon Europe by non-EU legal entities” or was impacted a little. Only 13% (151) of respondents indicated that their project was impacted “to a great extent”.

Figure 109. According to you, to what extent is your research or innovation project impacted by the exceptional limitations on participation in Horizon Europe by non-EU legal entities?

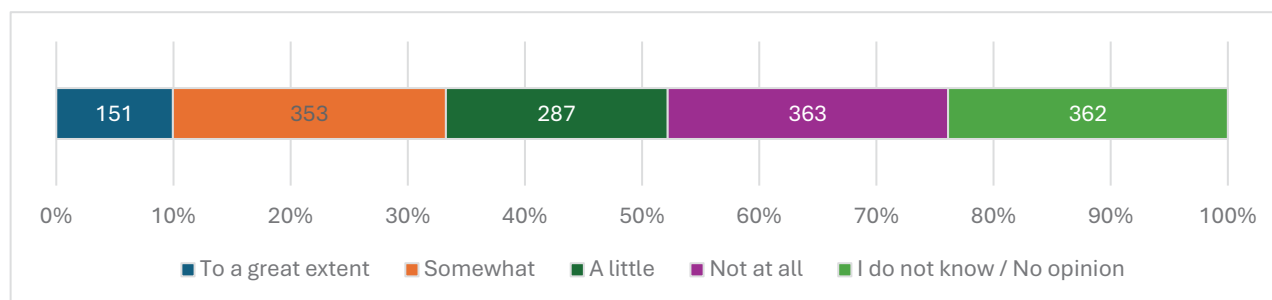
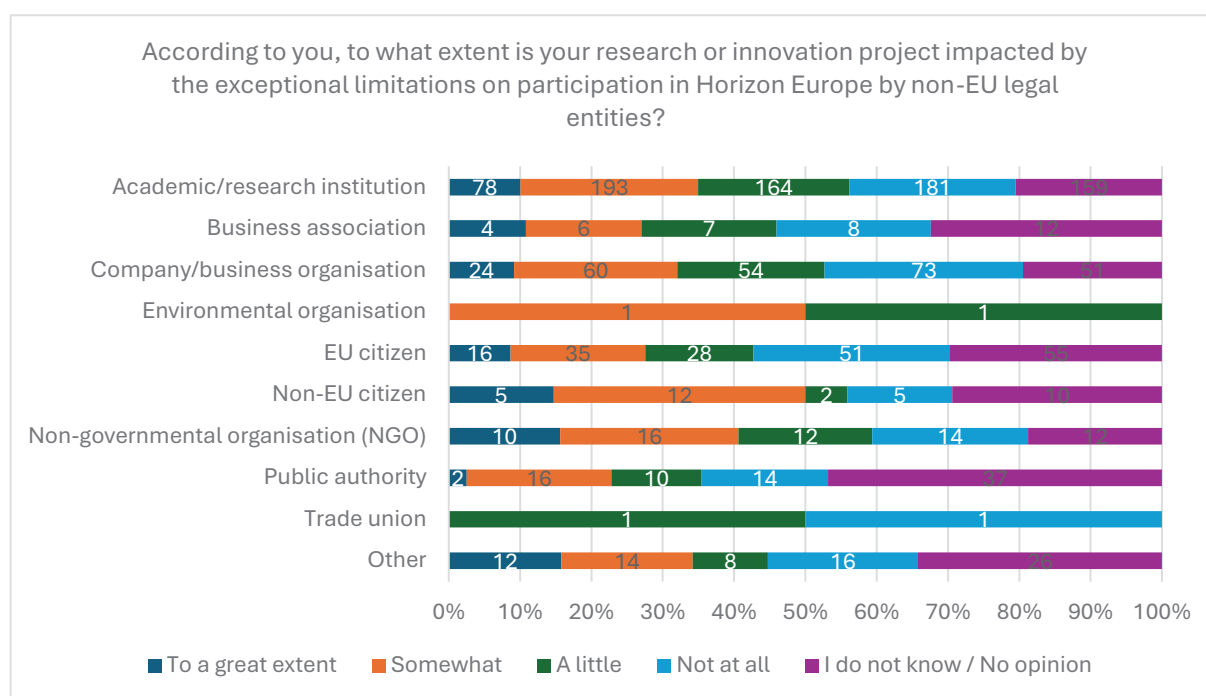


Figure 110: Additional breakdown - impact of exceptional limitations on participation (N=1516)



## Synergies with other EU programmes

55% (823) of respondents expressed an opinion on the synergies between Horizon Europe and Erasmus+. Between 13% and 41% of all the respondents expressed an opinion on the synergies between Horizon Europe and other EU programmes<sup>225</sup>. After removing the responses of those

<sup>225</sup> Common Agricultural Policy (CAP), LIFE - Programme for Environment and Climate Action, European Maritime, Fisheries and Aquaculture Fund (EMFAF), Creative Europe Programme, European Social Fund Plus (ESF+), European Regional Development Fund (ERDF), Just Transition Mechanism, Recovery and Resilience

who selected “I do not know / no opinion”, the majority of respondents selected that “synergies were exploited” or “fully exploited” with Erasmus+ (63%; 518), Digital Europe Programme (62%; 838), Euratom Research and Training Programme (62%; 225), EU4Health Programme (57%; 275), Connecting Europe Facility (CEF) (56%; 237), Programme for Environment and Climate Action (LIFE) (55%; 339), European Regional Development Fund (ERDF) (52%; 299).

45 position papers provided comments on the synergies between Horizon Europe and other EU programmes. Most contributions, from academia, business and public actors, focused on synergies with structural funds (ERDF). They concluded that it was too early to assess to what extent these synergies will be possible, as the operational programmes are not fully approved. However, they also pointed out that synergies with the ERDF had proved difficult to harness in the past because financing modalities were different or incompatible. Stakeholders also believe that the creation of various new EU programmes in the current MFF period is positive because they create more opportunities for applying research discoveries (e.g., Innovation fund). However, at the same time, beneficiaries face a complex EU financing landscape with a multitude of programmes, each with its own rules for participation. Stakeholders asked for clearer rules, guidance, and more clarity about the possible pathways between programmes.

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Facility, EU4Health Programme, Connecting Europe Facility (CEF), Digital Europe Programme (DEP), Single Market Programme, InvestEU, Innovation Fund under the Emission Trading Scheme, Union Space Programme, Neighbourhood, Development and International Cooperation Instrument (NDICI) and the Instrument for Pre-accession, Assistance (IPA III), Internal Security Fund (ISF), Border Management and Visa Instrument (BMVI), European Defence Fund, Euratom Research and Training Programme.

Figure 111. How do the following EU programmes work in synergy (complement and reinforce) with Horizon Europe?

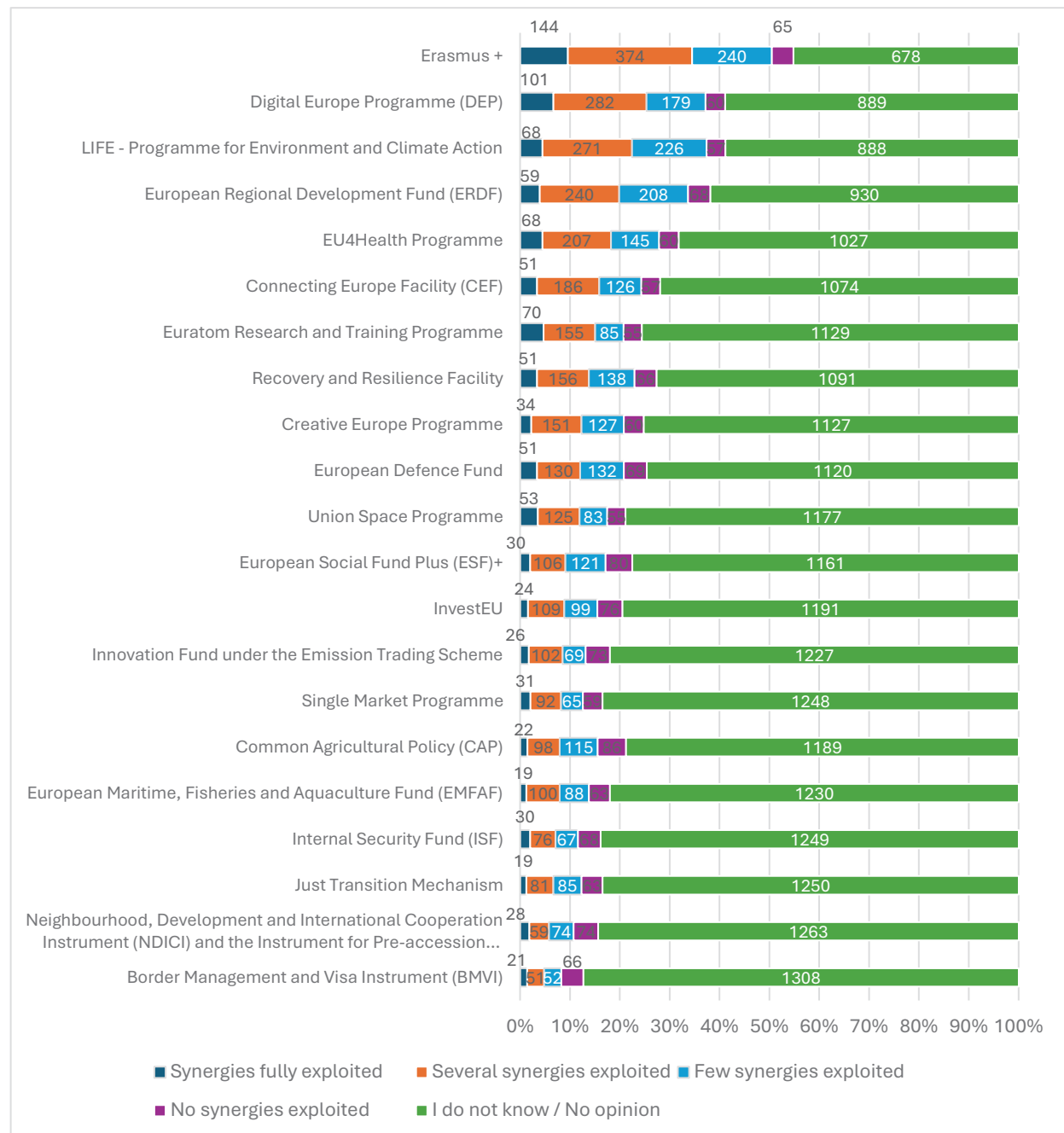


Figure 112: Additional breakdown - LIFE (N= 1510)

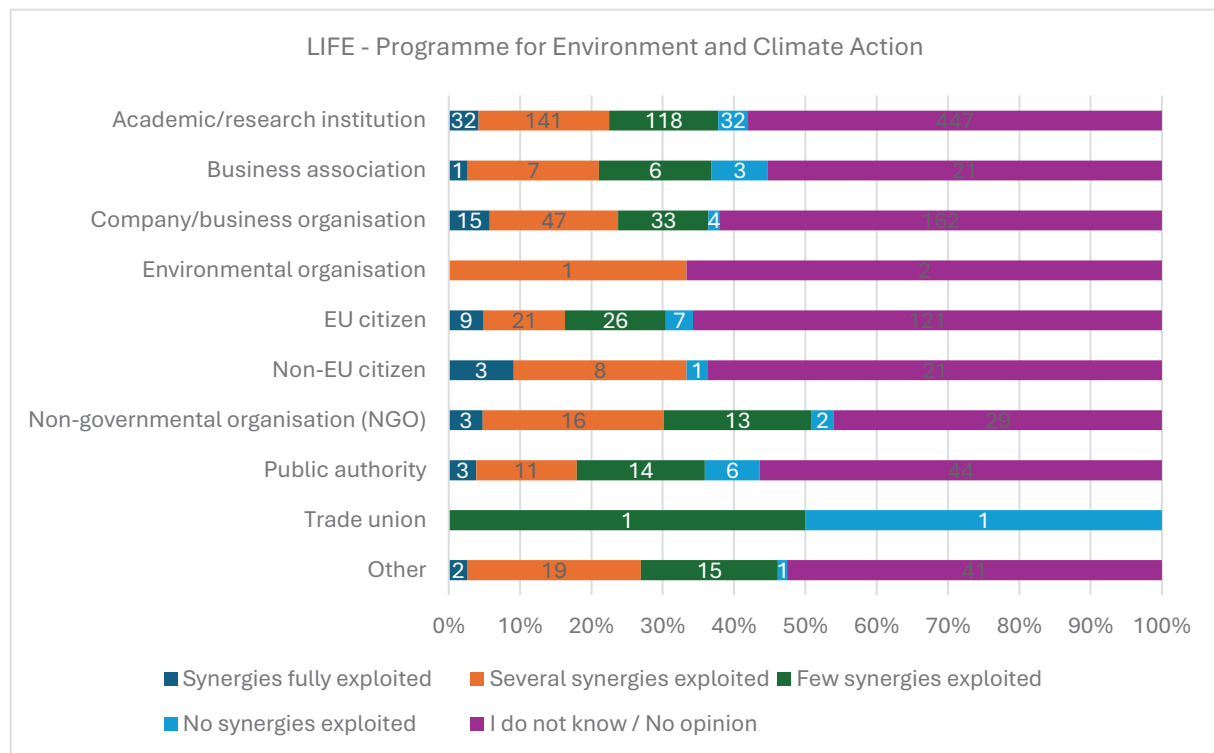


Figure 113: Additional breakdown - Erasmus+ (N= 1511)

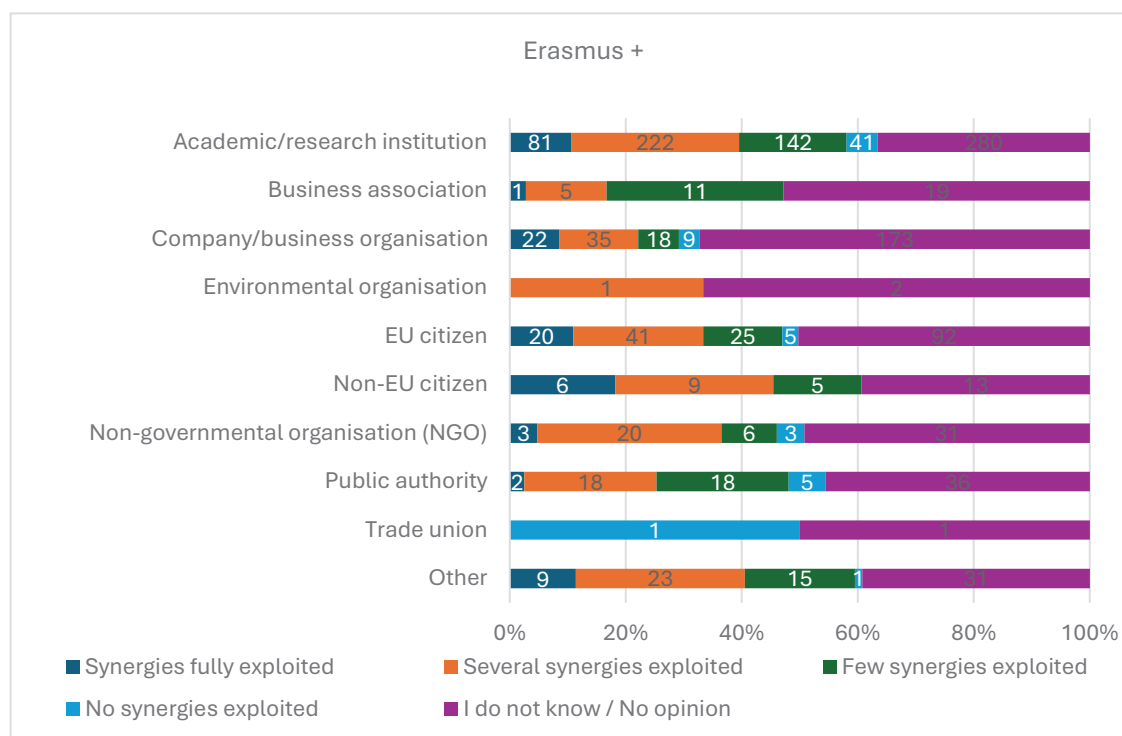
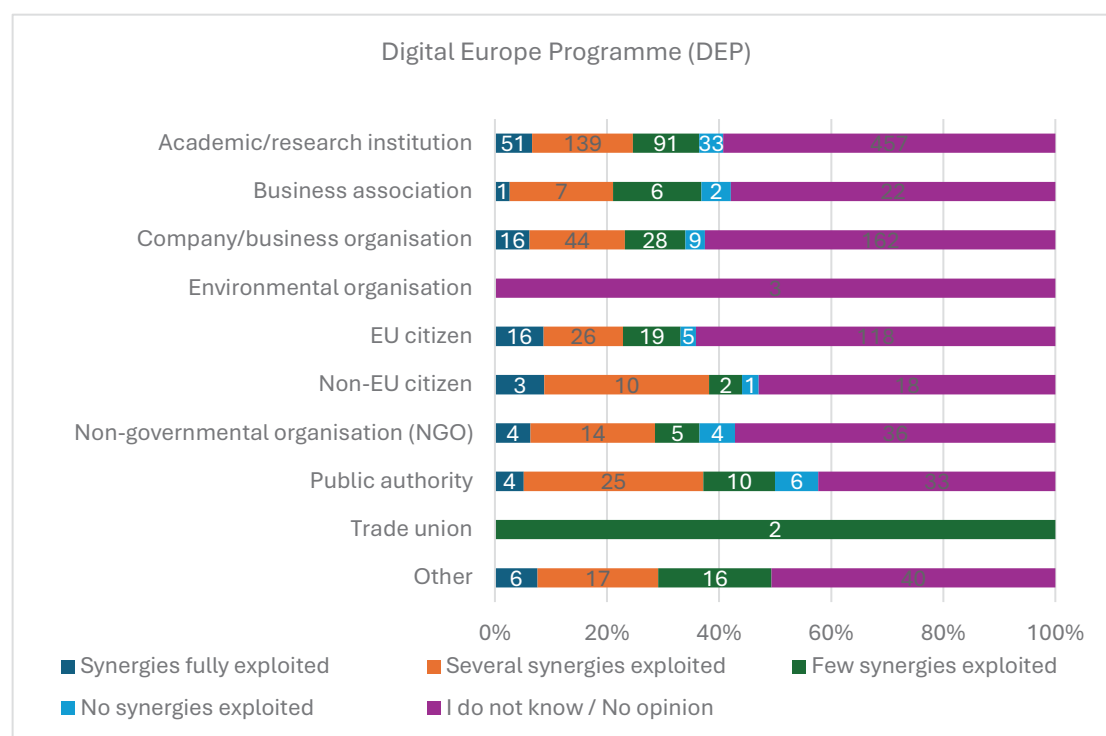


Figure 114: Additional breakdown - DEP (N= 1511)

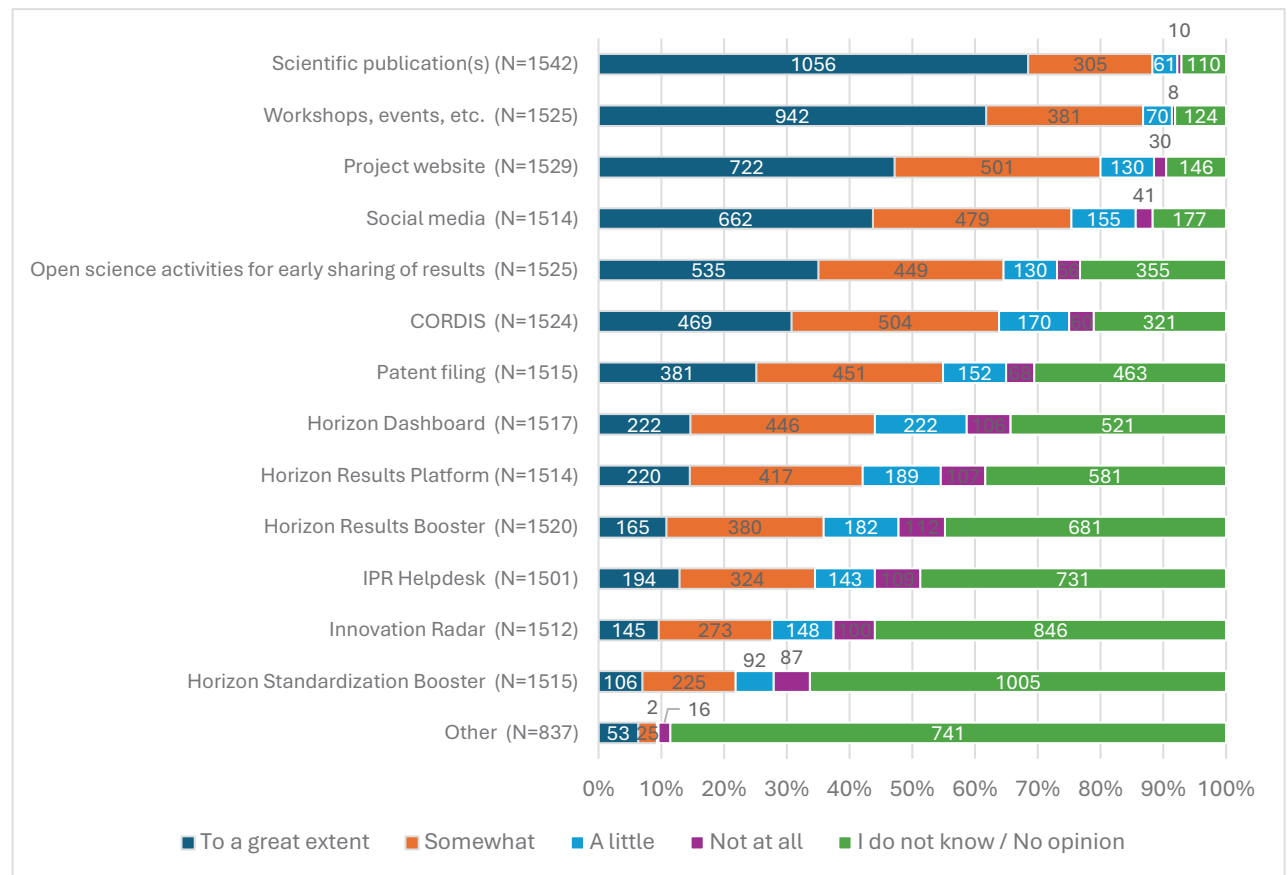


### Exploitation and dissemination of results

Respondents indicated scientific publication(s), workshops or other events, project website and social media (especially LinkedIn) as the initiatives that mostly helped dissemination, exploitation and access to research and innovation results. In particular, 68% (1 056) and 62% (942) of respondents respectively stated that scientific publication(s) and workshops or other events “helped disseminate, exploit and access research and innovation results” ”to a great extent”.

13 position papers provided comments on Horizon Europe dissemination and exploitation initiatives. Stakeholders agreed that increased efforts in knowledge valorisation were key to ensure greater impacts. They advocated for continued investment, better monitoring and further awareness raising of dissemination and exploitation activities.

Figure 115: To what extent do the following initiatives help disseminate, exploit and access research and innovation results?





## EC support services for dissemination and exploitation:

Figure 116: Additional breakdown - Horizon Dashboard (N= 1517)

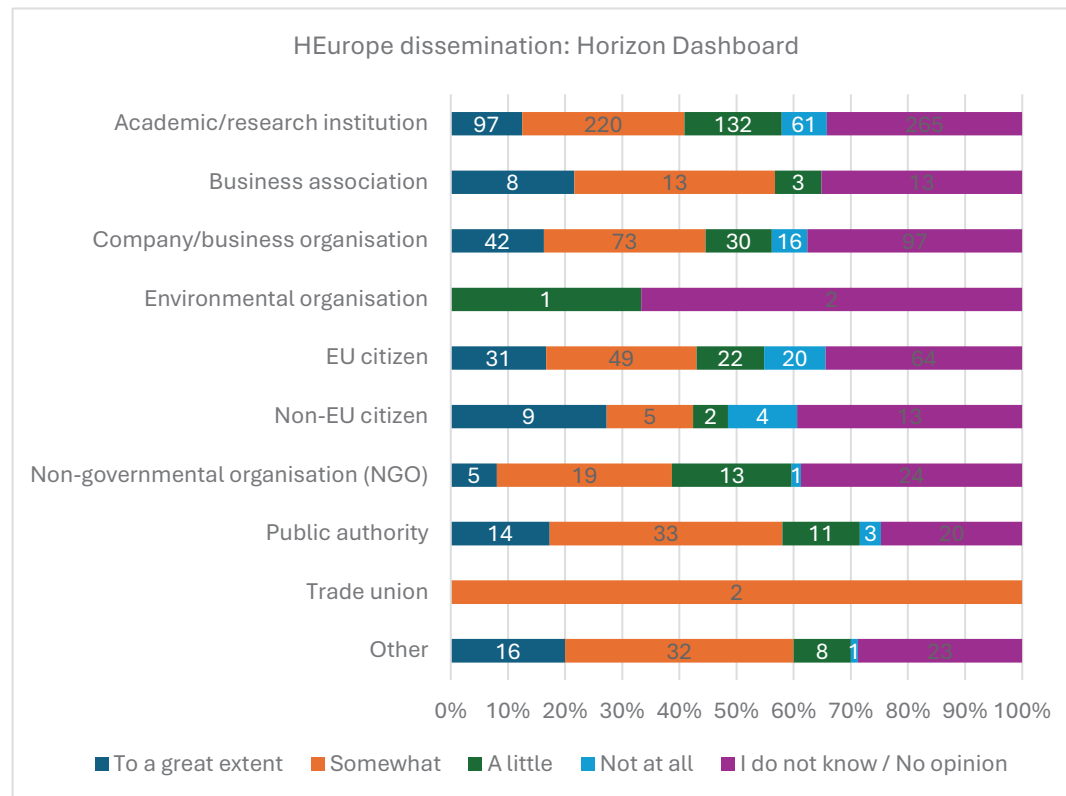


Figure 117: Additional breakdown - Horizon Results Booster (N= 1520)

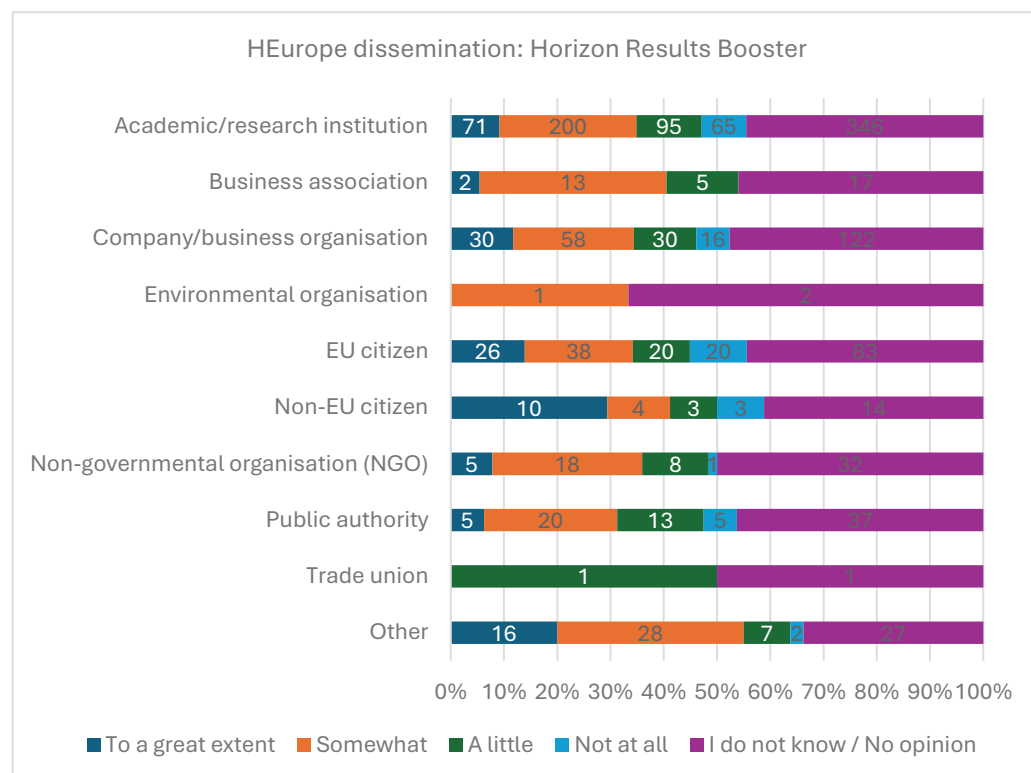


Figure 118: Additional breakdown - Horizon Results Platform (N= 1514)

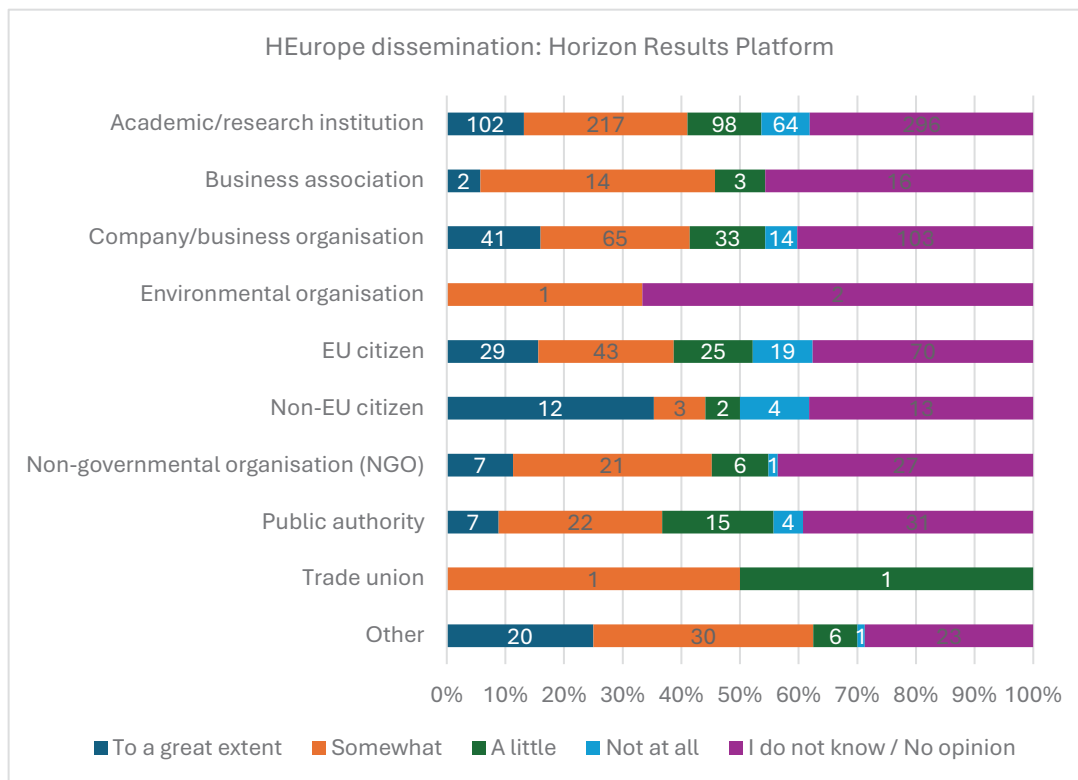


Figure 119: Additional breakdown - CORDIS (N= 1524)

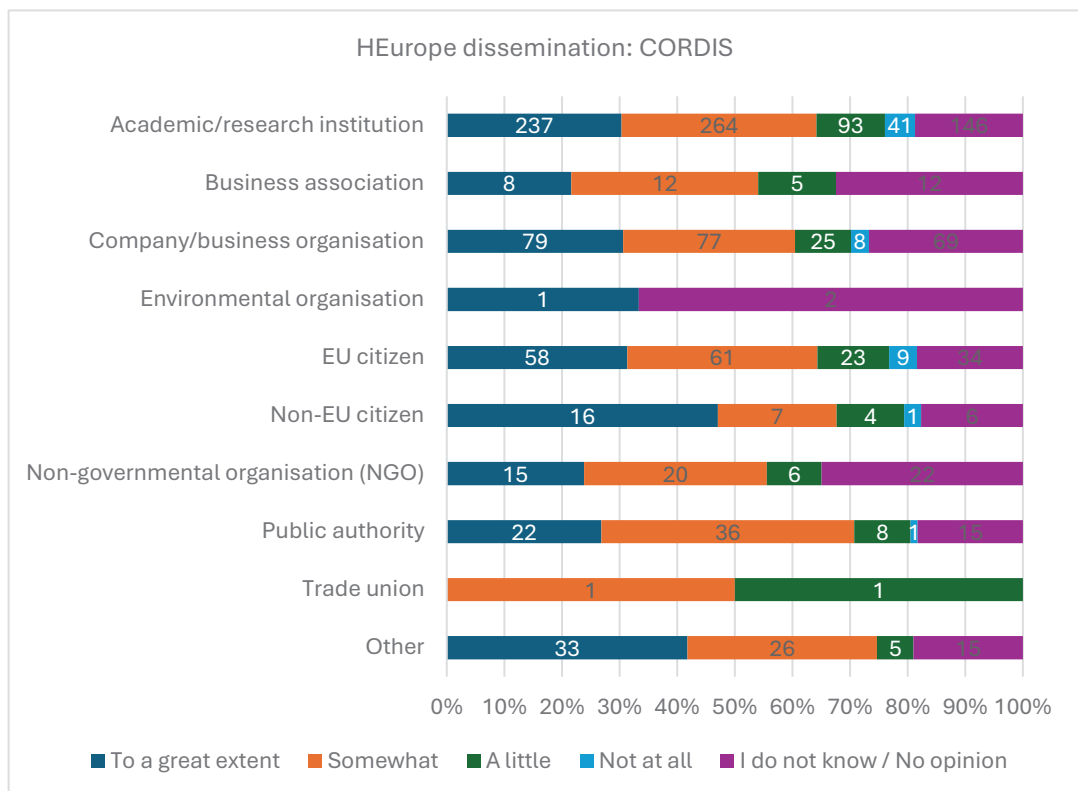


Figure 120: Additional breakdown - Innovation Radar (N= 1512)

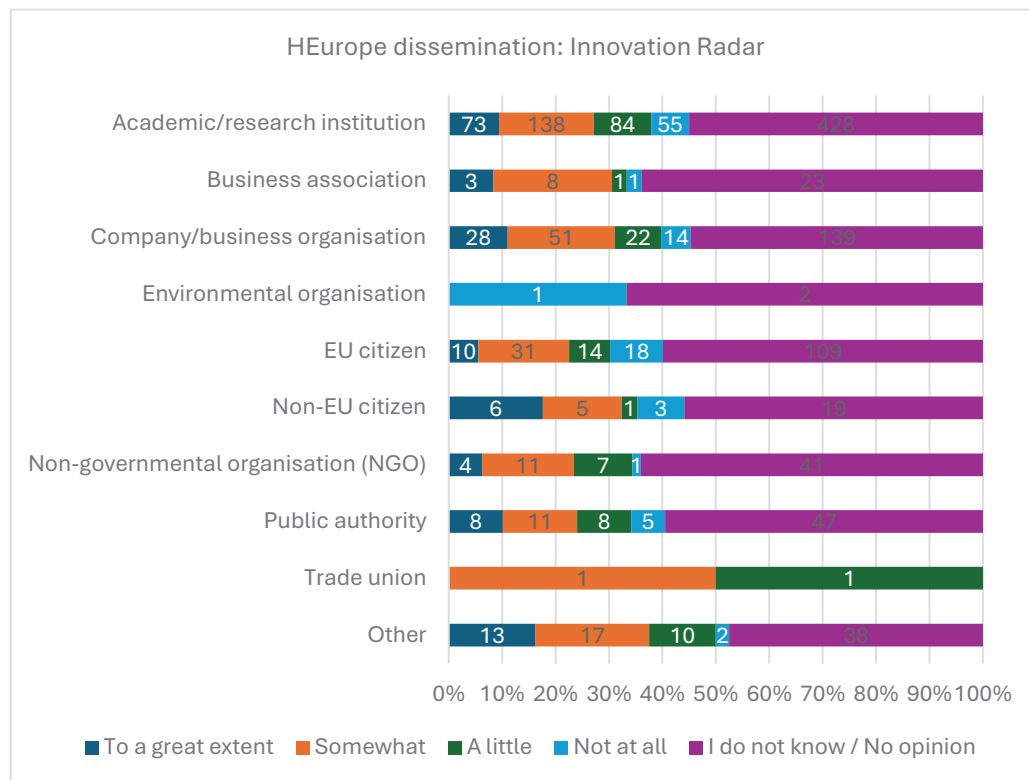


Figure 121: Additional breakdown - IPR Helpdesk (N= 1501)

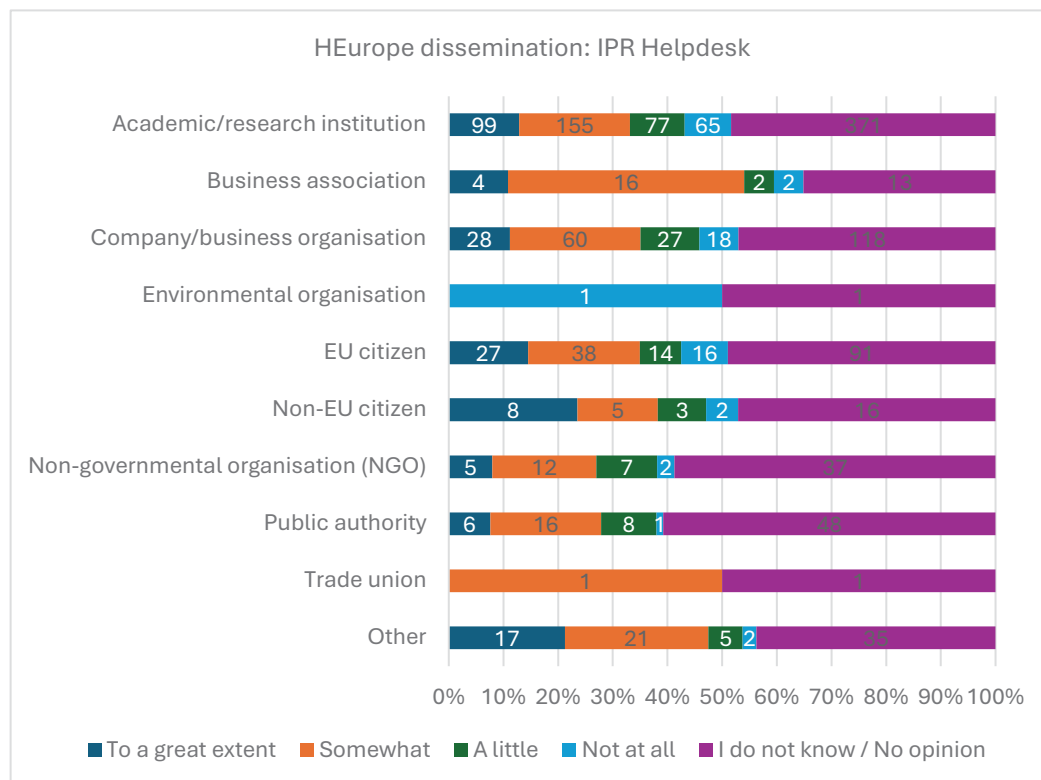
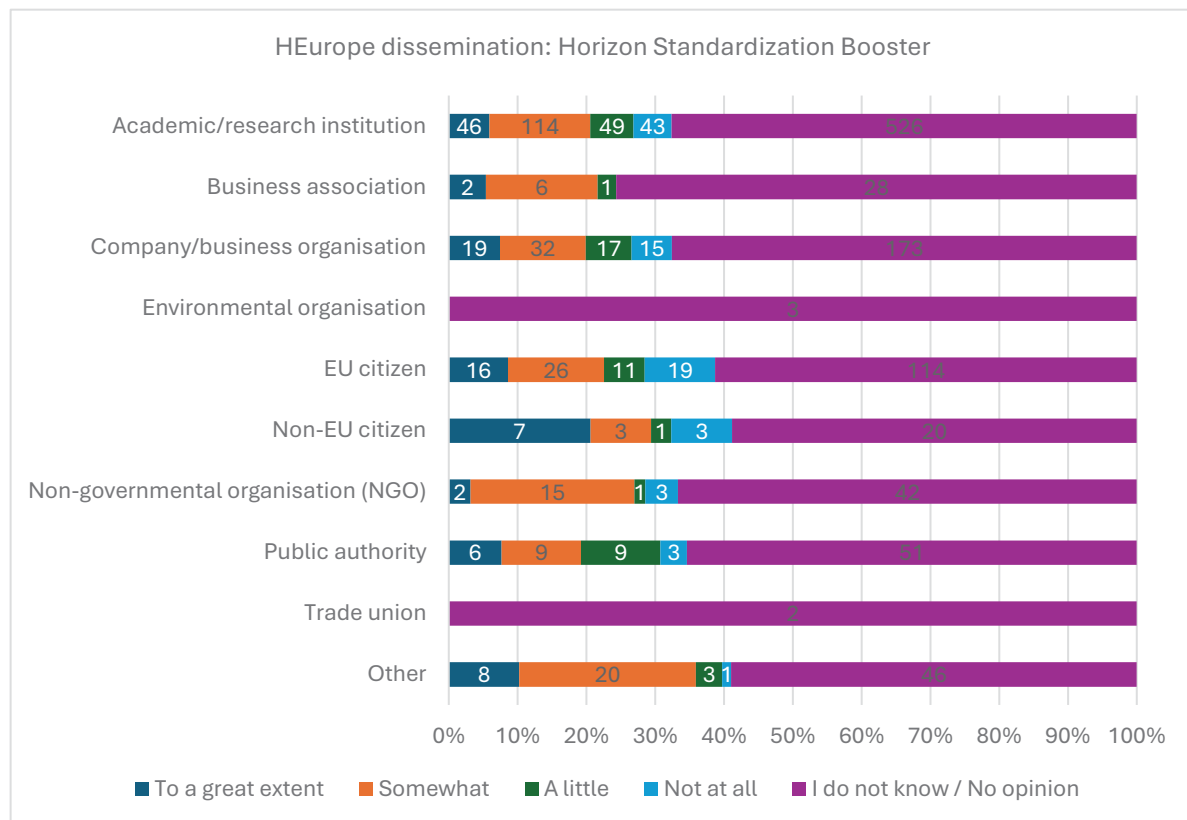


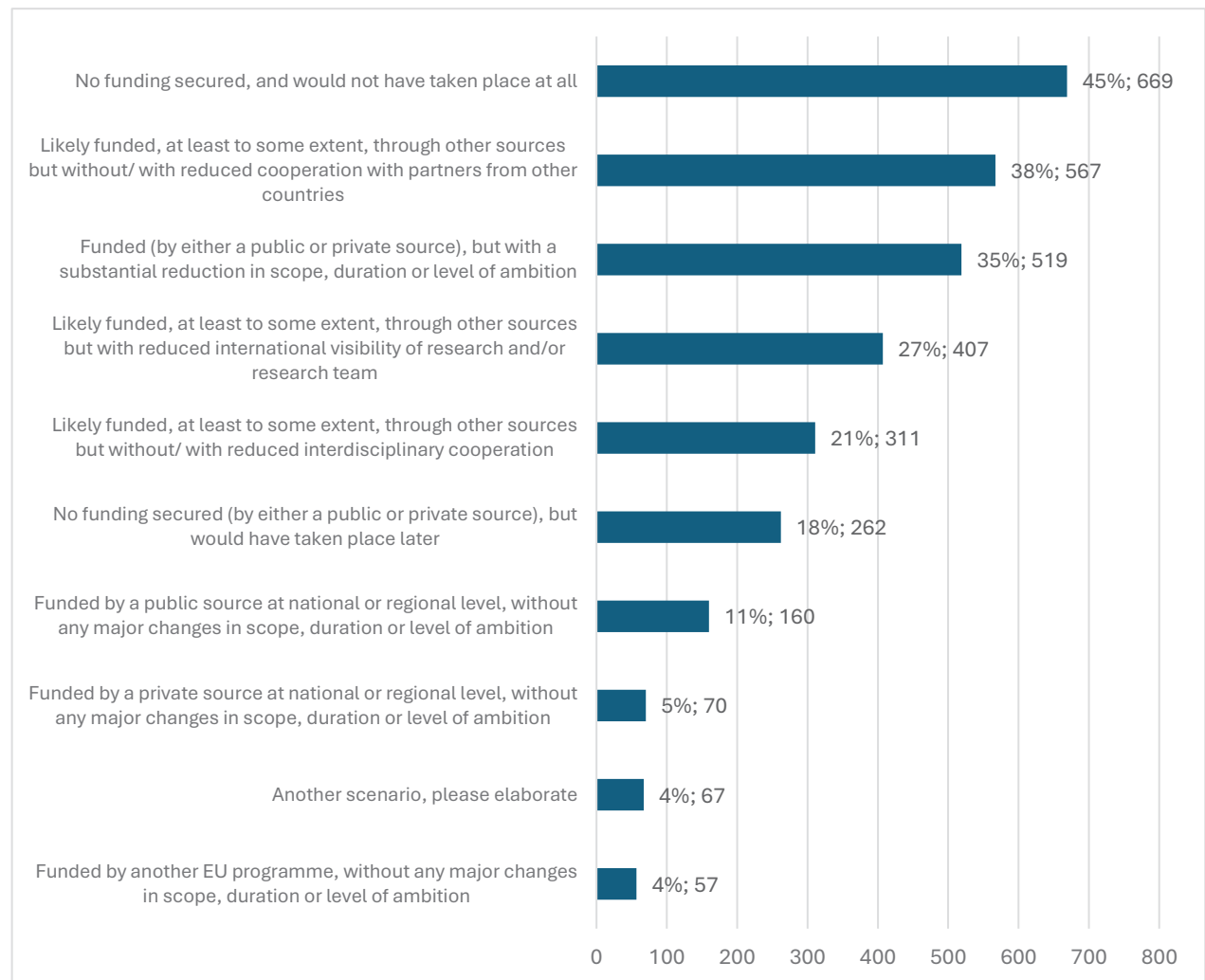
Figure 122: Horizon Standardization Booster (N= 1515)



### Horizon Europe added value

Asked about what would happen to their “research and innovation project(s) without European-level funding through Horizon Europe”, 45% (669) of respondents maintained that their project “would not have taken place”, 38% (567) that, likely, it “would have been funded but with reduced cooperation with partners from other countries” and 35% (519) that it would have been “funded but with substantial reduction in scope, duration or level of ambition”.

Figure 123: What would happen to your research and innovation project(s), without European-level funding through Horizon Europe? Multiple answers possible. (N=1490)



No major differences were observed among the various stakeholder groups.

## Key lessons learned and messages for the future

### On budgeting for the future and work programmes

- Consider budget increases for the next Framework Programme, especially for those parts of the Framework Programme in which many excellent proposals could not be funded.
- A long-term, stable budget is key for R&I stakeholders. Therefore, avoid reallocating the Framework Programme budget to other EU priorities.
- Consult more extensively and timely when drafting the work programmes.
- Improve coordination among EC services when preparing the Work Programmes to ensure coherence among topics of different Work Programmes.
- Improve the integration of social sciences and humanities in the Work Programmes.

### On intervention modes and types of action

- Ensure to cover the entire TRL spectrum, addressing the gap between fundamental research in Pillar I and Innovation Actions in Pillar II - e.g., by introducing more Research and Innovation Actions targeting medium TRLs in Pillar II.
- Ensure a balance between bottom-up and top-down calls for proposals combining different types of calls in all the Pillars.
- Ensure a balance between large and small projects in the different calls for proposals.
- Enhance the synergy between clusters in Pillar II by introducing cross-cluster calls of proposals.

### On the identification of funding priorities

- The co-design approach was appreciated and should be continued. Improve the transparency of the process and streamline consultation practices.
- To identify funding priorities, define the goals but leave more room for stakeholders to define the pathways to achieve those goals.
- Ensure that excellent, fundamental and frontier research remain at the centre of Horizon Europe (especially according to academic actors) and reinforce the support for research infrastructures.
- Ensure that the budget of single Innovation Actions is sufficient to carry out pilot and demonstration activities.
- Introduce new measures to bring research into the market and increase participation from SMEs via targeted actions.
- Continue to support international cooperation by promoting collaborations of national and European research infrastructures with research infrastructures outside the EU.

### On the implementation of the programme/projects and procedures

- Publish the Annotated Model Grant Agreement.
- Ensure continuity and stability in the rules of participation.
- Further simplify the administrative procedures (e.g., rules to reimburse personnel costs).
- Publish clear guidelines to support administrative processes during project implementation.
- Monitor the effects of using the lump-sum model and consider for which projects it could be extended. Provide more guidance on this type of instrument.



- Consolidate and streamline the EU funding programmes and instruments.
- Enhance the possibility of exploiting synergies with other EU programmes by clarifying the mechanisms to access the different programmes and further harmonising the rules and procedures.

### Additional statistics

#### Calls for proposals – Breakdown by type of respondents

Table 23: To what extent do you agree with the following statements concerning the calls for proposals under Horizon Europe? Finding the right call for my proposal was easy.

| TYPE OF RESPONDENT                  | N   | STRONGLY AGREE | AGREE | NEITHER AGREE NOR DISAGREE | DISAGREE | STRONGLY DISAGREE | I DO NOT KNOW / NO OPINION |
|-------------------------------------|-----|----------------|-------|----------------------------|----------|-------------------|----------------------------|
| Academic/research institution       | 807 | 8.4%           | 30.0% | 29.6%                      | 24.8%    | 5.5%              | 1.7%                       |
| Company/business organisation       | 269 | 10.8%          | 34.6% | 28.3%                      | 23.4%    | 2.2%              | 0.7%                       |
| EU citizen                          | 194 | 2.9%           | 37.1% | 25.7%                      | 17.1%    | 5.7%              | 11.4%                      |
| Public authority                    | 83  | 8.4%           | 31.3% | 27.7%                      | 18.1%    | 4.8%              | 9.6%                       |
| Other                               | 82  | 11.0%          | 28.0% | 25.6%                      | 26.8%    | 3.7%              | 4.9%                       |
| Non-governmental organisation (NGO) | 65  | 10.8%          | 29.2% | 18.5%                      | 21.5%    | 4.6%              | 15.4%                      |
| Business association                | 38  | 7.9%           | 42.1% | 13.2%                      | 26.3%    | 7.9%              | 2.6%                       |
| Non-EU citizen                      | 35  | 2.9%           | 37.1% | 25.7%                      | 17.1%    | 5.7%              | 11.4%                      |
| Environmental organisation          | 3   | 0.0%           | 33.3% | 33.3%                      | 33.3%    | 0.0%              | 0.0%                       |
| Trade union                         | 2   | 0.0%           | 50.0% | 0.0%                       | 50.0%    | 0.0%              | 0.0%                       |

Table 24: To what extent do you agree with the following statements concerning the calls for proposals under Horizon Europe? There is an adequate mix of calls for proposals addressing specific topics (top-down) and calls for proposals without a pre-defined topic (bottom-up).

| TYPE OF RESPONDENT                  | N   | STRONGLY AGREE | AGREE | NEITHER AGREE NOR DISAGREE | DISAGREE | STRONGLY DISAGREE | I DO NOT KNOW / NO OPINION |
|-------------------------------------|-----|----------------|-------|----------------------------|----------|-------------------|----------------------------|
| Academic/research institution       | 841 | 6.0%           | 28.2% | 23.7%                      | 24.8%    | 8.4%              | 8.9%                       |
| Company/business organisation       | 277 | 9.7%           | 29.6% | 19.1%                      | 22.1%    | 5.2%              | 14.2%                      |
| EU citizen                          | 202 | 3.1%           | 29.7% | 24.5%                      | 22.4%    | 5.7%              | 14.6%                      |
| Public authority                    | 87  | 7.1%           | 28.6% | 22.6%                      | 16.7%    | 7.1%              | 17.9%                      |
| Other                               | 93  | 8.5%           | 29.3% | 19.5%                      | 23.2%    | 7.3%              | 12.2%                      |
| Non-governmental organisation (NGO) | 72  | 1.5%           | 23.1% | 29.2%                      | 21.5%    | 7.7%              | 16.9%                      |
| Business association                | 49  | 5.3%           | 28.9% | 10.5%                      | 39.5%    | 7.9%              | 7.9%                       |
| Non-EU citizen                      | 36  | 14.3%          | 34.3% | 17.1%                      | 14.3%    | 2.9%              | 17.1%                      |
| Environmental organisation          | 4   | 0              | 0     | 0                          | 33.3%    | 0                 | 66.7%                      |
| Trade union                         | 2   | 0              | 50.0% | 0                          | 50.0%    | 0                 | 0                          |

## Types of support – breakdown by type of respondents

Table 25: What is your level of satisfaction with the way the European Commission implements the following types of support under Horizon Europe? Co-funding (e.g., European Partnerships). The number of respondents (N) and the calculation of % exclude the respondents who selected “I do not know / I have not used it”.

| TYPE OF RESPONDENT                  | N   | VERY SATISFIED | SATISFIED | NEUTRAL | DISSATISFIED | VERY DISSATISFIED |
|-------------------------------------|-----|----------------|-----------|---------|--------------|-------------------|
| Academic/research institution       | 486 | 9.5%           | 35.8%     | 30.7%   | 18.9%        | 5.1%              |
| Business association                | 25  | 16.0%          | 36.0%     | 36.0%   | 12.0%        | 0                 |
| Company/business organisation       | 144 | 16.7%          | 39.6%     | 34.7%   | 6.3%         | 2.8%              |
| EU citizen                          | 102 | 6.9%           | 44.1%     | 25.5%   | 11.8%        | 11.8%             |
| Non-EU citizen                      | 19  | 15.8%          | 57.9%     | 5.3%    | 15.8%        | 5.3%              |
| Non-governmental organisation (NGO) | 38  | 5.3%           | 34.2%     | 31.6%   | 23.7%        | 5.3%              |
| Other                               | 58  | 20.7%          | 19.0%     | 36.2%   | 19.0%        | 5.2%              |
| Public authority                    | 57  | 10.5%          | 35.1%     | 22.8%   | 21.1%        | 10.5%             |
| Trade union                         | 2   | 50.0%          | 50.0%     | 0       | 0            | 0                 |

Table 26: What is your level of satisfaction with the way the European Commission implements the following types of support under Horizon Europe? EU Missions. The number of respondents (N) and the calculation of % exclude the respondents who selected “I do not know / I have not used it”.

| TYPE OF RESPONDENT                  | N   | VERY SATISFIED | SATISFIED | NEUTRAL | DISSATISFIED | VERY DISSATISFIED |
|-------------------------------------|-----|----------------|-----------|---------|--------------|-------------------|
| Academic/research institution       | 459 | 9.6%           | 28.3%     | 37.0%   | 18.5%        | 6.5%              |
| Business association                | 17  | 0%             | 41.2%     | 35.3%   | 23.5%        | 0%                |
| Company/business organisation       | 98  | 21.4%          | 30.6%     | 34.7%   | 0%           | 4.1%              |
| EU citizen                          | 94  | 9.6%           | 30.9%     | 39.4%   | 11.7%        | 8.5%              |
| Non-EU citizen                      | 15  | 26.7%          | 26.7%     | 26.7%   | 20.0%        | 0%                |
| Non-governmental organisation (NGO) | 34  | 5.9%           | 20.6%     | 35.3%   | 29.4%        | 8.8%              |
| Other                               | 52  | 11.5%          | 19.2%     | 40.4%   | 25.0%        | 3.8%              |
| Public authority                    | 57  | 7.0%           | 29.8%     | 38.6%   | 21.1%        | 3.5%              |
| Trade union                         | 2   | 0%             | 0%        | 100.0%  | 0%           | 0%                |
| Environmental organisation          | 1   | 0              | 100%      | 0       | 0            | 0                 |

## The efforts to participate in Horizon Europe compared to Horizon 2020 – breakdown by country group

Table 27: The effort needed to participate in Horizon Europe compared to Horizon 2020 is: (EU14 N= 1 216; EU13 N= 177; EU Associated Countries N= 82; Third Countries N= 106)

|                         | GREATER | SIMILAR | LOWER | I DON'T KNOW |
|-------------------------|---------|---------|-------|--------------|
| EU14                    | 15.4%   | 66.9%   | 6.7%  | 11.1%        |
| EU13                    | 14.1%   | 61.6%   | 10.7% | 13.6%        |
| EU Associated Countries | 18.3%   | 59.8%   | 9.8%  | 12.2%        |
| Third Countries         | 17.9%   | 62.3%   | 4.7%  | 15.1%        |

## The efforts to participate in Horizon Europe compared to Horizon 2020 – breakdown by type of respondents

Table 28: The effort needed to participate in Horizon Europe compared to Horizon 2020 is:

| TYPE OF RESPONDENT                  | N   | GREATER | SIMILAR | LOWER | I DON'T KNOW |
|-------------------------------------|-----|---------|---------|-------|--------------|
| Academic/research institution       | 809 | 16.2%   | 68.7%   | 5.6%  | 9.5%         |
| Company/business organisation       | 268 | 13.8%   | 61.2%   | 11.9% | 13.1%        |
| EU citizen                          | 194 | 16.5%   | 61.3%   | 5.7%  | 16.5%        |
| Public authority                    | 85  | 14.1%   | 63.5%   | 5.9%  | 16.5%        |
| Other                               | 81  | 18.5%   | 66.7%   | 6.2%  | 8.6%         |
| Non-governmental organisation (NGO) | 66  | 9.1%    | 66.7%   | 7.6%  | 16.7%        |
| Business association                | 38  | 13.2%   | 73.7%   | 7.9%  | 5.3%         |
| Non-EU citizen                      | 35  | 17.1%   | 45.7%   | 20.0% | 17.1%        |
| Environmental organisation          | 3   | 33.3%   | 33.3%   | 0.0%  | 33.3%        |
| Trade union                         | 2   | 50.0%   | 50.0%   | 0.0%  | 0.0%         |

## The efforts to participate in Horizon Europe compared to other research and innovation programmes – breakdown by country group

Table 29: The effort needed to participate in Horizon Europe compared to that of other research and innovation programmes was: (EU14 N= 1 212; EU13 N= 173; EU Associated Countries N= 83; Third Countries N= 107)

|                         | GREATER | SIMILAR | LOWER | I DON'T KNOW |
|-------------------------|---------|---------|-------|--------------|
| EU14                    | 36.6%   | 32.7%   | 8.2%  | 22.6%        |
| EU13                    | 34.7%   | 37.6%   | 6.9%  | 20.8%        |
| EU Associated Countries | 36.1%   | 38.6%   | 8.4%  | 16.9%        |
| Third Countries         | 38.3%   | 37.4%   | 4.7%  | 19.6%        |

## The efforts to participate in Horizon Europe compared to other research and innovation programmes – breakdown by type of respondents

Table 30: The effort needed to participate in Horizon Europe compared to that of other research and innovation programmes was:

| TYPE OF RESPONDENT                  | N   | GREATER | SIMILAR | LOWER | I DON'T KNOW |
|-------------------------------------|-----|---------|---------|-------|--------------|
| Academic/research institution       | 803 | 41.8%   | 35.5%   | 7.3%  | 15.3%        |
| Company/business organisation       | 38  | 34.2%   | 31.6%   | 13.2% | 21.1%        |
| EU citizen                          | 270 | 27.4%   | 36.7%   | 11.9% | 24.1%        |
| Public authority                    | 3   | 33.3%   | 0.0%    | 0.0%  | 66.7%        |
| Other                               | 194 | 38.1%   | 28.4%   | 6.2%  | 27.3%        |
| Non-governmental organisation (NGO) | 35  | 28.6%   | 48.6%   | 2.9%  | 20.0%        |
| Business association                | 65  | 30.8%   | 23.1%   | 10.8% | 35.4%        |
| Non-EU citizen                      | 82  | 24.4%   | 32.9%   | 4.9%  | 37.8%        |
| Environmental organisation          | 83  | 30.1%   | 27.7%   | 3.6%  | 38.6%        |
| Trade union                         | 2   | 50.0%   | 0.0%    | 0.0%  | 50.0%        |



## Costs of proposal preparation – breakdown by country group

Table 31: Approximately, how much time did the proposal preparation for Horizon Europe take overall? Please indicate the total number of person-days. (EU14 N= 1 105; EU13 N= 166; EU Associated Countries N= 77; Third Countries N= 92)

| RESPONSE OPTIONS                       | EU14  | EU13  | EU ASSOCIATED COUNTRIES | THIRD COUNTRIES |
|--|-------|-------|-------------------------|-----------------|
| Less than 10 person-days               | 1.8%  | 3.6%  | 2.6%                    | 5.4%            |
| More than 10 but below 20 person-days  | 7.2%  | 7.8%  | 10.4%                   | 9.8%            |
| More than 20 but below 30 person-days  | 15.0% | 10.8% | 16.9%                   | 17.4%           |
| More than 30 but below 40 person-days  | 11.7% | 12.7% | 14.3%                   | 8.7%            |
| More than 40 but below 50 person-days  | 15.8% | 15.7% | 18.2%                   | 19.6%           |
| More than 50 but below 60 person-days  | 14.7% | 13.9% | 7.8%                    | 8.7%            |
| More than 60 but below 100 person-days | 14.7% | 14.5% | 14.3%                   | 5.4%            |
| More than 100 person-days              | 19.1% | 21.1% | 15.6%                   | 25.0%           |

## Costs of proposal preparation – breakdown by type of respondents

Table 32: Approximately, how much time did the proposal preparation for Horizon Europe take overall? Please indicate the total number of person-days.

| TYPE OF RESPONDENT                         | <10 M/DAYS | 10 - 20 M/DAYS | 20 - 30 M/DAYS | 30 - 40 M/DAYS | 40 - 50 M/DAYS | 50 - 60 M/DAYS | 60 - 100 M/DAYS | >100 M/DAYS |
|--|------------|----------------|----------------|----------------|----------------|----------------|-----------------|-------------|
| Academic/research institution (N=755)      | 1.5%       | 4.4%           | 9.9%           | 16.0%          | 12.8%          | 15.4%          | 24.2%           | 15.8%       |
| Company/business organisation (N=256)      | 3.9%       | 12.5%          | 13.7%          | 17.6%          | 11.3%          | 10.5%          | 14.8%           | 15.6%       |
| EU citizen (N=176)                         | 2.3%       | 5.1%           | 10.2%          | 15.9%          | 22.2%          | 17.6%          | 13.1%           | 13.6%       |
| Other (N=69)                               | 0.0%       | 14.5%          | 18.8%          | 8.7%           | 18.8%          | 13.0%          | 10.1%           | 15.9%       |
| Public authority (N=64)                    | 6.3%       | 18.8%          | 12.5%          | 17.2%          | 10.9%          | 7.8%           | 17.2%           | 9.4%        |
| Non-governmental organisation (NGO) (N=55) | 0.0%       | 12.7%          | 20.0%          | 7.3%           | 14.5%          | 14.5%          | 20.0%           | 10.9%       |
| Business association (N=32)                | 3.1%       | 6.3%           | 9.4%           | 28.1%          | 15.6%          | 9.4%           | 12.5%           | 15.6%       |
| Non-EU citizen (N=29)                      | 10.3%      | 13.8%          | 20.7%          | 31.0%          | 3.4%           | 3.4%           | 10.3%           | 6.9%        |
| Environmental organisation (N=2)           | 0.0%       | 50.0%          | 0.0%           | 0.0%           | 0.0%           | 0.0%           | 50.0%           | 0.0%        |
| Trade union (N=2)                          | 0.0%       | 0.0%           | 0.0%           | 0.0%           | 0.0%           | 100.0%         | 0.0%            | 0.0%        |

## Effectiveness of the European partnerships and EU Missions supported by Horizon Europe compared to regular collaborative research – breakdown by type of respondent

Table 33: In your opinion, to what extent are European Partnerships supported by Horizon Europe effective compared to regular collaborative research projects in achieving Horizon Europe's objectives? Breakdown by type of respondent.

| TYPE OF RESPONDENT                  | N   | TO GREAT<br>EXTENT | SOMEWHAT | NEUTRAL | A LITTLE | NOT AT<br>ALL | I DON'T<br>KNOW |
|-------------------------------------|-----|--------------------|----------|---------|----------|---------------|-----------------|
| Academic/research institution       | 789 | 20.2%              | 22.2%    | 9.8%    | 7.2%     | 3.4%          | 37.3%           |
| Company/business organisation       | 264 | 30.3%              | 19.3%    | 6.8%    | 2.7%     | 1.9%          | 39.0%           |
| EU citizen                          | 188 | 14.9%              | 23.9%    | 12.2%   | 2.7%     | 6.4%          | 39.9%           |
| Public authority                    | 83  | 21.7%              | 24.1%    | 10.8%   | 4.8%     | 4.8%          | 33.7%           |
| Other                               | 80  | 32.5%              | 22.5%    | 8.8%    | 6.3%     | 2.5%          | 27.5%           |
| Non-governmental organisation (NGO) | 62  | 19.4%              | 21.0%    | 9.7%    | 9.7%     | 0.0%          | 40.3%           |
| Business association                | 38  | 60.5%              | 18.4%    | 0.0%    | 2.6%     | 0.0%          | 18.4%           |
| Non-EU citizen                      | 34  | 35.3%              | 11.8%    | 2.9%    | 5.9%     | 8.8%          | 35.3%           |
| Environmental organisation          | 3   | 0.0%               | 33.3%    | 33.3%   | 0.0%     | 0.0%          | 33.3%           |
| Trade union                         | 2   | 100.0%             | 0.0%     | 0.0%    | 0.0%     | 0.0%          | 0.0%            |

Table 34: In your opinion, to what extent are EU Missions supported by Horizon Europe effective compared to regular collaborative research projects in achieving Horizon Europe's objectives?

| TYPE OF RESPONDENT                  | N   | TO GREAT EXTENT | SOMEWHAT | NEUTRAL | A LITTLE | NOT AT ALL | I DON'T KNOW |
|-------------------------------------|-----|-----------------|----------|---------|----------|------------|--------------|
| Academic/research institution       | 784 | 14.2%           | 19.1%    | 10.3%   | 5.7%     | 8.0%       | 42.6%        |
| EU citizen                          | 261 | 8.4%            | 18.0%    | 9.2%    | 5.7%     | 2.3%       | 56.3%        |
| Other                               | 188 | 11.2%           | 18.6%    | 11.7%   | 5.9%     | 6.4%       | 46.3%        |
| Environmental organisation          | 81  | 11.1%           | 30.9%    | 13.6%   | 8.6%     | 4.9%       | 30.9%        |
| Non-EU citizen                      | 80  | 15.0%           | 26.3%    | 10.0%   | 7.5%     | 10.0%      | 31.3%        |
| Business association                | 64  | 10.9%           | 15.6%    | 7.8%    | 12.5%    | 9.4%       | 43.8%        |
| Company/business organisation       | 37  | 0.0%            | 18.9%    | 18.9%   | 10.8%    | 5.4%       | 45.9%        |
| Non-governmental organisation (NGO) | 34  | 23.5%           | 14.7%    | 2.9%    | 11.8%    | 2.9%       | 44.1%        |
| Public authority                    | 3   | 0.0%            | 33.3%    | 33.3%   | 0.0%     | 0.0%       | 33.3%        |
| Trade union                         | 2   | 0.0%            | 0.0%     | 50.0%   | 50.0%    | 0.0%       | 0.0%         |

Table 35: To what extent do you agree with the following statement: the rationalisation of European Partnerships has allowed additional public and private investments in research and innovation to be leveraged. Breakdown by cluster of interest of the respondent.<sup>226</sup>

|                            | CLUSTER 1 (N=640) | CLUSTER 2 (N=469) | CLUSTER 3 (N=472) | CLUSTER 4 (N=820) | CLUSTER 5 (N=900) | CLUSTER 6 (N=677) |
|----------------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
| Strongly agree             | 6%                | 5%                | 7%                | 9%                | 9%                | 6%                |
| Agree                      | 24%               | 25%               | 23%               | 26%               | 24%               | 24%               |
| Neither agree nor disagree | 19%               | 19%               | 20%               | 20%               | 21%               | 19%               |
| Disagree                   | 9%                | 8%                | 10%               | 9%                | 9%                | 10%               |
| Strongly disagree          | 2%                | 2%                | 2%                | 2%                | 2%                | 2%                |

<sup>226</sup> The same respondent could select one or more clusters.

|                            |     |     |     |     |     |     |
|----------------------------|-----|-----|-----|-----|-----|-----|
| I do not know / No opinion | 40% | 41% | 38% | 34% | 35% | 39% |
|----------------------------|-----|-----|-----|-----|-----|-----|

Table 36: To what extent do you agree with the following statement: the rationalisation of European Partnerships has led to delivering more solutions for the benefits of society, the environment and the economy. Breakdown by cluster of interest of the respondent.<sup>227</sup>

|                            | CLUSTER 1<br>(N=640) | CLUSTER 2<br>(N=470) | CLUSTER 3<br>(N=472) | CLUSTER 4<br>(N=817) | CLUSTER 5<br>(N=897) | CLUSTER 6<br>(N=674) |
|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| Strongly agree             | 6%                   | 6%                   | 6%                   | 8%                   | 8%                   | 6%                   |
| Agree                      | 19%                  | 21%                  | 20%                  | 22%                  | 23%                  | 23%                  |
| Neither agree nor disagree | 23%                  | 21%                  | 23%                  | 24%                  | 23%                  | 22%                  |
| Disagree                   | 8%                   | 6%                   | 8%                   | 7%                   | 7%                   | 8%                   |
| Strongly disagree          | 4%                   | 4%                   | 4%                   | 4%                   | 3%                   | 3%                   |
| I do not know / No opinion | 41%                  | 42%                  | 38%                  | 36%                  | 36%                  | 38%                  |

Table 37: In your opinion, to what extent are European Partnerships supported by Horizon Europe effective compared to regular collaborative research projects in achieving Horizon Europe's objectives? Breakdown by cluster of interest of the respondent.<sup>228</sup>

|                            | CLUSTER 1<br>(N=635) | CLUSTER 2<br>(N=466) | CLUSTER 3<br>(N=471) | CLUSTER 4<br>(N=822) | CLUSTER 5<br>(N=899) | CLUSTER 6<br>(N=675) |
|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| To a great extent          | 18%                  | 18%                  | 21%                  | 27%                  | 26%                  | 21%                  |
| Somewhat                   | 25%                  | 27%                  | 26%                  | 24%                  | 25%                  | 24%                  |
| Neutral                    | 11%                  | 9%                   | 9%                   | 10%                  | 10%                  | 12%                  |
| A little                   | 7%                   | 8%                   | 8%                   | 6%                   | 7%                   | 8%                   |
| Not at all                 | 5%                   | 5%                   | 4%                   | 4%                   | 4%                   | 5%                   |
| I do not know / No opinion | 34%                  | 33%                  | 32%                  | 30%                  | 29%                  | 31%                  |

<sup>227</sup> The same respondent could select one or more clusters.

<sup>228</sup> The same respondent could select one or more clusters.

Table 38: In your opinion, to what extent are EU Missions supported by Horizon Europe effective compared to regular collaborative research projects in achieving Horizon Europe's objectives? Breakdown by cluster of interest of the respondent.<sup>229</sup>

|                            | CLUSTER 1<br>(N=631) | CLUSTER 2<br>(N=462) | CLUSTER 3<br>(N=467) | CLUSTER 4<br>(N=813) | CLUSTER 5<br>(N=892) | CLUSTER 6<br>(N=671) |
|----------------------------|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| To a great extent          | 12%                  | 12%                  | 11%                  | 11%                  | 12%                  | 14%                  |
| Somewhat                   | 20%                  | 23%                  | 19%                  | 21%                  | 24%                  | 20%                  |
| Neutral                    | 13%                  | 11%                  | 12%                  | 11%                  | 12%                  | 14%                  |
| A little                   | 9%                   | 9%                   | 9%                   | 8%                   | 7%                   | 8%                   |
| Not at all                 | 9%                   | 10%                  | 12%                  | 9%                   | 8%                   | 9%                   |
| I do not know / No opinion | 37%                  | 36%                  | 38%                  | 39%                  | 37%                  | 35%                  |

<sup>229</sup> The same respondent could select one or more clusters.



## Synergies with other EU programmes

Table 39: How do the following EU programmes work in synergy (complement and reinforce) Horizon Europe? **ERASMUS +**. Breakdown by part of Horizon Europe in which the respondent is interested / active.<sup>230</sup>

|   | N   | SEVERAL SYNERGIES EXPLOITED | SYNERGIES EXPLOITED FULLY |
|---|-----|-----------------------------|---------------------------|
| European Research Council                       | 615 | 29%                         | 11%                       |
| Marie Skłodowska-Curie Actions                  | 707 | 31%                         | 12%                       |
| European Research Infrastructures               | 469 | 29%                         | 10%                       |
| CLUSTER 1                                       | 614 | 29%                         | 11%                       |
| CLUSTER 2                                       | 452 | 31%                         | 12%                       |
| CLUSTER 3                                       | 459 | 27%                         | 8%                        |
| CLUSTER 4                                       | 795 | 27%                         | 9%                        |
| CLUSTER 5                                       | 879 | 25%                         | 9%                        |
| CLUSTER 6                                       | 657 | 28%                         | 9%                        |
| European Innovation Council                     | 510 | 25%                         | 8%                        |
| European Innovation Ecosystems                  | 343 | 30%                         | 11%                       |
| European Institute of Innovation and Technology | 357 | 33%                         | 10%                       |
| Widening and ERA                                | 480 | 32%                         | 10%                       |

<sup>230</sup> The respondents could select one or more programme parts.

Table 40: How do the following EU programmes work in synergy (complement and reinforce) Horizon Europe? **DIGITAL EUROPE PROGRAMME**. Breakdown by part of Horizon Europe in which the respondent is interested / active.<sup>231</sup>

|   | N   | SEVERAL SYNERGIES EXPLOITED | SYNERGIES FULLY EXPLOITED |
|---|-----|-----------------------------|---------------------------|
| European Research Council                       | 616 | 21%                         | 6%                        |
| Marie Skłodowska-Curie Actions                  | 708 | 20%                         | 7%                        |
| European Research Infrastructures               | 469 | 27%                         | 7%                        |
| CLUSTER 1                                       | 619 | 25%                         | 7%                        |
| CLUSTER 2                                       | 454 | 26%                         | 9%                        |
| CLUSTER 3                                       | 462 | 28%                         | 9%                        |
| CLUSTER 4                                       | 806 | 26%                         | 9%                        |
| CLUSTER 5                                       | 884 | 20%                         | 8%                        |
| CLUSTER 6                                       | 663 | 23%                         | 8%                        |
| European Innovation Council                     | 515 | 26%                         | 7%                        |
| European Innovation Ecosystems                  | 345 | 28%                         | 11%                       |
| European Institute of Innovation and Technology | 360 | 29%                         | 12%                       |
| Widening and ERA                                | 481 | 25%                         | 9%                        |

<sup>231</sup> The respondents could select one or more programme parts.

Table 41: How do the following EU programmes work in synergy (complement and reinforce) Horizon Europe? **LIFE**. Breakdown by part of Horizon Europe in which the respondent is interested / active.<sup>232</sup>

|   | N   | SEVERAL SYNERGIES EXPLOITED | SYNERGIES FULLY EXPLOITED |
|---|-----|-----------------------------|---------------------------|
| European Research Council                       | 617 | 15%                         | 3%                        |
| Marie Skłodowska-Curie Actions                  | 708 | 15%                         | 5%                        |
| European Research Infrastructures               | 471 | 17%                         | 5%                        |
| CLUSTER 1                                       | 619 | 16%                         | 4%                        |
| CLUSTER 2                                       | 454 | 19%                         | 5%                        |
| CLUSTER 3                                       | 462 | 18%                         | 4%                        |
| CLUSTER 4                                       | 802 | 18%                         | 6%                        |
| CLUSTER 5                                       | 883 | 21%                         | 6%                        |
| CLUSTER 6                                       | 664 | 24%                         | 6%                        |
| European Innovation Council                     | 514 | 20%                         | 4%                        |
| European Innovation Ecosystems                  | 344 | 23%                         | 6%                        |
| European Institute of Innovation and Technology | 359 | 21%                         | 6%                        |
| Widening and ERA                                | 477 | 18%                         | 5%                        |

<sup>232</sup> The respondents could select one or more programme parts.

Table 42: How do the following EU programmes work in synergy (complement and reinforce) Horizon Europe? **European Regional Development Fund**. Breakdown by part of Horizon Europe in which the respondent is interested / active.<sup>233</sup>

|   | N   | SEVERAL SYNERGIES EXPLOITED | SYNERGIES FULLY EXPLOITED |
|---|-----|-----------------------------|---------------------------|
| European Research Council                       | 614 | 18%                         | 5%                        |
| Marie Skłodowska-Curie Actions                  | 705 | 17%                         | 5%                        |
| European Research Infrastructures               | 470 | 20%                         | 6%                        |
| CLUSTER 1                                       | 616 | 18%                         | 4%                        |
| CLUSTER 2                                       | 453 | 19%                         | 5%                        |
| CLUSTER 3                                       | 460 | 18%                         | 4%                        |
| CLUSTER 4                                       | 797 | 19%                         | 5%                        |
| CLUSTER 5                                       | 880 | 18%                         | 5%                        |
| CLUSTER 6                                       | 661 | 19%                         | 4%                        |
| European Innovation Council                     | 511 | 18%                         | 4%                        |
| European Innovation Ecosystems                  | 344 | 22%                         | 6%                        |
| European Institute of Innovation and Technology | 357 | 23%                         | 5%                        |
| Widening and ERA                                | 478 | 21%                         | 5%                        |

<sup>233</sup> The respondents could select one or more programme parts.

## Annex 6 Description of synergies, by programme

The following text provides a summary of synergies found by the evaluation between Horizon Europe and other EU programmes identified in annex IV of the legal base. It is based on data collected through 5 impact area evaluation support studies<sup>234</sup> and a meta-analysis<sup>235</sup>.

Among programmes in shared management, **the ERDF** presents a clear case for synergies as one of its investment priorities focuses on innovation and support to SMEs, as well as digitisation and digital connectivity”, with the overall objective of fostering regional development and closing regional disparities.<sup>236</sup> In the *ex post* evaluation of Horizon Europe, findings on synergies with the ERDF were mixed: this fund’s programmes build human and infrastructural capacities needed to compete in Horizon 2020 but “measures to create synergies allowing the ERDF to deploy results of Horizon 2020 projects were hardly implemented”.<sup>237</sup> In the current MFF, synergies with the ERDF focused on:

- the Seal of Excellence (see separate section in the SWD),
- combined funding: Teaming, a type of Widening action, has been implemented with EUR 383 million of total EU contribution, and mobilised EUR 217 million from ERDF programmes for complementary funding,

Table 43: Combined funding through Teaming (ERDF)

| Country                                      | Overall budget (EUR) | ERDF (EUR)         | ERDF %       |
|--|----------------------|--------------------|--------------|
| PT   | 87,760,000           | 56,900,000         | 64.8%        |
| PL   | 79,976,317           | 21,600,000         | 27.0%        |
| CZ   | 50,035,742           | 32,390,068         | 64.7%        |
| CY   | 50,000,000           | 0                  | 0.0%         |
| EL   | 35,303,140           | 22,500,000         | 63.7%        |
| SK   | 31,935,000           | 18,103,500         | 56.7%        |
| EE   | 30,000,000           | 0                  | 0.0%         |
| ES70<br>Canary Islands<br>(Outermost region) | 30,000,000           | 0                  | 0.0%         |
| LT   | 25,032,000           | 24,552,000         | 98.1%        |
| LV   | 20,000,000           | 0                  | 0.0%         |
| SI   | 15,000,000           | 15,000,000         | 100.0%       |
| BG   | 15,000,000           | 12,750,000         | 85.0%        |
| HR   | 15,000,000           | 12,750,000         | 85.0%        |
| TR   | 10,000,000           | 0                  | 0.0%         |
| <b>TOTAL</b>                                 | <b>495,042,199</b>   | <b>216,545,568</b> | <b>43.7%</b> |

<sup>234</sup> All published in 2024, on Excellent Science: <https://data.europa.eu/doi/10.2777/2295765>, Resilient Europe: <https://data.europa.eu/doi/10.2777/797281>, Digital & Industrial Transition: <https://data.europa.eu/doi/10.2777/845650>, Green Transition: <https://data.europa.eu/doi/10.2777/67934>, Innovative Europe: <https://data.europa.eu/doi/10.2777/499132>

<sup>235</sup> Catalano G., Consiglio, G. and Delponte L. *Horizon Europe Internal and External Coherence (Synergies): Supporting the Interim Evaluation of Horizon Europe*. Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/5616419>

<sup>236</sup> Funding priorities presented at [https://ec.europa.eu/regional\\_policy/funding/erdf\\_en](https://ec.europa.eu/regional_policy/funding/erdf_en)

<sup>237</sup> SWD on the ex post evaluation of Horizon Europe, SWD(2024) 29 final, pp. 77-78.

Source: REA monitoring as of 6 December 2024

- transfers from ERDF to Horizon Europe - this is a new modality for creating synergies with the ERDF. As of May 2024, two Member States – Lithuania and Malta – transferred ERDF funds to Horizon Europe activities, under pillars 1 and 3. Lithuania has requested a transfer of EUR 18.5 million from ERDF to ERC, MSCA PF and WIDERA (ERA) for 2024 and 2025. In particular, out of a total of EUR 18.5 million, EUR 12.5 million was directed to the EIC and EUR 6 million to the Excellent Science and WIDERA pillars. Similarly, Malta has requested a transfer of EUR 5 million to Horizon Europe for the period 2023-2027, mainly for mono-beneficiary projects under Excellent Science, Innovative Europe and WIDERA.
- cumulative funding (e.g. ERDF as national contribution to European Partnerships – see separate section on Partnerships as a synergy mechanism in the main SWD),
- cooperation on the Regional Innovation Valleys (RIVs): The RIVs are supported by the European Innovation Ecosystems (EIE) and the ERDF's Interregional Innovation Investments (I3) instrument. Early findings showed that this synergy – not foreseen by design – was labour-intensive to implement.<sup>238</sup> More recently, 13 EIE regions declared that they will use the ERDF to co-fund 50% their activities.<sup>239</sup>

**ERASMUS+** is the programme where stakeholders responding to the public consultation perceived the most synergies with Horizon Europe: 35% reported that several synergies were being exploited or that they were fully exploited (518 respondents). The Erasmus+ Mobility Projects, facilitate the incorporation of participants into MSCA research teams via traineeships and staff exchanges, and the participation of MSCA researchers in Erasmus+-funded blended intensive programmes. The Erasmus+ European Universities Initiative and Horizon Europe have also demonstrated synergies, particularly through the MSCA. European University Alliances have participated in MSCA COFUND actions, linking projects to these alliances and fostering partnerships between European Universities and WIDERA projects. Moreover, Horizon Europe calls on the European Excellence Initiative foresee competitive calls for cooperation on the R&I dimension related to the ERA Policy Agenda. These calls are open to all types of alliances, including the European Universities alliances. European University alliances are also eligible to compete for other opportunities under Horizon Europe to fund transformative aspects (under the WIDERA (ERA) component) and collaborative research and innovation activities.<sup>240</sup>

With **InvestEU**, the *potential* for synergies was confirmed but evidence of its realization in practice has been challenging to obtain. The rationale for this synergy focuses on the EIC which bridges the funding gap for high-risk innovations until they are suitable for InvestEU co-financing. Up to 10% of EIC Accelerator calls (from 2021) can be allocated for blending with InvestEU instruments to support EIC Accelerator-selected companies, follow-on investments, or Seal of Excellence companies.<sup>241</sup> The Commission has found anecdotal evidence of the same companies being supported by the EIC and InvestEU, by comparing names of companies (but

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<sup>238</sup> Naujokaitytė, R., Cakić, M., Didžiulytė, M., Zharkalliu-Roussou, K. et al., Evaluation study of the European framework programmes for research and innovation for an innovative Europe, Publications Office of the EU, 2024, p. 92, <https://data.europa.eu/doi/10.2777/499132>

<sup>239</sup> EISMEA internal monitoring data, September 2024.

<sup>240</sup> Evaluation study on Excellent Science, 2024, p. 49.

<sup>241</sup> Innovative Europe evaluation study, 2024, p. 90, <https://data.europa.eu/doi/10.2777/499132>



lacking individual identifiers and other details). Limited reporting on the beneficiaries of indirectly managed programmes prevents more in-depth analysis of this synergy.<sup>242</sup>

With **EU4Health**, development of synergies focused on **coordination of work programmes and cross-referencing** to raise the applicants' awareness of complimentary interventions is underway between several programmes. The EU4Health Work Programmes invite applicants to build upon the results of Horizon Europe programme, especially EU Mission Cancer.<sup>243</sup> In turn, the WPs of Horizon Europe also make references to EU4Health initiatives, for example the networks of young cancer survivors established under EU4Health.<sup>244</sup> An examination of e-grants data (covering 50% of the EU4Health budget) shows a significant extent of cross-participation of entities, benefitting from both programmes (see Figure 124 below).

Evidence of synergies is similar with the **Connecting Europe Facility**: the main activities comprised cross-referencing of calls and knowledge exchange activities.<sup>245</sup> The CEF is also funding the EuroHPC JU. The Regulation establishing Horizon Europe foresaw that the synergy with CEF would consist in “large-scale roll-out and deployment of innovative new technologies and solutions in the fields of transport, energy and digital physical infrastructures”.

Horizon Europe's synergy with the **LIFE programme** focuses on the uptake of R&I results and their deployment at national, interregional and regional scale to help address environmental, climate or clean energy transition issues.<sup>246</sup> For Standard Action Projects, which represent the main type of grants, the LIFE programme awards bonus points to project proposals that are substantially building or scaling up the results of other EU programmes. In 2021-2023 calls, the bonus was granted to 184 projects for substantially building on or up-scaling the results of other European programmes – indicating mainly Horizon Europe.<sup>247</sup> Some activities supported by the LIFE programmes (focusing on demonstration of innovative solutions) are similar to activities implemented by the EU Missions in Horizon Europe.<sup>248</sup>

The Horizon Europe Regulation refers to potential synergies with the **European Defence Fund** (EDF), and the EDF Regulation states that ‘positive spill-over effects to the civilian sector can also be expected, where applicable’<sup>249</sup> and that ‘the Commission will take into account other

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<sup>242</sup> No individual identifiers of benefitting companies. No start and end dates of InvestEU support provided by, inter alia, the EIB, EIF (equity), CDP equity and the EIF (guarantees). See <https://www.eib.org/attachments/general/lists/investeu-final-recipients-beneficiaries-en.pdf>, [https://www.eif.org/InvestEU/guarantee\\_products/ieu-debt-visibility-report-final-recipients.pdf](https://www.eif.org/InvestEU/guarantee_products/ieu-debt-visibility-report-final-recipients.pdf), <https://www.eib.org/attachments/general/lists/investeu-final-recipients-beneficiaries-en.pdf> and [https://www.cdp.it/sitointernet/en/accordo\\_investeufund\\_cdpequity.page#:~:text=Please%20find%20in%20the%20table%20below%20the%20list](https://www.cdp.it/sitointernet/en/accordo_investeufund_cdpequity.page#:~:text=Please%20find%20in%20the%20table%20below%20the%20list).

<sup>243</sup> The study supporting the interim evaluation of EU4Health is forthcoming in 2025 and includes the list of relevant Work Programmes in an annex.

<sup>244</sup> For example, references to the EU-CAYAS-NET network or the ERN-Padcan initiatives, both supported by the EU4Health programme are included in the topic “HORIZON-MISS-2024-CANCER-01-05: Improving the understanding and management of late-effects in adolescents and young adults (AYA) with cancer”, Horizon Europe work programme 2023-2025, 12. Missions and Cross-cutting Activities (European Commission Decision C(2024) 2371 of 17 April 2024), pp. 94-96

<sup>245</sup> Green Transition evaluation support study, 2024, <https://data.europa.eu/doi/10.2777/67934>, p. 60.

<sup>246</sup> Annex IV of the regulation establishing Horizon Europe, point 9.

<sup>247</sup> CINEA internal monitoring of 2021-2023 calls as of October 2024. NB: the LIFE Clean Energy Transition sub-programme mainly uses Coordination and Support Actions, which do not use bonus points in project evaluation.

<sup>248</sup> Study supporting the interim evaluation of LIFE, forthcoming in 2025.

<sup>249</sup> Recital 35 of Regulation (EU) 2021/697 of the European Parliament and of the Council of 29 April 2021 establishing the European Defence Fund and repealing Regulation (EU) 2018/1092.

activities financed under Horizon Europe [...] in order to avoid unnecessary duplication and ensure cross-fertilisation and synergies between civil and defence research’.<sup>250</sup> The White Paper on options for enhancing support for research and development involving technologies with dual-use potential<sup>251</sup> reviews the existing R&D support framework which is characterised by a strict separation in EU funding for civil and defence R&D activities. This has implications for the exploitation and market uptake of results of technologies with dual-use potential. The White Paper found that the EU institutions continuously need to explore possible options to strengthen this cross-fertilisation in the context of R&D support involving technologies with a dual-use potential, while taking into account the fundamental differences between civil and military spheres. For this purpose, the Commission launched a public consultation on options for strategic support to technologies with a dual-use potential, whose results indicate an overall tendency mostly favourable to keeping civil and defence R&D separate, in particular among research institutions, NGOs and citizens.<sup>252</sup> Some public authorities, business associations and private companies showed more openness to removing the exclusive focus on civil applications subject to further discussion on the details of implementation.

When it comes to security resilience and EU preparedness, synergies are exploited between Horizon Europe (in particular Cluster 3) and **the Internal Security Fund (ISF), the Integrated Border Management Fund (IBMF), the European Maritime and Fisheries Fund (EMFF) and the civil protection mechanism**. These synergies aim to further the uptake of innovations and solutions developed by security research funded under Horizon Europe. A study on civil security research<sup>253</sup> reports that, to bridge the ‘Valley of Death’, stakeholders highlighted the potential to use security-related funding schemes, such as the ISF and IBMF, for funding targeted follow-up projects promoting market uptake.

While these options exist, beneficiaries may not always be aware of them and how to leverage them in combination with known funding sources.<sup>254</sup> Nevertheless, there are some examples of synergies such as the European Union’s Internal Security Fund Police project on drone detection, tracking and identification CORAGEOUS<sup>255</sup> which was based on the results of three Horizon 2020 projects: SafeShore<sup>256</sup>, ALFA<sup>257</sup> and ALADDIN.<sup>258</sup>

Security capabilities addressed by Cluster 3 are focussing on civil end-users, which have different needs from defence/military users, thus limiting potential synergies. While certain technologies have a dual use potential (e.g. cybersecurity or drones), especially at low-TRL level, the technological requirements will differ depending on the intended final use (civil or military), which means that higher TRL projects are by nature rarely dual use. While synergies between civil and defence research can be exploited, innovators also want to ensure that both civil and defence capabilities are supported.<sup>259</sup> To facilitate this, the ISF and IBMF published

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<sup>250</sup> Recital 33 of Regulation (EU) 2021/697 of the European Parliament and of the Council of 29 April 2021 establishing the European Defence Fund and repealing Regulation (EU) 2018/1092.

<sup>251</sup> COM (2024) 27 of 24.01.2024

<sup>252</sup> [https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14060-RD-on-dual-use-technologies-options-for-support\\_en](https://ec.europa.eu/info/law/better-regulation/have-your-say/initiatives/14060-RD-on-dual-use-technologies-options-for-support_en)

<sup>253</sup> “2024 Study on Strengthening EU-Funded Security Research and Innovation - 20 Years of EU-Funded Civil Security Research and Innovation”, p.105 (forthcoming).

<sup>254</sup> Ibid, p. 110.

<sup>255</sup> <https://courageous-isf.eu/>

<sup>256</sup> <https://cordis.europa.eu/project/id/700643>

<sup>257</sup> <https://cordis.europa.eu/project/id/700002>

<sup>258</sup> <https://cordis.europa.eu/project/id/740859>

<sup>259</sup> European Commission, DG HOME, Study on Strengthening EU-Funded Security Research and Innovation - 20 Years of EU-Funded Civil Security Research and Innovation, forthcoming in 2025, p. 41.

dedicated calls supporting the testing, validation or deployment of new methods and technologies resulting from Horizon Europe projects.<sup>260</sup>

With the **Digital Europe Programme**, as shown in Figure 124 further below, there is a noteworthy level of cross-participation: 1 512 common participants (representing 50% of DEP beneficiaries in the 70% of its budget that is visible in e-grants). The public consultation on Horizon Europe also shows that “synergies were (fully) exploited” with the DEP (62%; 838 respondents). Collaboration between the responsible Commission services (e.g., joint design of calls, evaluation of proposals and workshops) fosters synergies between Cluster 3 and DEP and more specifically enabling digital actions to capitalize on outputs from Cluster 3 and its predecessors.<sup>261</sup>

Synergies with the **Recovery and Resilience Facility (RRF)** were foreseen in the Horizon Europe’s legal base through the take-up and deployment of innovative solutions, making Member States economies and society more resilient and better prepared for the future. As of December 2023, five Member States (BG, CZ, EL, ES, SK) have leveraged synergies between Horizon Europe and the RRF by supporting projects with the EIC Seal of Excellence<sup>262</sup>. The Work programme of MSCA under Horizon Europe also encourages synergies with the Cohesion policy funds and the RRF, notably in COFUND and the Seal of Excellence.

In addition, a new instrument, Pathways to Synergies, has been established to stimulate synergies between Horizon Europe and the RRF: focusing on human resource development and internationalization (so-called upstream synergies) and the valorization and upscaling of research results into marketable solutions (downstream from Horizon Europe). A call for proposals was launched in March 2023, with projects starting in June 2024. This is a rather complex instrument requiring significant effort from the National Contact Points.<sup>263</sup>

With the **Common Agricultural Policy (CAP)**, synergies have been identified only with Cluster 6, as the CAP Network<sup>264</sup> (established in 2023) raises awareness about Horizon Europe Cluster 6 projects and Mission Soil<sup>265</sup>. The Horizon Europe regulation foresaw a broader synergy with “the CAP making the best use of R&I results and promoting the use, implementation and deployment of innovative solutions”.

For the **Single Market Programme (SMP)**, the Regulation establishing Horizon Europe foresaw a synergy through the Enterprise Europe Network (EEN) and this was confirmed by the evaluation (an improvement to the Horizon 2020 period when no synergies were found<sup>266</sup>). The EEN provides information on various types of EU funding and alternative sources of finance tailored to the specific needs of SMEs. In addition, there is a collaboration between the EIT and SMP, where the EIT has received a budget of EUR 4 million from the SMP to establish the European Solar Academy.<sup>267</sup> This initiative facilitates the upskilling and reskilling of the

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<sup>260</sup> Five dedicated calls in 2021-2024: ISF/2022/SA/3.4.1, BMVI/2021-2022/SA/1.2.1, BMVI/2024/SA/1.1.5, ISF/2024/SA/3.4.2, ISF/2024/SA/3.4.1.

<sup>261</sup> Resilient Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/797281>, p. 71.

<sup>262</sup> Innovative Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/499132>, p. 91.

<sup>263</sup> Evaluation study on Excellent Science, 2024, p. 225, <https://data.europa.eu/doi/10.2777/2295765>.

<sup>264</sup> The EU CAP Network is a forum through which the National CAP Networks, organisations, administrations, researchers, entrepreneurs and practitioners can share knowledge and information (e.g. via peer-to-peer learning and good practices) about agriculture and rural policy. [https://eu-cap-network.ec.europa.eu/index\\_en](https://eu-cap-network.ec.europa.eu/index_en)

<sup>265</sup> Green Transition evaluation study, 2024, p. 59-61.

<sup>266</sup> Study on the external coherence and synergies of Horizon 2020, 2023, p. 81.

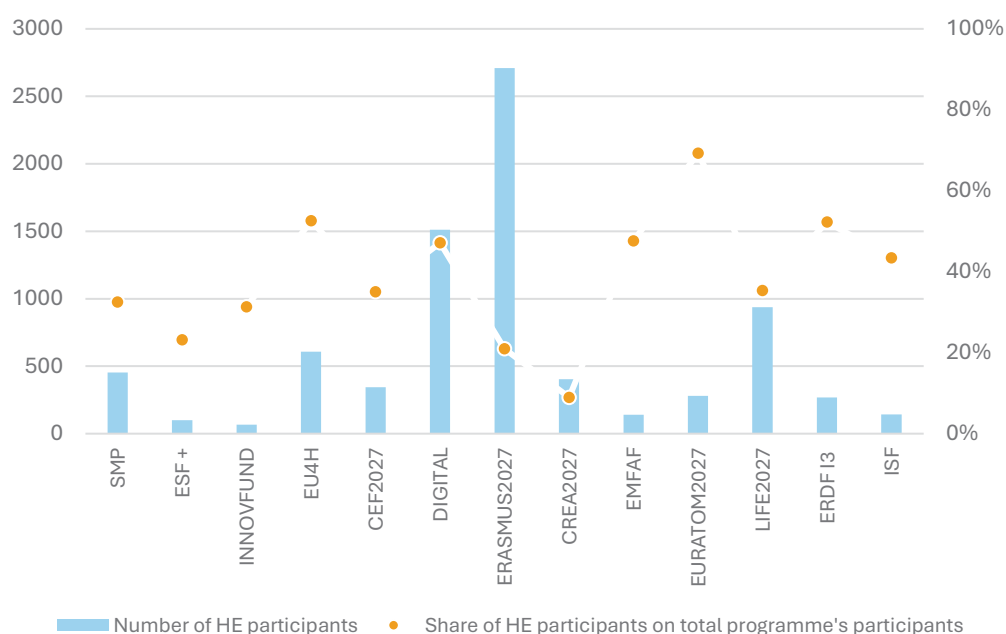
<sup>267</sup> Call SMP-COSME-2024-EIT-EUSOLARACADEMY.

solar photovoltaic technologies workforce, with a specific focus on SMEs, through education and training providers in EU Member States.<sup>268</sup>

With the **Union Space Programme (USP)**, the synergy revolves around bolstering innovation among SMEs in the space sector. The EIC integrates regular space challenges into its work programmes and its beneficiaries have expedited access to key Horizon Europe Cluster 4 activities, including the CASSINI business accelerator.<sup>269</sup> While it is not possible for both frameworks to procure together, cooperation is organised around activities of both initiatives such as hackathons or matchmaking.<sup>270</sup> Within Cluster 4, synergies have developed with the European Space Agency (ESA) – the Technology Mapping Exercise plays a role in avoiding overlap and duplication between the EU and ESA activities.<sup>271</sup> The approach adopted for Cluster 4 includes the Cassini accelerator, an EU initiative aimed at supporting startups and SMEs in the space sector. It provides tailored business development services, mentoring, and access to funding opportunities to help these companies grow and scale their innovations.<sup>272</sup>

For grants directly managed by the Commission services, data is available on participants who engage in both Horizon Europe and other EU programmes<sup>273</sup> (see figure below). This data indicates of the strongest *potential* synergies between Horizon Europe and Erasmus+, Digital Europe Programme and LIFE.

Figure 124: Cross-participants between Horizon Europe and other programmes managed in e-grants



Source: e-grants data extracted on 28 February 2024

Note: only 10-20% of ISF and ERASMUS+ projects is managed in e-grants. EU4Health data in e-grants is limited to around 50% of the budget, while for DEP this share is 70%.

<sup>268</sup> Innovative Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/499132>, pages 88-89.

<sup>269</sup> The accelerator is part of the broader CASSINI Space Entrepreneurship Initiative, which seeks to foster innovation and competitiveness in the European space industry by leveraging EU space assets and data.

<sup>270</sup> Digital and Industrial Transition evaluation study, 2024, p. 114.

<sup>271</sup> Ibid, Annex V - Stakeholders' consultations results and synopsis report, p. 65.

<sup>272</sup> Innovative Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/499132>, p. 91.

<sup>273</sup> Data are available only for 13 programmes, including Horizon Europe.

There are 67 entities benefitting both from the **Innovation Fund under the Emission Trading Scheme** and Horizon Europe (31% of total Innovation Fund's participants as of 28 February 2024). This is not necessarily indicative of the degree of synergies between the two programmes, but shows the interest of entities in applying to different EU funding programmes. They received a relatively high amount of resources, € 3 billion amounting to 46.6% of total Innovation Fund budget as of the reference date. Horizon Europe work programmes encourage applicants to include in their proposals a business case strategy and feasibility study with a view towards possible future applications for the Innovation Fund. In this context, five coordination and support actions (CSA) have been launched, with consortia consisting of participants from mature Horizon 2020 projects, to promote the dissemination of best practices and produce sound Innovation Fund applications. According to CINEA, out of the 34 Horizon 2020 projects considered potentially mature/relevant for an Innovation Fund application and involved as beneficiaries in the CSAs, five are in the process of preparing an application for the call closing in April 2025.

In order to further explore these potential synergies and cross-participation in EU programmes, text analysis of project abstracts offers additional insights.<sup>274</sup> Projects identified as highly similar to Horizon Europe's were more frequently funded by Euratom and ERDF I3 – 85% of all these project pairs were rated as highly similar. This level of similarity was less frequently found with projects funded by Creative Europe, ESF+, ERASMUS+ and the SMP. Almost all (94%) of the identified project pairs were concurrent rather than sequential – not surprising considering the relatively early stage of programme implementation. With Creative Europe, ESF+, Euratom – the evaluation found relatively limited evidence of synergies.

The **Creative Europe** programme is complimentary to Cluster 2 (Destination culture and, to a lower extent, democracy). For instance, Creative Europe introduced a mobility scheme for artists and professionals, offering residencies and location-based cultural initiatives in line with the New European Bauhaus.<sup>275</sup> However, the remainder of Creative Europe programme (66% of its budget), covers subsectors such as the audiovisual industry, video games and news media – in these sectors, evidence of synergies was not found.

For the **Neighbourhood, Development and International Cooperation Instrument (NDICI)**, the synergies relate to the close interaction of the [Global Health EDCTP3 Joint Undertaking](#) (EUR 1.86 billion of which up to EUR 910 million from Horizon Europe) and the Team Europe Initiative on local manufacturing of vaccine and other medical products in Africa ([MAV+](#), EUR 1 billion from NDICI).<sup>276</sup> These initiatives are proposed in the [EU Global Health Strategy](#) that the Commission adopted in November 2022. This collaboration supports the process of bringing innovative products to citizens in Africa from end-to-end: research and development of innovative products, regulatory capacity for clinical trials and product approval, local production, and procurement and delivery to the population. Additionally, the DeSIRA initiative, which seeks to enhance an inclusive, sustainable and climate-relevant transformation of agrifood systems in low and medium income countries through R&I based

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<sup>274</sup> Between a Horizon Europe project and a project funded by one of the other EU programmes analysed (based on e-grants data availability). Catalano G., Consiglio, G. and Delponte L. *Horizon Europe Internal and External Coherence (Synergies): Supporting the Interim Evaluation of Horizon Europe*. Publications Office of the European Union, 2025, <https://data.europa.eu/doi/10.2777/5616419>

<sup>275</sup> Resilient Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/797281>, page 68.

<sup>276</sup> Resilient Europe evaluation study, 2024, <https://data.europa.eu/doi/10.2777/797281>, pages 66, 126



on multistakeholder approaches, is complementary to actions for food systems transformation supported by Horizon Europe.

The evaluation did not find evidence of synergies with the **Instrument for Pre-Accession Assistance (IPA III) and Just Transition Mechanism**.

Several **networks** facilitate the development of synergies: the R&I and Cohesion Management Authorities (RIMA) network of MS representatives<sup>277</sup>, the Seal of Excellence Community of Practice (management bodies implementing the Seal, with DG REGIO) and an interservice group of Commission DGs focusing on synergies (coordinated by DG RTD).

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<sup>277</sup> More information is available at <https://ec.europa.eu/transparency/expert-groups-register/screen/expert-groups/consult?lang=en&groupID=103692>



## Annex 7 European Partnerships: Leverage analysis

### Glossary

| Term   | Meaning or definition   |
|--|---|
| <b>Co-investment (or ‘direct call leverage’)</b> | In R&I projects, the difference between the project’s total eligible costs and the EU contribution to the project. This is equal to Key Impact Pathway 9, short-term indicator (‘co-investment’).   |
| <b>Total direct leverage</b>                     | <p>For European partnerships only: co-investment plus additional activities linked to the goal of the partnership, where applicable. It therefore represents the difference between the total costs of the partnership’s R&amp;I activities (operational project costs, and additional activities) and the EU’s contribution to such activities. Contributions to the partnership’s administrative costs are not included.</p> <p>For non-partnerships, or partnerships without additional activities, this indicator is identical to co-investment.</p>  |
| <b>Leverage factor</b>                           | <p>The ratio (expressed as a number or a value in euro) between the total costs borne by partners other than the EU for R&amp;I activities and the EU contribution to R&amp;I activities.</p> <p>It is calculated for all measures of leverage set out above.</p> <p>For co-investment, the formula is: <math>CA_{Part} / CA_{EU}</math></p> <p>And for total direct leverage (including additional activities): <math>(CA_{Part} + AA_{Part}) / (CA_{EU} + AA_{EU})</math>.</p> <p>No financial data is available for this evaluation on additional activities funded by the EU (<math>AA_{EU}</math>) which therefore equals to zero: this means other funding sources with their origin in the EU budget, such as cohesion policy funds, are not accounted for in additional activities.</p> |
| <b>Funding rate</b>                              | The EU contribution to a project as a percentage of a project’s total eligible costs. Also ‘reimbursement rate’.  |
| <b>Co-funding rate</b>                           | The partners’ contribution to a project (see ‘co-investment’) as a percentage of the total eligible costs of that project. It is the opposite of the funding rate. It differs from the leverage factor, as the denominator is the total project costs, not the EU contribution to the project.  |

## Is Horizon Europe leveraging additional resources for R&I?

The simplest measure of financial leverage of Horizon Europe is the **co-investment** (also ‘co-funding’) by participants in R&I projects. This is the proportion of project costs that, while eligible for reimbursement, are not covered by the grant provided by the EU – the measure that the EU Financial Regulation calls ‘**leverage effect**’<sup>278</sup>. This measure is monitored as the short-term indicator of Key Impact Pathway 9 (‘Co-investment – Amount of public & private investment mobilised with the initial investment from the Programme’).

As of 6 January 2025, project participants invested a total of EUR 10.17 billion of their own resources in Horizon Europe projects. This is equivalent to a leverage factor of 0.236: in other words, each euro the EU is investing in Horizon Europe R&I projects directly attracts additional R&I investment of about EUR 0.24. To date, the programme-wide leverage factor for Horizon Europe is identical to the ratio observed in Horizon 2020 projects (0.236).

Direct leverage factor of Horizon Europe programme parts based on project co-investment vary widely. In several programme parts, particularly in Pillar 1 and in WIDERA actions, but also in Cluster 2 under Pillar II, EU contribution covers essentially all project costs (leverage factor of zero). Some programme parts instead have much higher leverage factors than the average for Horizon Europe. These are broadly the ones where there is higher industry participation (e.g. Cluster 4 and Cluster 5 under Pillar II, as well as the EIC), or where all or a prominent part of the budget is allocated to European Partnerships (EIT, EIE).

Table 44: Co-investment rates of Horizon Europe programme parts

| Programme part  | Leverage factor |
|---|-----------------|
| European Research Council (ERC)                                       | 0.001           |
| Marie Skłodowska-Curie Actions (MSCA)                                 | 0.04            |
| Research infrastructures  | 0.09            |
| <b>Total Pillar 1</b>   | <b>0.02</b>     |
| CL1 - Health  | 0.29            |
| CL2 - Culture, creativity and inclusive society                       | 0.01            |
| CL3 - Civil Security for Society                                      | 0.10            |
| CL4 - Digital, Industry and Space                                     | 0.36            |
| CL5 - Climate, Energy and Mobility                                    | 0.35            |
| CL6 - Food, Bioeconomy Natural Resources, Agriculture and Environment | 0.22            |
| <b>Total Pillar 2</b>   | <b>0.30</b>     |
| The European Innovation Council (EIC) (grants only)                   | 0.38            |
| European innovation ecosystems  | 1.57            |
| The European Institute of Innovation and Technology (EIT)             | 0.39            |
| <b>Total Pillar 3</b>   | <b>0.45</b>     |
| Widening participation and spreading excellence                       | 0.003           |
| Reforming and enhancing the European R&I System                       | 0.02            |
| <b>Total Pillar 4 (WIDERA)</b>  | <b>0.004</b>    |
| <b>Total Horizon Europe</b>   | <b>0.24</b>     |

Source: CORDA, data as of 6 January 2025.

For partnerships with cascading grant (EIT KICs, co-funded partnerships), the leverage factor is calculated based on the grant initiating the partnership (*ex ante* value) rather than on actual activities.

<sup>278</sup> EU Financial Regulation, art. 2(40) (“Definitions”).

Wherever available – particularly for EIT KICs – the rest of this annex uses data based on implemented activities of the partnership.

The co-investment rate is primarily a function of the funding rate for each action, which is defined by the Commission in advance<sup>279</sup>. However, even within the same type of action or the same consortium, participants may be reimbursed differently: in general, costs from private for-profit entities are covered to a lesser extent than those of universities or non-profit organisations<sup>280</sup>.

Table 45: Co-investment rates of main Horizon Europe types of action

| Type of action                            | Leverage factor<br>(co-investment to<br>Horizon Europe<br>projects) |
|---|---|
| Coordination and support actions (CSA)    | 0.03  |
| European Innovation Council (grants only) | 0.39  |
| European Research Council                 | 0.001   |
| Innovation actions (IA)                   | 0.22  |
| Joint undertakings (JU)                   | 0.8   |
| Marie Skłodowska-Curie Actions (MSCA)     | 0.04  |
| Research and innovation actions (RIA)     | 0.02  |

Source: CORDA, data as of 6 January 2025.

For each euro of EU contribution, Horizon Europe leveraged EUR 0.49 in co-investment from private for-profit entities (EUR 5.8 billion), roughly the same ratio observed in Horizon 2020. SMEs contributed EUR 2.6 billion in own funding to support project costs, equivalent to a co-investment ratio of 0.36 (an increase from 0.33 at the end of Horizon 2020). For comparison, co-investment from higher education institutions is EUR 0.03 per euro invested by the EU.

<sup>279</sup> In fundamental research actions (such as research and innovation actions or European Research Council grants), the EU contribution covers in principle all project costs (100% reimbursement rate). For applied research actions, such as innovation actions and most European Innovation Council grants, the reimbursement rates are lower.

<sup>280</sup> There is also the case of non-associated third-country participants from high-income countries, which in most cases are not eligible for funding. However, since they do not submit eligible costs declarations, this analysis cannot take into account the co-investment leveraged from these participants.

Among the main types of actions, **joint undertakings (JUs)** have, the highest leverage factor (0.8 as of January 2025), mainly due to their design. In the average JU project, 55% of total eligible costs are covered by the EU, and the remaining 45% by project participants. Co-investment ratios in JUs are higher for participants classified as for-profit companies: they brought in additional resources for projects in the amount of EUR 2.83 billion, a direct leverage factor of EUR 1.23 per each euro in EU contribution the projects received. Out of this, at least EUR 2.17 billion comes specifically from privately-owned enterprises, and at least EUR 313 million from state-controlled enterprises<sup>281</sup>. These have a comparatively high leverage factor of 2.25 (against 1.15 for companies without public ownership).

However, the leverage potential of JUs – and, more generally, of European partnerships – goes beyond co-investment in projects. The rest of this section will present the available evidence on resources leveraged by European partnerships and highlight existing information and analysis gaps.

A distinction is made between institutionalised partnerships – which include JUs, public-public Article 185 (TFEU) initiatives, and EIT Knowledge and Innovation Communities (KICs) – and non-institutionalised co-programmed and co-funded partnerships. In general, data availability on leverage is better for institutionalised partnerships. This is the effect of stricter reporting requirements on these types of partnerships.

### **Leverage of European Partnerships: an overview**

Achieving a ‘strong leverage effect on a sufficient scale’ is a legal requirement for European Partnerships<sup>282</sup>. The legal base of the programme also requires partnerships to provide ‘information on quantitative and qualitative leverage effects, including on committed and actually provided financial and in-kind contributions’.<sup>283</sup>

Examining co-investment alone shows that partnerships do indeed leverage higher resources than

Box 9: What are additional activities of partnerships?

For European Partnerships, **additional activities** are activities arranged by the partnership and implemented under the responsibility of the partners. They do not receive EU funding, but that are linked and support the general objective of the partnership. They may include support to additional R&I projects, promotion of technologies and standards, training, communication activities, and others.

In Joint Undertakings, these activities are called “in-kind contributions to additional activities” (**IKAA**): private members often have to provide IKAA to match their legal contribution commitments. Most European Partnerships arrange, however, some forms of additional activities that are not funded by the Horizon Europe budget.

<sup>281</sup> Source on state ownership of Horizon Europe companies: LexisNexis World Compliance (through Orbis database). For around EUR 200 million in co-investment, no status in terms of state ownership can be determined.

<sup>282</sup> Regulation establishing Horizon Europe, art. 10(2), point (a).

<sup>283</sup> For all European Partnerships, Annex III of the Regulation establishing Horizon Europe, point 3 “Monitoring”, letter (b), and for JUs specifically, SBA Art. 171(2), letter f). The provision is identical in both sources.

the rest of the Framework Programme<sup>284</sup>. When all partnerships are removed, the leverage ratio for the ‘mainstream’ FP is around 0.09, equivalent to EUR 2.96 billion in co-investment. For partnerships the co-investment ratio is 0.62 (EUR 7.22 billion).

All types of partnerships also arrange **additional activities** (see Box 9). The monetised value of the members’ additional activities counts towards the partnership’s leverage objectives. For some partnerships, in particular the co-programmed ones, these activities represent the main source of leverage. However, availability and quality of data on additional activities varies – as does the level of oversight from the Commission on their content.

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<sup>284</sup> This indicator is called “direct call leverage” in the Biennial Monitoring Report on partnerships, with identical definition and calculation method.

## Key figures as of 31 December 2023

The following sections offer a state of play in terms of current<sup>285</sup> monetised contributions to R&I activities, by type of partnership and for each partnership. Administrative expenditure supporting the running costs of the partnership is not taken into account<sup>286</sup>.

The reference date for all sources (EU funding<sup>287</sup>, project co-investment, and additional activities) is 31 December 2023, the last date for which data on both co-investment in projects and additional activities are available for most partnerships. Only grants signed before this date are included in the analysis.

As intended by the design of different partnerships, the highest co-investment ratios are achieved by grants initiating co-funded European Partnerships (approximately 2:1) followed by other institutionalised partnerships (including joint undertakings and Article 185 public-to-public initiatives) and EIT KICs, while co-programmed partnerships have a lower leverage ratio of 0.15.

Once additional activities are included, leverage ratios for institutionalised partnerships increase significantly, with partners already contributing more to R&I activities than the EU contribution received to date (leverage factor higher than 1). The increase is particularly remarkable for co-programmed partnerships: the total amount of additional activities declared up to the end of 2023 is over three times as high as the EU contribution allocated to call activities, and considerably higher than the amounts declared by JUs.

Some institutionalised partnerships have a long track-record by now, having existed in a similar organisational setup for at least two programming periods (i.e. since before the start of Horizon 2020). In Horizon Europe, these ‘older’ partnerships have a substantially higher leverage factor than those that have been created more recently. In particular, the three older EIT KICs have a leverage factor including additional activities close to 3:1, but a gap between ‘older’ and ‘newer’ partnerships is also visible for the JUs.

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<sup>285</sup> This report uses contributions to projects that are stated in grant agreements, as they appear in the Commission’s monitoring systems (in most cases, the CORDA database). This is done even if the activities to be reimbursed by the Commission, and associated payments by beneficiaries, have not yet taken place. The main exception is the EIT, for which data from the EIT’s own monitoring system is used: this allows to keep track of the actual stage of implementation of the activities of the EIT KICs. For additional activities, only “incurred” costs are considered (regardless of whether they have been already certified by external auditors, which is a requirement for Joint Undertakings).

<sup>286</sup> For partnerships that manage their own call activities (such as Joint Undertakings), contributions to administrative costs form a steady revenue stream for and reflect a legal commitment by members. However, these costs in itself provide no indications on the capacity of the JU to stimulate additional funding for R&I activities.

<sup>287</sup> It is to be noted that some partnerships bring together several sources of EU funding. For instance, the EuroHPC Joint Undertaking is largely supported by resources from the Digital Europe programme; the Clean Steel co-programmed partnership also arranges calls supported by the Research Fund from Coal and Steel. This section takes into account all EU contribution (and co-investment) in activities from directly managed programmes.



Table 46: Contribution and leverage of European partnerships in Horizon Europe, by type, as of 31 December 2023

| Type of partnership       | Horizon Europe contribution (a) (EUR) | Other EU contribution (b) (EUR) | Participants co-investment in EU R&I projects (c) (EUR) | Additional activities of JU members, costs incurred (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|---------------------------|---------------------------------------|---------------------------------|---|---|---|--|
| JUs/Art.185               | 2 986 133 799                         | 187 108 681                     | 2 869 777 262   | 1 753 655 258   | 0.90  | 1.46   |
| <i>Older partnerships</i> | 2 108 863 823                         | 0                               | 2 445 045 874   | 1 259 902 814   | 1.16  | 1.76   |
| <i>Newer partnerships</i> | 877 269 976                           | 187 108 681                     | 424 731 388   | 493 752 444   | 0.40  | 0.86   |
| Co-programmed             | 3 126 851 284                         | 24 710 696                      | 472 755 667   | 10 113 314 067  | 0.15  | 3.36   |
| Co-funded                 | 750 858 915                           | unknown                         | 1 482 259 292   | not disclosed   | 1.97  | not disclosed  |
| EIT KICs                  | 1 014 095 224                         | unknown                         | 512 462 324   | 510 380 000   | 0.51  | 1.01   |
| <i>Older KICs</i>         | 256 905 842                           |                                 | 269 356 882   | 458 630 000   | 1.05  | 2.83   |
| <i>Newer KICs</i>         | 757 189 382                           |                                 | 243 105 443   | 51 750 000  | 0.32  | 0.39   |
| Total                     | 7 877 939 223                         | 211 819 377                     | 5 337 254 545   | 12 377 349 325  | 0.66  | 2.19 *   |

Sources: CORDA (Horizon Europe contribution and costs, for all excluding KICs and Art. 185), eGrants dashboard (other EU contribution and costs, for all excluding KICs and Art. 185), Annual Activity Reports of JUs (for additional activities), EIT monitoring system (for EIT KICs), additional activity reporting of co-programmed partnerships, partnership secretariat (for Art. 185 and procurement actions under EuroHPC JU). For lump sum projects, co-investment amounts are estimated based on ex-ante assumptions.

'Older' partnerships are initiatives that were launched before the start of Horizon 2020 under the same or similar legal form. 'Newer' partnerships were launched during Horizon 2020 or at the start of Horizon Europe. All partnerships that changed their form in Horizon Europe (e.g. GH-EDCTP3 and SNS JU) are considered 'newer'.

\* When additional activities are not disclosed, the values for call-level co-investment (column c) are used for this calculation. For some JUs and co-programmed partnerships, data on additional activities is not yet available (see dedicated sections).

## **Institutionalised partnerships**

### **Joint undertakings**

Main statistics about co-investment in JU Horizon Europe projects, as well as additional activities from JU members as of 31 December 2023, are available in Table 47.

Co-investment is defined here as the difference between total eligible project costs and EU contribution to project activities. This definition is consistent with the approach used in the entire Horizon Europe programme to estimate the same indicator.

The only partial exception is Europe's Rail JU, as it is the only JU where all projects have been supported through lump sum grants. The value presented in the table is an *ex-ante* estimate; JU administrative figures reported by the European Court of Auditors suggest that this may become an underestimate once all contributions from partners are validated <sup>288</sup>.

There is large variation across the JUs in leverage factors, whether additional activities are included or not. A finding common to almost all JUs is that equal contributions by EU and partners (leverage factor of 1) is not normally achieved through call activities alone. There are

<sup>288</sup> Since lump sum projects do not report costs, it is not possible to know directly from administrative sources the total co-investment. This analysis presents both estimated figures (based on expected funding rates) and the values of members' contributions presented in the 2023 Report on Joint Undertakings by the European Court of Auditors.

nonetheless two exceptions: the Clean Hydrogen JU and the Key Digital Technologies JU ('KDT', the current Chips JU), where co-investment from participants in projects significantly exceeds EU contribution.

In the case of KDT, the high co-investment ratio is linked to the 'tripartite' structure of the partnership, involving Member States alongside private partners. Part of the co-investment in projects consists of Member State contributions at the level of project beneficiaries. The Commission monitoring systems do not directly capture the extent of such contributions.<sup>289</sup> This would be particularly significant for assessing the amount of private co-investment in the EuroHPC JU, the other tripartite JU, where the majority of participants are universities and research organisations rather than private for-profit companies.

The nominal value of costs for additional activities varies between zero (KDT, EuroHPC<sup>290</sup>) and over EUR 900 million. For some partnerships, reporting on additional activities started only in 2023 (Circular Bio-based Enterprises JU, Innovative Health Initiative JU) or is incomplete at the reference date<sup>291</sup>, and therefore the figure may not be representative of future trends<sup>292</sup>. Nevertheless, it is already apparent that some JUs rely more on additional activities to leverage resources from partners. Two partnerships, Global Health-EDCTP3 (successor of an Article 185 partnership in Horizon 2020) and Smart Networks and Services (whose predecessor was a 'contractual public-private partnership', the equivalent of Horizon Europe's co-programmed partnerships) have fairly low leverage at call level, with most project participation covered by the EU. Even at this early stage of implementation, the vast majority of the funding they leveraged comes from expenditures on additional activities.

Table 47: Contribution and leverage of Joint Undertakings in Horizon Europe

| JU name   | Horizon Europe contribution (a) (EUR) | Other EU contribution (b) (EUR) | Participants' co-investment in EU R&I projects (c) (EUR) | Additional activities of JU members, costs incurred (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|-----------|---------------------------------------|---------------------------------|--|---|---|--|
| CBE       | 116 257 141                           | 0                               | 29 591 423   | 61 539 083  | 0.25  | 0.78   |
| CAJU      | 805 807 009                           | 0                               | 267 948 600  | 65 617 750 <sup>293</sup>                                     | 0.33  | 0.41*  |
| CLEANH2   | 498 985 785                           | 0                               | 873 864 986  | 930 463 076   | 1.75  | 3.62   |
| EuroHPC   | 45 905 466                            | 187 108 681                     | 223 022 492  | 0   | 0.96  | 0.96   |
| EURAIL    | 243 907 308                           | 0                               | 123 455 961<br>(146 100 000<br>***)                      | 69 944 330  | 0.51<br>(0.60 ***)                                | 0.79<br>(0.89 ***)   |
| GH-EDCTP3 | 103 090 624                           | 0                               | 18 520 603   | 152 821 896   | 0.18  | 1.66   |

<sup>289</sup> The Commission monitoring systems also cannot capture whether the resources brought in by Member States actually originate from the EU budget through shared management funds, such as cohesion funds and the ERRF.

<sup>290</sup> For EuroHPC: "As the EuroHPC Joint Undertaking's Council Regulation (EU) 2021/1173 does not provide for a legal base to collect IKAA from its private members, the Private members of the Joint Undertaking do not provide contributions in the form of IKAA" (EuroHPC annual accounts 2023, p. 50). For KDT: the Private members of the Chips Joint Undertaking do not provide contributions in the form of IKAA" (Annual accounts 2023, p. 23), even if there is the legal option to do so. Plausibly the members do not account for IKAA as the partnership achieves already high leverage through call-based activities.

<sup>291</sup> Clean Aviation JU, for which 2023 additional activities are missing.

<sup>292</sup> Partnership-specific annexes within this evaluation may include estimates of total additional activities planned by partners, as well as estimates of the expected leverage ratio over the entire partnership duration. This section only focuses on incurred costs reported at the end of 2023.

<sup>293</sup> Figures are for 2021 and 2022: incurred costs of in-kind additional activities for 2023 are not available in the 2023 Annual Report. The direct leverage factor is therefore underestimated compared to other JUs.

| JU name            | Horizon Europe contribution (a) (EUR) | Other EU contribution (b) (EUR) | Participants' co-investment in EU R&I projects (c) (EUR) | Additional activities of JU members, costs incurred (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|--------------------|---------------------------------------|---------------------------------|--|---|---|--|
| IHI                | 183 837 301                           | 0                               | 168 183 428  | 3 419 717   | 0.91  | 0.93   |
| KDT (now Chips JU) | 349 454 010                           | 0**                             | 878 293 945  | 0   | 2.51  | 2.51   |
| SESAR              | 203 081 665                           | 0                               | 168 449 916  | 193 300 000   | 0.83  | 1.78   |
| SNS                | 368 109 437                           | 0                               | 30 140 908   | 209 447 135   | 0.08  | 0.65   |

Source: CORDA (Horizon Europe contribution and costs), eGrants dashboard (other EU contribution and costs), Annual Activity Reports of JUs (for additional activities). For lump sum projects in EURAIL, the co-investment value is estimated based on *ex ante* coefficients.

\* For CAJU, additional activities for 2023 are not included, as they are not reported in the 2023 AAR.

\*\* No funding from Digital Europe was awarded at the reference date.

\*\*\* Value for 'Members' contributions' as of 31 December 2023, reported by Europe's Rail JU to the European Court of Auditors, and published in the annual report on EU Joint Undertakings for the financial year 2023. Both validated contributions (EUR 75.8 million) and contributions undergoing validation (EUR 70.3 million) are accounted for. The figure does not include contribution by non-JU members.

**Most JUs operating under Horizon Europe have a predecessor in Horizon 2020**, with some projects funded under the previous programme still being implemented by the successor partnership.

Table 48 presents data on main leverage indicators for these partnerships in the Horizon 2020.

For co-investment based on eligible project costs, the data is collected and calculated in the same process used for Horizon Europe – except for contributions from other EU spending programmes, which are not available to this evaluation.

For leverage measures including non-project activities, the methodology has been slightly adapted to reflect the different taxonomy used in Horizon 2020 on reporting of non-eligible costs borne by partners. Under the predecessor FP, some co-investment from JU members that today would be reported as 'additional activities' was reported and validated under the same umbrella as contribution to project activities. This means that, for some JUs, it is not possible to determine exactly the direct leverage factor including additional activities in the same way between the two programmes.

Despite some differences in methodology, the closest replacement is the data on JU members' contribution released in the 2023 annual report on JUs by the European Court of Auditors, which includes the full extent of contributions from JU members (both to projects and as additional activities) <sup>294</sup>.

<sup>294</sup> European Court of Auditors, Annual Report on EU Joint Undertakings for the financial year 2023 ([https://www.eca.europa.eu/ECAPublications/SAR-JUS-2023/SAR-JUS-2023\\_EN.pdf](https://www.eca.europa.eu/ECAPublications/SAR-JUS-2023/SAR-JUS-2023_EN.pdf)). The main difference in methodology is that the reports from the Court of Auditors do not distinguish between contributions to project activities and contributions for administrative costs, and do not include contributions from participants that are not member of the JU.

Several JUs in Horizon 2020 did not match EU contributions with co-investment in project activities only. Four JUs (fewer than in Horizon Europe) also reported additional activities, which constitute the majority of the funding they leverage from partners.

CORDA data and ECA data, even if taken at the same reference date, sometimes differ in ways that cannot be explained by differences in methodology. Compared with data published by ECA, CORDA shows:

- a higher amount for partners' contribution in ECSEL (predecessor of the current Chips JU), which cannot be explained by the role of Member States contribution (both sources include them as part of co-investment).
- lower EU contribution for EuroHPC, which significantly affects its leverage factor. While this is partly explained by EUR 100 million from the CEF programme not appearing in the CORDA-based analysis, there are more than EUR 100 million in EU contribution still not accounted for.

Table 48: Contribution and leverage of JUs in Horizon 2020

|             |                                       | Project co-investment<br>(source: CORDA)                |   | Leverage including additional activities<br>(source: European Court of Auditors, JU AARs) |   |  |
|-------------|---------------------------------------|---|---|---|---|--|
| JU name     | Horizon Europe contribution (a) (EUR) | Participants co-investment in EU R&I projects (c) (EUR) | Direct 'call' leverage factor (c) / (a) | JU members contributions to project activities (ECA 2023) (x)                             | Additional activities of JU members, costs incurred (y) (EUR) | Direct leverage factor including additional activities (x + y) / (a) |
| BBI-CBE     | 820 647 794                           | 391 606 355   | 0.48                                    | 172 700 000   | 2 150 572 377   | 2.83   |
| CS2-CAJU    | 1 646 763 050                         | 324 042 268   | 0.20                                    | 1 104 100 000   | 1 407 000 000   | 1.52   |
| ECSEL-Chips | 1 153 801 145                         | 3 480 250 749   | 3.02                                    | 2 676 100 000   | 0   | 2.32   |
| EuroHPC*    | 142 404 897                           | 138 767 919   | 0.97                                    | 199 900 000   | 0   | 1.40   |
| FCH-CLEANH2 | 638 885 191                           | 548 788 058   | 0.86                                    | 134 700 000   | 1 039 000 000   | 1.84   |
| IMI2-IHI    | 1 463 289 940                         | 1 547 184 225   | 1.06                                    | 1 298 300 000   | 0   | 0.89   |
| S2R-EURAIL  | 372 397 665                           | 63 891 076  | 0.17                                    | 373 100 000   | 266 794 243   | 1.72   |
| SESAR       | 545 246 497                           | 534 783 461   | 0.98                                    | 644 000 000   | 0   | 1.18   |

Source: CORDA (Horizon 2020 contribution and costs), Annual Activity Reports of JUs (for additional activities), European Court of Auditors 2023 report on JUs, table 2.1.

Note: figures on the right-hand side of the table cover only JU members. Figures on the left-hand side may include co-investment from any participant in JU projects.

\* For EuroHPC, no data on in eGrants funding from CEF (EUR 100 million according to ECA).annual progress report 2023 of EDCTP2.

For the Horizon 2020 implementation period, this evaluation also covers the EDCTP2 Article 185 initiative, whose successor is a JU. The concepts of co-investment and additional activities also apply to this partnership, although no data sources are available beyond the partnership's own progress reports. Figures for the Horizon 2020 period are presented in the table below.

| Partnership name  | Horizon Europe contribution (a) (EUR) | Participants co-investment in EU R&I projects (c) (EUR) | Additional activities of JU members, costs incurred (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|-------------------|---------------------------------------|---|---|---|--|
| EDCTP2 (Art. 185) | 604 334 900                           | 168 830 000   | 666 779 018   | 0.28  | 1.38   |

Source: annual progress report 2023 of EDCTP2.

## In-cash vs. in-kind contributions

In Horizon Europe, JUs are required to report periodically on committed and actually provided financial and in-kind contributions. Due to the complex legal obligations associated with the amount of contributions required from JU members, the definition of 'financial' and 'in-kind' take a specific meaning in this context.

'Financial contribution' (sometimes called 'cash' contribution<sup>295</sup>) encompasses:

- expenditure to cover the administrative costs of the partnership, from any partner (the EU, Member States or international organisation, and other partners);
- contributions to operational (project) activities from Member States and international organisations, where applicable;
- contributions from JU members other than the EU to project beneficiaries eligible to receive funding, if these are provided for.

This multiple usage can create confusion, as the phrase 'cash contributions' may describe both revenue contributing to the JUs' running costs and project-specific investments<sup>296</sup>.

For this analysis, it is important to make a distinction between these types of financial contributions. Financial contributions for project activities are an integral part of co-investment as defined here, while contributions to administrative costs are not included in the calculations.

In-kind contributions come specifically from members of the JU, and are of two types:

- **In-kind contributions to operational activities (IKOP).** These are defined in the legal basis ('Single Basic Act') for JUs as 'the eligible costs incurred by [members of the partnership<sup>297</sup>] in implementing indirect actions less the contribution of that joint undertaking and of the participating states of that joint undertaking to those costs'.<sup>298</sup>

<sup>295</sup> Some sources – especially, annual reports on EU Joint Undertakings by the European Court of Auditors – call these financial contributions "cash contributions". Under this definition, the highest cash contribution will always be in partnerships where project participants receive substantial financial support from EU Member States.

<sup>296</sup> See for instance ECA Report on Joint Undertakings (2022), p. 26. Link: [https://www.eca.europa.eu/ECAPublications/SAR-JUS-2022/RAS-Jus-FY2022\\_EN.pdf](https://www.eca.europa.eu/ECAPublications/SAR-JUS-2022/RAS-Jus-FY2022_EN.pdf)

<sup>297</sup> "private members, constituent entities or the affiliated entities of either, by international organisations and by contributing partners"

<sup>298</sup> In principle, the sum of IKOP and financial contributions to operational activities (including from Member States) is identical to the co-investment as measured elsewhere in this section. IKOP however also undergo a certification process whose outcome cannot be pre-empted. For most leverage measures, the report intentionally refers only to "co-investment" as captured in CORDA, rather than to IKOP.



- **In-kind contributions to additional activities (IKAA)**, which are the costs incurred by members of the partnership to implement additional activities as defined in Box 9, excluding any contribution from the EU and from participating states.

At the current stage of reporting, it is unclear for most JUs whether any financial contributions *to operational activities* beyond IKOP are provided for, or even monitored. From the latest Activity Reports, a distinction is apparent for only two partnerships.

- Innovative Health Initiative, which distinguishes between IKOP and financial contributions (defined as ‘contribution from IHI private members and contributing partners to IHI project beneficiaries eligible to receive funding’) for all grant agreements signed before 31 December 2023. Financial contributions account for approximately 12.4% of all project co-investment.<sup>299</sup>
- Global Health – EDCTP3, for which the legal basis does not provide for any IKOP obligations (Single Basic Act of JUs, Article 103(2)). Some project costs that are not covered by EU contributions are classified as ‘financial contribution’<sup>300</sup>.

Even though private members of JUs may always make cash contributions to project activities<sup>301</sup>, the Horizon Europe regulation states that financial contributions from partners and Member States ‘should be aimed primarily at covering administrative costs as well as coordination and support of other non-competitive activities’<sup>302</sup>. While this suggests that JU members other than the EU are not expected to provide *financial* contributions to R&I activities, Member States in tripartite JUs do in fact provide substantial contributions to R&I projects, even when selected competitively.

To sum up, for most JUs under Horizon Europe, the entire co-investment from private partners to date in signed grant agreements consists of in-kind contributions. This is also true for additional activities, which are by definition ‘in kind’ for JUs.

It is to be noted that, in the EU Financial Regulation, ‘in-kind contribution’ means ‘non-financial resources made available free of charge by third parties to a beneficiary’<sup>303</sup>. However, in the legal basis for JUs, IKOP are defined more broadly, as *any* eligible project cost not covered by the EU or by other partners. From this definition, it is unclear whether in-kind contributions in the form of IKOP show any meaningful difference with co-investment from beneficiaries in non-partnership R&I projects – which are normally not referred to as ‘in-kind’ contributions.

### Article 185 initiatives

Only one ‘Article 185’ initiative is covered by this interim evaluation, the European Partnership on Metrology (EPM) with its Horizon 2020 predecessor, the European Metrology Programme for Innovation and Research (EMPIR)<sup>304</sup>.

Data availability on the activities of this partnership is limited: its grants are not managed with Commission corporate tools, implementation data for Horizon Europe is not yet integrated in

<sup>299</sup> IHI JU Consolidated Annual Activity report, pp. 102-103

<sup>300</sup> GH-EDCTP3 annual report 2023, section 2.4, p. 53.

<sup>301</sup> JU SBA art. 11

<sup>302</sup> Annex III HE Regulation, point 1 “Selection”, last paragraph.

<sup>303</sup> EU financial regulation, article 2(38) (“Definitions”).

<sup>304</sup> The other Article 185 partnership funded under Horizon Europe, [PRIMA \(Partnership for Research and Innovation in the Mediterranean Area\)](#), has separate evaluation provisions and is not covered in this Staff Working Document.



CORDA, and no annual activity report is made public. The information found here has been communicated directly by the partnership secretariat. Unlike other partnerships, total costs can only be estimated based on the EU contribution provided rather than calculated precisely.

Figures suggest that, if the same estimation methodology is applied, the European Partnership on Metrology in Horizon Europe has higher leverage than its predecessor in Horizon 2020, EMPIR. This is due in particular, but not exclusively, to the inclusion of additional activities from Member States in EPM – whereas these were not reported in EMPIR.

Table 49: Contribution and leverage of Art. 185 initiatives

| Partnership name                                   | Horizon Europe contribution (a) (€) | Other EU contribution (b) (€) | Participants' contribution to EU R&I projects (c) (€) | Additional activities of partners, costs incurred (d) (€) | Direct 'call' leverage factor (c) / (a + b) (€) | Direct leverage factor including additional activities (c + d) / (a + b) (€) |
|--|-------------------------------------|-------------------------------|---|---|---|--|
| European Partnership on Metrology (Horizon Europe) | 67 698 053                          | 0                             | 88 305 000 (estimate)                                 | 67 102 272  | 1.30  | 2.30   |
| EMPIR (H2020)                                      | 299 629 630                         |                               | 261 847 645 (estimate)                                | NA  | 0.87  | NA   |

Source: Figures provided by EURAMET as of 31/12/2023.

Note: Co-funding estimated.

### EIT Knowledge and Innovation Communities

Implementation data on EIT Knowledge and Innovation Communities (EIT KICs) is not fully available in Commission monitoring systems. These capture the grants initiating the KIC and any Horizon Europe grant which the KICs – which are bodies with an independent legal personality – may have received in other FP calls. Due to long-standing data integration difficulties, they do not yet fully capture the activities arranged by the KICs. Nor do they capture revenues of the KIC and non-EU funded KIC activities, which are the equivalent of additional activities for other European partnerships.

A monitoring system for KIC activities arranged by EIT distinguishes between the following:

- EIT contribution to the KIC
- partners' co-funding (co-investment)
- The KICs' revenues,<sup>305</sup> which may include participation fees or a share of the profits from the products launched by partners
- Additional activities, called 'non-EU funded activities' (NEFA). These may include other sources of EU funding, such as grants received in other parts of Horizon Europe. The amount of EU resources supporting additional activities is not known to this evaluation.

This data makes it possible to get an approximation of the amounts leveraged by KICs beyond the EU grants supporting it. Nevertheless, an exact estimate of the funding leveraged in

<sup>305</sup> This metric and corresponding leverage factors is shown for EIT KICs only, and not used for comparisons with other types of partnerships.

Horizon Europe is still not possible, because data is disaggregated only by year, and not by source of funding.

For the Horizon Europe implementation period, there is a clear distinction between EIT Climate-KIC, EIT Digital and EIT InnoEnergy – the KICs that were launched in 2009, during the FP7 programming period – and the others. These ‘first-wave’ KICs all have leverage factors close to or above 1, indicating that resources from partners exceed the EU contribution. For the KICs launched under Horizon 2020, leverage factors are well below 1, indicating that most activities of these KICs are directly funded by the Horizon Europe budget. This is in line with the KIC funding model as defined in the EIT Strategic Innovation agenda<sup>306</sup>, based on a gradual decreasing of the EIT funding rate during the KIC’s life cycle and gradual increase of the level of private and public investment from partners (excluding revenues).

The three first-wave KICs have reached the 15-year term by which they are expected to become financially sustainable without the financial contribution of the EIT. Figures show that these KICs have increased their capacity to leverage resources through co-investment and additional activities beyond the EIT grant, which is part of the definition of financial sustainability used for KICs<sup>307</sup>. There has been a change compared to Horizon 2020: during the previous programming period, the leverage factor of these ‘older’ KICs was generally similar to that seen for the newer ones. This is also in line with the KIC funding model, where the highest amount of external funding for KICs is intended to materialise over the last 4 years (exit from EIT grant phase) of the KIC’s 15-year life cycle.

EIT KICs’ leverage effect in Horizon 2020 included the concept of ‘KIC Complementary Activities (KCA)’, i.e. non-EIT-funded additional activities of EIT KICs triggered by the EIT intervention. The concept was however abandoned in Horizon Europe, based on the recommendation in the ECA special report, No. 4 / 2016<sup>308</sup>; accordingly, it is not included in the leverage factors in Table 51. Owing to the change in methodology, the amount of additional activities declared as NEFA is significantly lower than the amounts accounted under KCAs in the previous programme. In line with the KIC model, the amounts of NEFAs are expected to increase towards the end of each KIC’s life cycle.

The EIT also reports the investment collected by companies supported by EIT KICs<sup>309</sup>, and includes as part of leverage in its own reporting. This source of *indirect* leverage is not included in our calculations for consistency with other partnerships. Figures are however presented later in this annex (“Are Horizon Europe participants collecting additional investments?” subsection) and in partnership specific annexes, as they are particularly important to capture the leverage potential of the KICs and their progress towards financial sustainability. For the most mature EIT KICs, the ratio between these additional investments and EU contribution ranges between 3:1 (EIT Climate-KIC) to 32:1 (EIT InnoEnergy).

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<sup>306</sup> Decision (EU) 2021/820 of the European Parliament and of the Council of 20 May 2021 on the Strategic Innovation Agenda of the European Institute of Innovation and Technology (EIT) 2021-2027; chapter 3.6.2. “KIC funding model”.

<sup>307</sup> Decision 13/2021 of the Governing Board of the European Institute of Innovation and Technology: [https://eit.europa.eu/sites/default/files/2021-13\\_20210317-gb66-13\\_new\\_eit\\_fs\\_principles.pdf](https://eit.europa.eu/sites/default/files/2021-13_20210317-gb66-13_new_eit_fs_principles.pdf)

<sup>308</sup> European Court of Auditors, Special report no 04/2016: The European Institute of Innovation and Technology must modify its delivery mechanisms and elements of its design to achieve the expected impact. Luxembourg: Publications Office of the European Union, 2016.

Link: [https://www.eca.europa.eu/Lists/ECADocuments/SR16\\_04/SR\\_EIT\\_EN.pdf](https://www.eca.europa.eu/Lists/ECADocuments/SR16_04/SR_EIT_EN.pdf)

<sup>309</sup> This indicator captures a similar measure as one of the indicators under Key Impact Pathway #9 medium-term (“Scaling-up - Amount of public & private investment mobilised to exploit or scale-up results from the Programme”)

Table 51: Contribution and leverage of EIT KICs, Horizon Europe period

| Partnership name   | Horizon Europe contribution (a) (EUR) | Participants' contribution to EU R&I projects (c) (EUR) | Additional activities of partners, costs incurred (NEFA) (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) | KIC revenues (e) (EUR) | Direct leverage factor including additional activities and revenues (c + d + e) / (a + b) (EUR) |
|--------------------|---------------------------------------|---|--|---|--|------------------------|---|
| EIT-Climate        | 65 980 000                            | 47 820 000  | 15 450 000   | 0.72  | 0.96   | 30 780 518             | 1.43  |
| EIT-Digital        | 79 574 358                            | 49 144 817  | 335 650 000  | 0.62  | 4.84   | 24 996 942             | 5.15  |
| EIT InnoEnergy     | 111 351 484                           | 172 392 066   | 107 530 000  | 1.55  | 2.51   | 108 881 000            | 3.49  |
| EIT Food           | 174 870 085                           | 39 016 977  | 2 010 000  | 0.22  | 0.23   | 18 614 854             | 0.34  |
| EIT Health         | 168 614 546                           | 49 987 028  | 14 020 000   | 0.30  | 0.38   | 27 122 643             | 0.54  |
| EIT Manufacturing  | 116 940 356                           | 42 029 568  | 14 200 000   | 0.36  | 0.48   | 18 421 215             | 0.64  |
| EIT RawMaterials   | 169 078 233                           | 91 995 523  | 1 510 000  | 0.54  | 0.55   | 29 906 809             | 0.73  |
| EIT Urban Mobility | 127 686 161                           | 20 076 344  | 20 010 000   | 0.16  | 0.31   | 12 693 752             | 0.41  |

Source: Figures provided by EIT as of 31/12/2023. 'Other EU contribution' omitted as not known. KIC revenues not included in the calculation for consistency with other partnerships.

Table 52: Contribution and leverage of EIT Knowledge and Innovation Communities, Horizon 2020 period

| Partnership name  | Horizon Europe contribution (a) (EUR) | Participants' contribution to EU R&I projects (c) (EUR) | Additional activities of partners (KCA) (d) (EUR) | KIC revenues (e) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including revenues (c + e) / (a + b) (EUR) |
|-------------------|---------------------------------------|---|---|------------------------|---|---|
| EIT-Climate       | 554 145 243                           | 98 674 162  | 1 657 120 000                                     | 17 197 636             | 0.18  | 0.21  |
| EIT-Digital       | 464 239 920                           | 130 542 884   | 1 380 120 000                                     | 18 227 714             | 0.28  | 0.32  |
| EIT-InnoEnergy    | 526 143 929                           | 86 098 276  | 1 511 040 000                                     | 62 851 641             | 0.16  | 0.28  |
| EIT-Food          | 129 670 630                           | 31 832 416  | 284 410 000                                       | 14 271 010             | 0.25  | 0.36  |
| EIT-Health        | 283 219 403                           | 69 004 172  | 797 440 000                                       | 36 623 641             | 0.24  | 0.37  |
| EIT-Manufacturing | 32 658 504                            | 5 719 037   | 68 870 000  | 4 639 228              | 0.18  | 0.32  |
| EIT-RawMaterials  | 273 328 932                           | 64 673 354  | 783 760 000                                       | 41 656 653             | 0.24  | 0.39  |
| EIT-UrbanMobility | 31 322 415                            | 5 761 949   | 48 120 000  | 2 783 022              | 0.18  | 0.27  |

Source: Figures provided by EIT as of 31 December 2023. 'Other EU contribution' (column (b) in other tables) omitted as not known. KIC revenues not included in the calculation of leverage factors for consistency with other partnerships.

## **Non-institutionalised partnerships**

### **Co-programmed partnerships**

Research activities under co-programmed partnerships are defined within a Strategic Research and Innovation Agenda (SRIA), co-designed with partners, and implemented through standard

Pillar II calls. Each partnership operates according to the requirements set by a specific memorandum of understanding (MoU). Funding rates are not significantly different from those in the rest of Pillar II and, accordingly, co-investment ratios are lower than for other types of European partnerships (Table 53). The only exception is the Clean Steel partnership, which has a high call leverage factor of EUR 0.68 per euro invested by the EU.

The added value of these partnerships in terms of leverage is supposed to come primarily from *in-kind* additional activities. Similarly to the JUs<sup>310</sup>, these are defined as additional activities that are within the scope of the SRIA and the objectives of the partnerships but are not covered by EU funding. Co-programmed partnerships are required to monitor and regularly report on agreed and provided contributions alongside with additional activities from private members<sup>311</sup><sup>312</sup>. Contrary to JUs, however, these activities are not subject to any formal certification process.

To date, information on additional activities under the scope of the partnership is reported primarily by its members to the Commission through confidential IT channels, on a periodic basis (every year or every two years, according to the MoU). While the exact scope of the activities remains confidential, all MoUs of co-programmed partnerships provide that the outcome of periodic reporting from partners should feed into the Horizon Europe evaluation process<sup>313</sup>.

Compared to the EU contribution they receive, the value of additional activities reported by partners is very high: even with some data gaps (see Table 53), the total investments declared amount to over EUR 10 billion for all partnerships combined. However, due to the way this data is reported and constraints relating to confidentiality and competitiveness, very little is known about the actual extent of these activities – for instance, on whether the same activities are declared by multiple partners, or whether EU funding from other sources is used.

Table 53: Contribution and leverage of Co-programmed partnerships

| Partnership name      | Horizon Europe contribution (a) (EUR) | Other EU contribution (b) (EUR) | Participants' contribution to EU R&I projects (c) (EUR) | Additional activities of partners, incurred costs (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|-----------------------|---------------------------------------|---------------------------------|---|---|---|--|
| 2ZERO                 | 305 398 972                           | 0                               | 60 476 390  | 673 506 087   | 0.20  | 2.40   |
| AI, Data and Robotics | 606 528 909                           | 0                               | 54 004 190  | 144 581 063 **  | 0.09  | 0.33 **  |
| Built4People          | 175 969 111                           | 0                               | 34 480 935  | not disclosed   | 0.20  | not disclosed  |
| CCAM                  | 208 302 018                           | 0                               | 36 592 313  | 519 897 048   | 0.18  | 2.67   |
| Clean Steel           | 64 294 037                            | 24 710 696 *                    | 60 861 599  | 162 995 000   | 0.68  | 2.52   |
| EOSC                  | 162 604 303                           | 0                               | 2 234 950   | 614 007 650   | 0.01  | 3.79   |
| Batt4EU               | 308 590 260                           | 0                               | 14 192 116  | 1 141 660 899   | 0.05  | 3.75   |

<sup>310</sup> One of the differences between additional activities in co-programmed partnerships and in Joint Undertakings is the absence of any certification mechanisms on these additional activities.

<sup>311</sup> Co-programmed Partnership MoU, Section 6, "Monitoring"

<sup>312</sup> In-kind additional activities are addressed in the Annual Activities Plan (AAP) of each Partnership and (as for JUs) should be planned and reported via a dedicated IT tool, in such a way as to ensure future integration in the EC corporate systems. Additional activities require close monitoring, since if contributions from non-EU partners fall significantly below the agreed estimations in the AAP, EC contributions must be adjusted. Co-programmed Partnership MoU, Section 5.5. "Fulfilment of Commitments"

<sup>313</sup> Section 6 of MoUs of all co-programmed partnerships.

| Partnership name | Horizon Europe contribution (a) (EUR) | Other EU contribution (b) (EUR) | Participants' contribution to EU R&I projects (c) (EUR) | Additional activities of partners, incurred costs (d) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) | Direct leverage factor including additional activities (c + d) / (a + b) (EUR) |
|------------------|---------------------------------------|---------------------------------|---|---|---|--|
| Made in Europe   | 462 613 569                           | 0                               | 58 235 406  | 2 734 830 000 **  | 0.13  | 6.04 **  |
| Photonics        | 259 183 714                           | 0                               | 21 878 617  | 1 257 792 356   | 0.08  | 4.94   |
| Processes4Planet | 506 463 819                           | 0                               | 102 653 959   | 1 218 131 688   | 0.20  | 2.61   |
| ZEWT             | 239 757 594                           | 0                               | 58 200 225  | 1 645 912 276   | 0.24  | 7.11   |

*Source:* CORDA and eGrants dashboard, grant agreements signed at 31 December 2023, and additional activity reports of co-programmed partnerships (2021-2022, 2023). Only incurred expenditures are taken into account.

\* Funding from the Research Fund for Coal and Steel (RFCS)

\*\* Additional activity reports available for 2021 and 2022 only.

## Co-funded partnerships

Co-funded partnerships are implemented through a grant agreement, established following a call for proposals<sup>314</sup>. Typically, the co-funding rate is either 30% or 50% of the total project cost, leading to a substantial level of co-investment from partners. These are in most cases public organisations, namely funding bodies at national or regional level.

**All data presented in the analysis is related to the grant agreement and therefore *ex-ante*.** There is no guarantee that the partnerships' partners will actualise their political commitments and estimated contributions. This uncertainty makes it difficult to accurately assess whether the estimated leverage set out above will materialise as planned.

All grants initiating co-funded partnerships have leverage factors above 1: partners are expected to bring in at least as many resources as the EU. Agroecology, and Assessment of risks from chemicals (PARC), exhibit the lowest leverage factor of 1.00, indicating that for every euro contributed by Horizon Europe, consortia members also contribute EUR 1 to the partnerships' total costs. Several other partnerships have a leverage ratio of 2.33, which is equivalent to a 30%-70% split in resources between the EU and partners. Sustainable Blue Economy and Driving Urban Transitions reported much higher leverage factors, at 3.86 and 3.79 respectively.

It is to be noted that co-funded partnerships may receive the EU contribution throughout multiple work programmes, via 'top-up calls' that result in amendments to grant agreements. These amendments increase the EU contribution, typically within the constraints of the resources available in the work programme they are funded under. Leverage factors may therefore vary in the future as the resources committed with the first grant are 'topped-up' in following years. This is especially likely for partnerships with leverage factors above 2.33. Due to their implementation through different phases, partners may have included activities and anticipated costs on their initial proposals that will only be 'matched' by an increased EU contribution in future work programmes.

However, the high leverage factor for co-funded partnerships does not show the source of the funds committed by national authorities. In the context of the 2024 Biennial Monitoring Report on partnerships, at least four Member States reported having financially supported their participation in co-funded partnerships through the use of ESIF and ERDF funds<sup>315</sup>, as well as the Recovery and Resilience Fund<sup>316</sup>. While these examples are ideal cases of synergies between different types of EU funds, they do not technically represent additional spending in R&I compared to the EU budget. Despite these reporting exercises, no granular monitoring on the amounts committed by Member States from other EU funds is available for this evaluation.

Another major limitation to the analysis of leverage for co-funded partnerships is that the amounts shown in Table 54 only account for the grants signed between the consortia and the EU. Most co-funded partnerships<sup>317</sup> arrange their own funding schemes for third-party beneficiaries, a form of 'cascade granting'<sup>318</sup>. They may also arrange non-EU funded activities, such as funding schemes aimed at beneficiaries beyond EU Member States and Horizon Europe associated countries.

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<sup>314</sup> Horizon Europe Work Programme 2023-2025, General Annexes

<sup>315</sup> BMR 2024, p. 77.

<sup>316</sup> BMR 2024, p. 196. The case of Italy is specifically mentioned.

<sup>317</sup> The exception is PARC, where partners are the only beneficiaries of EU funding.

<sup>318</sup> Cascading schemes might include various financial mechanisms, such as grants, prizes, procurement, and Horizon Europe blended finance.



Each partnership implements its own work programme, disbursing funds to end-point beneficiaries. Rules of participation may vary, and there may be additional co-funding from beneficiaries (or non-EU funded participation, such as from third country entities that are supported by other parties), as well as other additional non-EU-funded activities.

This layered financing structure could allow for a more comprehensive assessment of leverage, since it would make it possible to estimate additional contributions and activities, beyond the EU contribution to the specific partnership grant agreement. However, the impact of cascade granting, specifically the additional contributions of beneficiaries and end-point beneficiaries, cannot be quantified as reporting data on the cascading component are not currently available in Commission monitoring systems in a manner that allows for appropriate aggregation. Moreover, beside contributions to R&I projects (in-kind and other), there are also membership contributions in some cases. Details on such contributions are not reported.

In essence, as of today, it is not possible through Commission monitoring systems to capture and consolidate all the data necessary to quantify additional contributions to co-funded partnerships from members and end-point beneficiaries.

Table 54: Contribution and leverage of co-funded partnerships

| Partnership name                          | Horizon Europe contribution (a) (EUR) | Partners contribution to EU R&I projects (c) (EUR) | Direct 'call' leverage factor (c) / (a + b) (EUR) |
|---|---------------------------------------|--|---|
| Agroecology                               | 60 000 000                            | 60 000 000   | 1.00  |
| Assessment of risks from chemicals (PARC) | 200 000 000                           | 200 000 000  | 1.00  |
| Biodiversa+                               | 40 000 000                            | 96 144 162   | 2.40  |
| Clean Energy Transition                   | 70 000 000                            | 208 350 377  | 2.98  |
| Driving Urban Transitions                 | 37 000 000                            | 140 266 254  | 3.79  |
| ERA4Health                                | 33 045 067                            | 77 105 156   | 2.33  |
| Innovative SMEs                           | 69 644 027                            | 162 502 734  | 2.33  |
| Personalised Medicine                     | 100 575 465                           | 234 676 086  | 2.33  |
| Sustainable Blue Economy                  | 23 000 000                            | 88 827 683   | 3.86  |
| Transforming health and care systems      | 91 574 573                            | 213 674 014  | 2.33  |
| Water4All                                 | 26 019 783                            | 60 712 827   | 2.33  |

Source: CORDA, 31 December 2023.

Note: All figures are *ex-ante*. Implementation figures on cascade grants and additional activities not yet available.

Top-up EU grants supplementing the resources of the partnership are not included, as none was signed at 31/12/2023.

### Are Horizon Europe participants collecting additional investments?

The concept of leverage may also be used to encompass funding received by beneficiaries after project participation (a form of 'indirect' leverage). For example, the Horizon 2020 ex post evaluation reports that SMEs participating in the LEIT parts of the programme (largely equivalent to Cluster 4 in Horizon Europe) collected at least EUR 9.4 billion in investment after project signature.<sup>319</sup>

Information on additional investment collected by participants is available only in a fragmented way, also in Horizon Europe. Suitable data is currently not available to this evaluation for most

<sup>319</sup> Horizon 2020 ex post evaluation Staff Working Document, p. 83.

programme parts: the first programme-wide data – as captured under the Key Impact Pathway 9 medium-term indicator<sup>320</sup> – will become available from 2025 onwards.

The only programme part for which structured figures about additional investments are already available is the EIT. The EIT collects data on investment collected by *start-ups* participating in KICs on an annual basis: these constitute a prominent component of the EIT’s own leverage framework.

The data shared by EIT indicates that the value of these investments is considerably larger than the amount of the EIT grant in most KICs. While the values cannot be aggregated across KICs to give a single leverage factor for all EIT KICs – as the same company may be involved in multiple KICs – there are visible differences between them, with some KIC participants attracting much more investments than others. In the InnoEnergy KIC, the amount of investment collected by supported startups is over 30 times higher than the EIT grant, which leads to a very high implied leverage factor. Most of the amount invested is reported for 2023. This KIC has the peculiarity of acting itself as a venture capital fund, managing a portfolio of over 200 investments in the energy and transportation sectors<sup>321</sup>.

Table 55: Additional investments collected by start-ups participating in EIT KICs, 2021-2023

| Partnership name   | EIT contribution (EUR) (a) | Additional investments to start-ups (EUR) (b) | Ratio between additional investments and EIT grant (b / a) |
|--------------------|----------------------------|---|--|
| EIT-Climate        | 65 980 000                 | 179 420 000                                   | 2.7  |
| EIT-Digital        | 79 574 358                 | 340 620 000                                   | 4.3  |
| EIT-InnoEnergy     | 111 351 484                | 3 593 970 000                                 | 32.3   |
| EIT-Food           | 174 870 085                | 840 060 000                                   | 4.8  |
| EIT-Health         | 168 614 546                | 1 175 440 000                                 | 7.0  |
| EIT-Manufacturing  | 116 940 356                | 113 930 000                                   | 1.0  |
| EIT-RawMaterials   | 169 078 233                | 395 120 000                                   | 2.3  |
| EIT-Urban Mobility | 127 686 161                | 92 230 000                                    | 0.7  |

*Source:* Figures provided by EIT as of 31 December 2023. Figures for additional investments are rounded to the closest 10 000. EIT contribution refers specifically to the grant the KICs received from the EIT between 2021 and 2023 – other sources of funding from the EU are not included as not structurally collected in EIT reporting.

<sup>320</sup> ‘Scaling-up - Amount of public & private investment mobilised to exploit or scale-up results from the Programme (including foreign direct investments)’

<sup>321</sup> See European Partnership Annex on EIT InnoEnergy, p. 8.

## Annex 8 Additional data on state-of-play, including for the European Partnerships and EU Missions

Five EU Missions aim to provide concrete solutions to some among the greatest challenges and to directly support EU priorities.

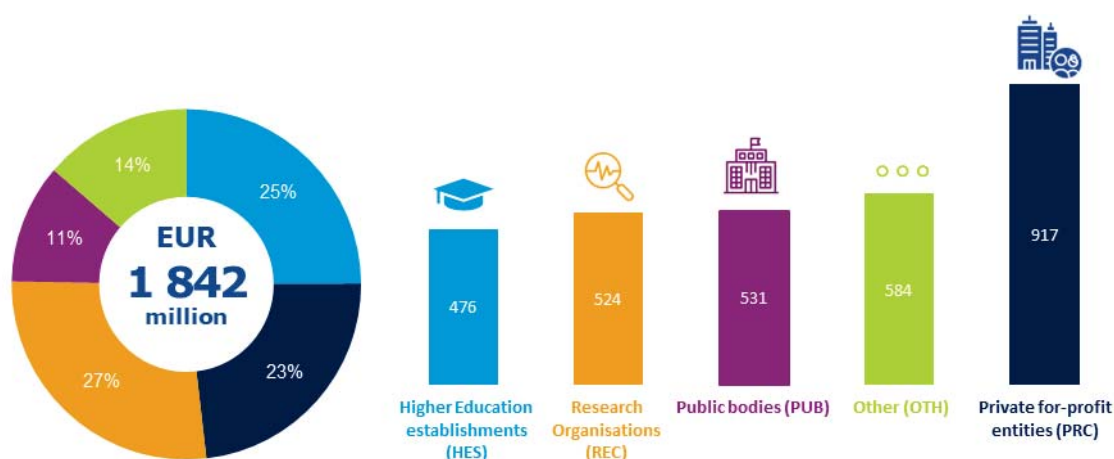
Horizon Europe work programmes allocate up to EUR 2.55 billion exclusively for Mission-specific calls for the first four years of the programme (2021-2024). By the end of December 2024, **236** grants had been signed for a total of **EUR 1.84 billion**<sup>322</sup>.

The **average grant size** for Missions is **EUR 7.8 million**, higher than for Horizon Europe (EUR 2.88 million) but closer to the average of Pillar II (EUR 6.4 million).

Of the **3 302 beneficiaries**, 87% are from Member States, 34% of which from Widening countries. **902** participants in Missions projects are SMEs, collectively receiving **EUR 303 million**.

Missions have been designed to facilitate participation from a diverse array of beneficiaries. Research organisations lead in the funding received (27%, EUR 499.4M), followed by higher education (25%, EUR 459.3M) and private for-profit entities (23%, EUR 428.1M). Private for-profit entities have the most distinct participants (917) and highest participation rate (30%), followed by “Other” entities, which are often civil society organisations (584 beneficiaries, 19%).

Figure 126: Horizon Europe Mission beneficiaries by type of organisation



As of January 2025, 50 European partnerships were identified (three are still under preparation), and another ten are announced in the Strategic Plan for 2025-2027. The JUs have awarded **530 grants** as of 6 January 2025, which include **4 281 participants** (engaged in 9 186

<sup>322</sup> There are two types of mission calls in Horizon Europe: calls that are 100% dedicated to one specific mission and horizontal calls that benefit to all 5 missions or joint calls that benefit to two or three missions. Funding for these calls is split between missions according to a weighting defined by the EC, while Participants and Participations are counted for each mission separately.

participations). The total EU funding allocated to this has been **EUR 4.8 billion** (towards total project costs of EUR 7 billion).

Table 56: Key figures for Joint Undertakings

| JU name                                    | Grants     | Participants | Participation | EU funding (EUR)     | Total Cost (EUR)     |
|--|------------|--------------|---------------|----------------------|----------------------|
| Circular Bio-based Europe JU               | 52         | 588          | 788           | 330,864,460          | 430,584,418          |
| Clean Aviation JU                          | 28         | 282          | 627           | 805,855,802          | 1,066,919,085        |
| Clean Hydrogen JU                          | 102        | 840          | 1,294         | 642,578,756          | 1,533,550,982        |
| EuroHPC JU                                 | 17         | 119          | 209           | 82,291,527           | 171,866,473          |
| Europe's Rail JU                           | 23         | 363          | 747           | 278,279,609          | 366,579,075          |
| Global Health EDCTP3 JU                    | 74         | 305          | 563           | 233,973,983          | 253,828,364          |
| Innovative Health Initiative JU            | 30         | 633          | 967           | 352,319,886          | 677,241,398          |
| Key Digital Technologies JU (now Chips JU) | 58         | 1,120        | 1,979         | 1,345,275,223        | 3,221,782,121        |
| Single European Sky ATM Research 3 JU      | 68         | 292          | 809           | 228,694,245          | 399,221,417          |
| Smart Networks and Services JU             | 78         | 494          | 1,203         | 495,989,812          | 537,171,119          |
| <b>Total</b>                               | <b>530</b> | <b>4,281</b> | <b>9,186</b>  | <b>4,796,123,303</b> | <b>8,658,744,451</b> |

Source: CORDA, data as of 6 January 2025. Only Horizon Europe funding included.

More information on the funding provided by EU programmes other than Horizon Europe to the JUs is available in the section on external coherence and synergies below.

The EU contribution to SMEs in institutionalised partnerships is:

- For the JUs: 14.5%, while the share of unique participants that are SMEs is 32.5%.
- For the EIT KICs: 21.9% of total EIT funding.<sup>323</sup> 726 SMEs participated in the activities of EIT KICs out of 1971 active partners, constituting 36.8% of SME participation.<sup>324</sup>

The **11 co-programmed partnerships**<sup>325</sup> have had 589 grants as of 6 January 2025, awarding EUR 4.0 billion of EU funding to 4 753 participants (with 9 650 participations), towards a total project cost of EUR 4.6 billion.

The **14 co-funded partnerships** have had 14 grants (one per partnership), awarding EUR 1.17 billion of EU funding to 673 participants (with 1 228 participations), towards a total grants budget of EUR 3.7 billion.

<sup>323</sup> The EIT KICs have been awarded EUR 1 740 million of EIT funding in 2021-2024. The EIT contribution to SMEs in EIT KICs over the same period was EUR 381 million.

<sup>324</sup> Participations of active partners under the EIT KICs Grant Agreements 2023-2025 as of January 2025.

<sup>325</sup> See lists of partnerships in the SWD glossary.

## Country Tables

### Applications

Table 57: Horizon Europe applications by country

| EU-27 Member State | Country code | Country group | Horizon Europe applications in eligible proposals over 2021-2024 | % of total | Horizon Europe applications in eligible proposals per year | Horizon Europe applications in high quality proposals | % of high quality applications | Retained Applications | Success rate of application in Horizon Europe | '000 of scientists and engineers per country * | Share of scientists and engineers in EU-27 | Applications per '000 of scientists and engineers in the population |
|--------------------|--------------|---------------|--|------------|--|---|--------------------------------|-----------------------|---|--|--|---|
| Austria            | AT           | Non widening  | 13,139   | 2.8%       | 3,285  | 9,034   | 68.8%                          | 2,733                 | 20.8%   | 459.4  | 2.5%                                       | 29  |
| Belgium            | BE           | Non widening  | 21,707   | 4.7%       | 5,427  | 15,514  | 71.5%                          | 5,241                 | 24.1%   | 548.8  | 2.9%                                       | 40  |
| Bulgaria           | BG           | Widening      | 3,148  | 0.7%       | 787  | 1,854   | 58.9%                          | 577                   | 18.3%   | 232.3  | 1.2%                                       | 14  |
| Croatia            | HR           | Widening      | 2,882  | 0.6%       | 721  | 1,767   | 61.3%                          | 487                   | 16.9%   | 120  | 0.6%                                       | 24  |
| Cyprus             | CY           | Widening      | 5,261  | 1.1%       | 1,315  | 3,334   | 63.4%                          | 841                   | 16.0%   | 49.5   | 0.3%                                       | 106   |
| Czechia            | CZ           | Widening      | 6,264  | 1.3%       | 1,566  | 3,986   | 63.6%                          | 1,230                 | 19.6%   | 424.7  | 2.3%                                       | 15  |
| Denmark            | DK           | Non widening  | 10,373   | 2.2%       | 2,593  | 7,385   | 71.2%                          | 2,272                 | 21.9%   | 345.8  | 1.8%                                       | 30  |
| Estonia            | EE           | Widening      | 3,300  | 0.7%       | 825  | 2,133   | 64.6%                          | 626                   | 19.0%   | 71.5   | 0.4%                                       | 46  |
| Finland            | FI           | Non widening  | 10,632   | 2.3%       | 2,658  | 7,242   | 68.1%                          | 2,292                 | 21.6%   | 318.3  | 1.7%                                       | 33  |

| <b>EU-27 Member State</b> | <b>Country code</b> | <b>Country group</b> | <b>Horizon Europe applications in eligible proposals over 2021-2024</b> | <b>% of total</b> | <b>Horizon Europe applications in eligible proposals per year</b> | <b>Horizon Europe applications in high quality proposals</b> | <b>% of high quality applications</b> | <b>Retained Applications</b> | <b>Success rate of application in Horizon Europe</b> | <b>'000 of scientists and engineers per country *</b> | <b>Share of scientists and engineers in EU-27</b> | <b>Applications per '000 of scientists and engineers in the population</b> |
|---------------------------|---------------------|----------------------|---|-------------------|---|--|---------------------------------------|------------------------------|--|---|---|--|
| France                    | FR                  | Non widening         | 35,620  | 7.6%              | 8,905   | 25,502   | 71.6%                                 | 8,210                        | 23.0%  | 2876.9  | 15.4%   | 12   |
| Germany                   | DE                  | Non widening         | 47,656  | 10.2%             | 11,914  | 33,308   | 69.9%                                 | 10,431                       | 21.9%  | 3958  | 21.1%   | 12   |
| Greece                    | EL                  | Widening             | 23,970  | 5.1%              | 5,993   | 15,972   | 66.6%                                 | 4,282                        | 17.9%  | 372.9   | 2.0%  | 64   |
| Hungary                   | HU                  | Widening             | 3,966   | 0.9%              | 992   | 2,500  | 63.0%                                 | 753                          | 19.0%  | 340.5   | 1.8%  | 12   |
| Ireland                   | IE                  | Non widening         | 8,790   | 1.9%              | 2,198   | 5,980  | 68.0%                                 | 1,741                        | 19.8%  | 343.4   | 1.8%  | 26   |
| Italy                     | IT                  | Non widening         | 48,391  | 10.4%             | 12,098  | 31,425   | 64.9%                                 | 8,788                        | 18.2%  | 1224  | 6.5%  | 40   |
| Latvia                    | LV                  | Widening             | 1,920   | 0.4%              | 480   | 1,149  | 59.8%                                 | 356                          | 18.5%  | 73.6  | 0.4%  | 26   |
| Lithuania                 | LT                  | Widening             | 2,659   | 0.6%              | 665   | 1,574  | 59.2%                                 | 497                          | 18.7%  | 149.5   | 0.8%  | 18   |
| Luxembourg                | LU                  | Non widening         | 2,291   | 0.5%              | 573   | 1,584  | 69.1%                                 | 436                          | 19.0%  | 39.9  | 0.2%  | 57   |
| Malta                     | MT                  | Widening             | 1,026   | 0.2%              | 257   | 625  | 60.9%                                 | 194                          | 18.9%  | 26.5  | 0.1%  | 39   |
| Netherlands               | NL                  | Non widening         | 24,916  | 5.4%              | 6,229   | 17,546   | 70.4%                                 | 5,753                        | 23.1%  | 1228.7  | 6.6%  | 20   |
| Poland                    | PL                  | Widening             | 9,329   | 2.0%              | 2,332   | 5,648  | 60.5%                                 | 1,691                        | 18.1%  | 1630.1  | 8.7%  | 6  |



| EU-27 Member State | Country code | Country group               | Horizon Europe applications in eligible proposals over 2021-2024 | % of total   | Horizon Europe applications in eligible proposals per year | Horizon Europe applications in high quality proposals | % of high quality applications | Retained Applications | Success rate of application in Horizon Europe | '000 of scientists and engineers per country * | Share of scientists and engineers in EU-27 | Applications per '000 of scientists and engineers in the population |
|--------------------|--------------|-----------------------------|--|--------------|--|---|--------------------------------|-----------------------|---|--|--|---|
| Portugal           | PT           | Widening                    | 15,329   | 3.3%         | 3,832  | 9,752   | 63.6%                          | 2,627                 | 17.1%   | 519.8  | 2.8%                                       | 29  |
| Romania            | RO           | Widening                    | 6,248  | 1.3%         | 1,562  | 3,506   | 56.1%                          | 1,039                 | 16.6%   | 582  | 3.1%                                       | 11  |
| Slovakia           | SK           | Widening                    | 2,102  | 0.5%         | 526  | 1,251   | 59.5%                          | 415                   | 19.7%   | 160.3  | 0.9%                                       | 13  |
| Slovenia           | SI           | Widening                    | 4,899  | 1.1%         | 1,225  | 3,250   | 66.3%                          | 1,004                 | 20.5%   | 96.4   | 0.5%                                       | 51  |
| Spain              | ES           | Non widening                | 52,030   | 11.2%        | 13,008   | 35,751  | 68.7%                          | 10,299                | 19.8%   | 1762.9   | 9.4%                                       | 30  |
| Sweden             | SE           | Non widening                | 12,968   | 2.8%         | 3,242  | 8,692   | 67.0%                          | 2,521                 | 19.4%   | 767.3  | 4.1%                                       | 17  |
|                    |              |                             |  |              |  |   |                                |                       |   |  |  |   |
|                    |              | <b>Total EU-27</b>          | <b>380,816</b>   | <b>81.8%</b> | <b>95,204</b>  | <b>257,264</b>  | <b>67.6%</b>                   | <b>77,336</b>         | <b>20.3%</b>                                  | <b>18723</b>                                   | <b>100%</b>                                | <b>20</b>   |
|                    |              | <i>Widening</i>             | <i>92,303</i>  | <i>19.8%</i> | <i>23,076</i>  | <i>58,301</i>   | <i>63.2%</i>                   | <i>16,619</i>         | <i>18.0%</i>                                  | <i>4,850</i>                                   | <i>25.9%</i>                               | <i>19</i>   |
|                    |              | <i>Non-Widening</i>         | <i>288,513</i>   | <i>62.0%</i> | <i>72,128</i>  | <i>198,963</i>  | <i>69.0%</i>                   | <i>60,717</i>         | <i>21.0%</i>                                  | <i>13,873</i>                                  | <i>74.1%</i>                               | <i>21</i>   |
|                    |              | <b>Associated countries</b> | <b>58,817</b>  | <b>12.6%</b> | <b>14,356</b>  | <b>37,656</b>   | <b>64.0%</b>                   | <b>10,759</b>         | <b>18.3%</b>                                  |  |  |   |

| <b>EU-27 Member State</b> | <b>Country code</b> | <b>Country group</b>        | <b>Horizon Europe applications in eligible proposals over 2021-2024</b> | <b>% of total</b> | <b>Horizon Europe applications in eligible proposals per year</b> | <b>Horizon Europe applications in high quality proposals</b> | <b>% of high quality applications</b> | <b>Retained Applications</b> | <b>Success rate of application in Horizon Europe</b> | <b>'000 of scientists and engineers per country *</b> | <b>Share of scientists and engineers in EU-27</b> | <b>Applications per '000 of scientists and engineers in the population</b> |
|---------------------------|---------------------|-----------------------------|---|-------------------|---|--|---------------------------------------|------------------------------|--|---|---|--|
|                           |                     | <b>Third countries</b>      | <b>25,990</b>   | <b>5.6%</b>       | <b>6,434</b>  | <b>18,292</b>  | <b>70.4%</b>                          | <b>5,598</b>                 | <b>21.5%</b>   |   |   |  |
|                           |                     | <b>Total Horizon Europe</b> | <b>465,623</b>  | <b>100.0 %</b>    | <b>115,993</b>  | <b>313,212</b>   | <b>67.3%</b>                          | <b>93,693</b>                | <b>20.12%</b>  |   |   |  |

\* Source: Eurostat, Employed HRST by category, age and occupation [hrst\_st\_nocc] 2023.  
Available for EU Member States only.

Table 58: Horizon Europe number of applications by type of organization

| EU-27 Member State | Country code | Country group | Horizon Europe applications in eligible proposals over 2021-2024 | HES                    | PRC    | PUB   | REC    | OTH   |
|--------------------|--------------|---------------|--|------------------------|--------|-------|--------|-------|
|                    |              |               |  | Number of applications |        |       |        |       |
| Austria            | AT           | Non widening  | 13,139   | 4,824                  | 4,000  | 258   | 3,295  | 762   |
| Belgium            | BE           | Non widening  | 21,707   | 6,772                  | 5,482  | 560   | 3,564  | 5,329 |
| Bulgaria           | BG           | Widening      | 3,148  | 592                    | 1,270  | 263   | 520    | 503   |
| Croatia            | HR           | Widening      | 2,882  | 1,035                  | 782    | 364   | 469    | 232   |
| Cyprus             | CY           | Widening      | 5,261  | 1,277                  | 2,881  | 320   | 442    | 341   |
| Czechia            | CZ           | Widening      | 6,264  | 2,928                  | 1,469  | 328   | 1,117  | 422   |
| Denmark            | DK           | Non widening  | 10,373   | 5,972                  | 2,500  | 751   | 655    | 495   |
| Estonia            | EE           | Widening      | 3,300  | 1,338                  | 1,069  | 263   | 176    | 454   |
| Finland            | FI           | Non widening  | 10,632   | 5,114                  | 2,555  | 487   | 1,938  | 538   |
| France             | FR           | Non widening  | 35,620   | 9,031                  | 12,227 | 1,147 | 10,898 | 2,317 |
| Germany            | DE           | Non widening  | 47,656   | 17,696                 | 14,636 | 1,038 | 12,164 | 2,122 |
| Greece             | EL           | Widening      | 23,970   | 6,514                  | 8,855  | 1,288 | 5,821  | 1,492 |
| Hungary            | HU           | Widening      | 3,966  | 1,218                  | 1,260  | 280   | 706    | 502   |
| Ireland            | IE           | Non widening  | 8,790  | 4,483                  | 3,164  | 286   | 319    | 538   |

| EU-27 Member State | Country code | Country group      | Horizon Europe applications in eligible proposals over 2021-2024 | HES            | PRC            | PUB           | REC           | OTH           |
|--------------------|--------------|--------------------|--|----------------|----------------|---------------|---------------|---------------|
| Italy              | IT           | Non widening       | 48,391   | 18,699         | 15,902         | 1,869         | 8,865         | 3,056         |
| Latvia             | LV           | Widening           | 1,920  | 644            | 453            | 228           | 378           | 217           |
| Lithuania          | LT           | Widening           | 2,659  | 837            | 770            | 397           | 279           | 376           |
| Luxembourg         | LU           | Non widening       | 2,291  | 434            | 1,215          | 78            | 464           | 100           |
| Malta              | MT           | Widening           | 1,026  | 380            | 331            | 166           | 89            | 60            |
| Netherlands        | NL           | Non widening       | 24,916   | 11,974         | 7,364          | 638           | 3,304         | 1,636         |
| Poland             | PL           | Widening           | 9,329  | 3,756          | 2,364          | 641           | 1,950         | 618           |
| Portugal           | PT           | Widening           | 15,329   | 4,422          | 4,735          | 992           | 4,222         | 958           |
| Romania            | RO           | Widening           | 6,248  | 1,565          | 2,109          | 669           | 1,101         | 804           |
| Slovakia           | SK           | Widening           | 2,102  | 627            | 692            | 228           | 302           | 253           |
| Slovenia           | SI           | Widening           | 4,899  | 1,201          | 1,389          | 344           | 1,610         | 355           |
| Spain              | ES           | Non widening       | 52,030   | 13,675         | 16,262         | 2,541         | 16,341        | 3,211         |
| Sweden             | SE           | Non widening       | 12,968   | 7,351          | 3,258          | 795           | 1,151         | 413           |
|                    |              |                    |  |                |                |               |               |               |
|                    |              | <b>Total EU-27</b> | <b>380,816</b>   | <b>134,359</b> | <b>118,994</b> | <b>17,219</b> | <b>82,140</b> | <b>28,104</b> |
|                    |              | <i>Widening</i>    | <i>92,303</i>  | <i>28,334</i>  | <i>30,429</i>  | <i>6,771</i>  | <i>19,182</i> | <i>7,587</i>  |

| <b>EU-27 Member State</b> | <b>Country code</b> | <b>Country group</b>        | <b>Horizon Europe applications in eligible proposals over 2021-2024</b> | <b>HES</b>     | <b>PRC</b>     | <b>PUB</b>    | <b>REC</b>    | <b>OTH</b>    |
|---------------------------|---------------------|-----------------------------|---|----------------|----------------|---------------|---------------|---------------|
|                           |                     | <i>Non-Widening</i>         | 288,513   | 106,025        | 88,565         | 10,448        | 62,958        | 20,517        |
|                           |                     | <b>Associated countries</b> | <b>58,817</b>   | <b>31,646</b>  | <b>14,639</b>  | <b>3,165</b>  | <b>6,702</b>  | <b>2,665</b>  |
|                           |                     | <b>Third countries</b>      | <b>25,990</b>   | <b>12,231</b>  | <b>5,765</b>   | <b>2,014</b>  | <b>4,061</b>  | <b>1,919</b>  |
|                           |                     | <b>Total Horizon Europe</b> | <b>465,623</b>  | <b>178,236</b> | <b>139,398</b> | <b>22,398</b> | <b>92,903</b> | <b>32,688</b> |

*Legend:*

*HES - Higher Education Institutions*

*REC- Research Organisations*

*PRC - Private-for-profit entities*

*PUB - Public bodies*

*OTH - Other*

Table 59: Horizon Europe % of all applications per country by type of organization

| EU-27 Member State | Country code | Country group | HES                               | PRC | PUB | REC | OTH |
|--------------------|--------------|---------------|-----------------------------------|-----|-----|-----|-----|
|                    |              |               | % of all applications per country |     |     |     |     |
| Austria            | AT           | Non widening  | 37%                               | 30% | 2%  | 25% | 6%  |
| Belgium            | BE           | Non widening  | 31%                               | 25% | 3%  | 16% | 25% |
| Bulgaria           | BG           | Widening      | 19%                               | 40% | 8%  | 17% | 16% |
| Croatia            | HR           | Widening      | 36%                               | 27% | 13% | 16% | 8%  |
| Cyprus             | CY           | Widening      | 24%                               | 55% | 6%  | 8%  | 6%  |
| Czechia            | CZ           | Widening      | 47%                               | 23% | 5%  | 18% | 7%  |
| Denmark            | DK           | Non widening  | 58%                               | 24% | 7%  | 6%  | 5%  |
| Estonia            | EE           | Widening      | 41%                               | 32% | 8%  | 5%  | 14% |
| Finland            | FI           | Non widening  | 48%                               | 24% | 5%  | 18% | 5%  |
| France             | FR           | Non widening  | 25%                               | 34% | 3%  | 31% | 7%  |
| Germany            | DE           | Non widening  | 37%                               | 31% | 2%  | 26% | 4%  |
| Greece             | EL           | Widening      | 27%                               | 37% | 5%  | 24% | 6%  |
| Hungary            | HU           | Widening      | 31%                               | 32% | 7%  | 18% | 13% |
| Ireland            | IE           | Non widening  | 51%                               | 36% | 3%  | 4%  | 6%  |



| EU-27 Member State | Country code | Country group      | HES          | PRC          | PUB         | REC          | OTH         |
|--------------------|--------------|--------------------|--------------|--------------|-------------|--------------|-------------|
| Italy              | IT           | Non widening       | 39%          | 33%          | 4%          | 18%          | 6%          |
| Latvia             | LV           | Widening           | 34%          | 24%          | 12%         | 20%          | 11%         |
| Lithuania          | LT           | Widening           | 31%          | 29%          | 15%         | 10%          | 14%         |
| Luxembourg         | LU           | Non widening       | 19%          | 53%          | 3%          | 20%          | 4%          |
| Malta              | MT           | Widening           | 37%          | 32%          | 16%         | 9%           | 6%          |
| Netherlands        | NL           | Non widening       | 48%          | 30%          | 3%          | 13%          | 7%          |
| Poland             | PL           | Widening           | 40%          | 25%          | 7%          | 21%          | 7%          |
| Portugal           | PT           | Widening           | 29%          | 31%          | 6%          | 28%          | 6%          |
| Romania            | RO           | Widening           | 25%          | 34%          | 11%         | 18%          | 13%         |
| Slovakia           | SK           | Widening           | 30%          | 33%          | 11%         | 14%          | 12%         |
| Slovenia           | SI           | Widening           | 25%          | 28%          | 7%          | 33%          | 7%          |
| Spain              | ES           | Non widening       | 26%          | 31%          | 5%          | 31%          | 6%          |
| Sweden             | SE           | Non widening       | 57%          | 25%          | 6%          | 9%           | 3%          |
|                    |              |                    |              |              |             |              |             |
|                    |              | <b>Total EU-27</b> | <b>35.3%</b> | <b>31.2%</b> | <b>4.5%</b> | <b>21.6%</b> | <b>7.4%</b> |
|                    |              | <i>Widening</i>    | <i>30.7%</i> | <i>33.0%</i> | <i>7.3%</i> | <i>20.8%</i> | <i>8.2%</i> |

| <b>EU-27 Member State</b> | <b>Country code</b> | <b>Country group</b>        | <b>HES</b>   | <b>PRC</b>   | <b>PUB</b>  | <b>REC</b>   | <b>OTH</b>  |
|---------------------------|---------------------|-----------------------------|--------------|--------------|-------------|--------------|-------------|
|                           |                     | <i>Non-Widening</i>         | 36.7%        | 30.7%        | 3.6%        | 21.8%        | 7.1%        |
|                           |                     | <b>Associated countries</b> | <b>53.8%</b> | <b>24.9%</b> | <b>5.4%</b> | <b>11.4%</b> | <b>4.5%</b> |
|                           |                     | <b>Third countries</b>      | <b>47.1%</b> | <b>22.2%</b> | <b>7.7%</b> | <b>15.6%</b> | <b>7.4%</b> |
|                           |                     | <b>Total Horizon Europe</b> | <b>38.3%</b> | <b>29.9%</b> | <b>4.8%</b> | <b>20.0%</b> | <b>7.0%</b> |

Table 60: Horizon Europe % of all applications per organization type

| EU-27 Member State | Country code | Country group | HES   | PRC | PUB | REC | OTH |
|--------------------|--------------|---------------|---|-----|-----|-----|-----|
|                    |              |               | % of all applications per organisation type |     |     |     |     |
| Austria            | AT           | Non widening  | 3%  | 3%  | 1%  | 4%  | 2%  |
| Belgium            | BE           | Non widening  | 4%  | 4%  | 3%  | 4%  | 16% |
| Bulgaria           | BG           | Widening      | 0%  | 1%  | 1%  | 1%  | 2%  |
| Croatia            | HR           | Widening      | 1%  | 1%  | 2%  | 1%  | 1%  |
| Cyprus             | CY           | Widening      | 1%  | 2%  | 1%  | 0%  | 1%  |
| Czechia            | CZ           | Widening      | 2%  | 1%  | 1%  | 1%  | 1%  |
| Denmark            | DK           | Non widening  | 3%  | 2%  | 3%  | 1%  | 2%  |
| Estonia            | EE           | Widening      | 1%  | 1%  | 1%  | 0%  | 1%  |
| Finland            | FI           | Non widening  | 3%  | 2%  | 2%  | 2%  | 2%  |
| France             | FR           | Non widening  | 5%  | 9%  | 5%  | 12% | 7%  |
| Germany            | DE           | Non widening  | 10%   | 10% | 5%  | 13% | 6%  |
| Greece             | EL           | Widening      | 4%  | 6%  | 6%  | 6%  | 5%  |
| Hungary            | HU           | Widening      | 1%  | 1%  | 1%  | 1%  | 2%  |
| Ireland            | IE           | Non widening  | 3%  | 2%  | 1%  | 0%  | 2%  |
| Italy              | IT           | Non widening  | 10%   | 11% | 8%  | 10% | 9%  |

|             |    |                             |             |             |             |             |             |
|-------------|----|-----------------------------|-------------|-------------|-------------|-------------|-------------|
| Latvia      | LV | Widening                    | 0%          | 0%          | 1%          | 0%          | 1%          |
| Lithuania   | LT | Widening                    | 0%          | 1%          | 2%          | 0%          | 1%          |
| Luxembourg  | LU | Non widening                | 0%          | 1%          | 0%          | 0%          | 0%          |
| Malta       | MT | Widening                    | 0%          | 0%          | 1%          | 0%          | 0%          |
| Netherlands | NL | Non widening                | 7%          | 5%          | 3%          | 4%          | 5%          |
| Poland      | PL | Widening                    | 2%          | 2%          | 3%          | 2%          | 2%          |
| Portugal    | PT | Widening                    | 2%          | 3%          | 4%          | 5%          | 3%          |
| Romania     | RO | Widening                    | 1%          | 2%          | 3%          | 1%          | 2%          |
| Slovakia    | SK | Widening                    | 0%          | 0%          | 1%          | 0%          | 1%          |
| Slovenia    | SI | Widening                    | 1%          | 1%          | 2%          | 2%          | 1%          |
| Spain       | ES | Non widening                | 8%          | 12%         | 11%         | 18%         | 10%         |
| Sweden      | SE | Non widening                | 4%          | 2%          | 4%          | 1%          | 1%          |
|             |    |                             |             |             |             |             |             |
|             |    | <b>Total EU-27</b>          | <b>75%</b>  | <b>85%</b>  | <b>77%</b>  | <b>88%</b>  | <b>86%</b>  |
|             |    | <i>Widening</i>             | <i>16%</i>  | <i>22%</i>  | <i>30%</i>  | <i>21%</i>  | <i>23%</i>  |
|             |    | <i>Non-Widening</i>         | <i>59%</i>  | <i>64%</i>  | <i>47%</i>  | <i>68%</i>  | <i>63%</i>  |
|             |    | <b>Associated countries</b> | <b>18%</b>  | <b>11%</b>  | <b>14%</b>  | <b>7%</b>   | <b>8%</b>   |
|             |    | <b>Third countries</b>      | <b>7%</b>   | <b>4%</b>   | <b>9%</b>   | <b>4%</b>   | <b>6%</b>   |
|             |    | <b>Total Horizon Europe</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> |

Table 61: Horizon Europe number of applications by pillar

| EU-27 Member State | Country code | Country group | Horizon Europe applications in eligible proposals over 2021-2024 | Pillar I               | Pillar II | Pillar III | Widening & ERA |
|--------------------|--------------|---------------|--|------------------------|-----------|------------|----------------|
|                    |              |               |  | Number of applications |           |            |                |
| Austria            | AT           | Non widening  | 13,139   | 3,371                  | 8,355     | 1,044      | 369            |
| Belgium            | BE           | Non widening  | 21,707   | 5,274                  | 14,462    | 1,507      | 464            |
| Bulgaria           | BG           | Widening      | 3,148  | 276                    | 2,210     | 253        | 409            |
| Croatia            | HR           | Widening      | 2,882  | 515                    | 1,774     | 217        | 376            |
| Cyprus             | CY           | Widening      | 5,261  | 588                    | 3,946     | 227        | 500            |
| Czechia            | CZ           | Widening      | 6,264  | 1,967                  | 3,257     | 437        | 603            |
| Denmark            | DK           | Non widening  | 10,373   | 4,009                  | 5,297     | 843        | 224            |
| Estonia            | EE           | Widening      | 3,300  | 579                    | 2,079     | 251        | 391            |
| Finland            | FI           | Non widening  | 10,632   | 3,091                  | 6,573     | 746        | 222            |
| France             | FR           | Non widening  | 35,620   | 12,344                 | 19,134    | 3,480      | 662            |
| Germany            | DE           | Non widening  | 47,656   | 15,532                 | 26,540    | 4,492      | 1,092          |
| Greece             | EL           | Widening      | 23,970   | 2,311                  | 18,886    | 1,286      | 1,487          |
| Hungary            | HU           | Widening      | 3,966  | 807                    | 2,465     | 371        | 323            |
| Ireland            | IE           | Non widening  | 8,790  | 2,543                  | 5,216     | 779        | 252            |
| Italy              | IT           | Non widening  | 48,391   | 13,153                 | 29,734    | 4,562      | 942            |

|             |    |                             |                |                |                |               |               |
|-------------|----|-----------------------------|----------------|----------------|----------------|---------------|---------------|
| Latvia      | LV | Widening                    | 1,920          | 285            | 1,214          | 161           | 260           |
| Lithuania   | LT | Widening                    | 2,659          | 317            | 1,726          | 302           | 314           |
| Luxembourg  | LU | Non widening                | 2,291          | 449            | 1,658          | 154           | 30            |
| Malta       | MT | Widening                    | 1,026          | 181            | 568            | 84            | 193           |
| Netherlands | NL | Non widening                | 24,916         | 8,355          | 13,704         | 2,305         | 552           |
| Poland      | PL | Widening                    | 9,329          | 2,257          | 5,565          | 809           | 698           |
| Portugal    | PT | Widening                    | 15,329         | 3,486          | 9,206          | 1,440         | 1,197         |
| Romania     | RO | Widening                    | 6,248          | 663            | 4,513          | 481           | 591           |
| Slovakia    | SK | Widening                    | 2,102          | 304            | 1,406          | 165           | 227           |
| Slovenia    | SI | Widening                    | 4,899          | 992            | 3,202          | 361           | 344           |
| Spain       | ES | Non widening                | 52,030         | 13,094         | 33,371         | 4,602         | 963           |
| Sweden      | SE | Non widening                | 12,968         | 4,487          | 6,939          | 1,258         | 284           |
|             |    |                             |                |                |                |               |               |
|             |    | <b>Total EU-27</b>          | <b>380,816</b> | <b>101,230</b> | <b>233,000</b> | <b>32,617</b> | <b>13,969</b> |
|             |    | <i>Widening</i>             | <i>92,303</i>  | <i>15,528</i>  | <i>62,017</i>  | <i>6,845</i>  | <i>7,913</i>  |
|             |    | <i>Non-Widening</i>         | <i>288,513</i> | <i>85,702</i>  | <i>170,983</i> | <i>25,772</i> | <i>6,056</i>  |
|             |    | <b>Associated countries</b> | <b>58,817</b>  | <b>20,808</b>  | <b>31,015</b>  | <b>4,110</b>  | <b>2,884</b>  |
|             |    | <b>Third countries</b>      | <b>25,990</b>  | <b>9,295</b>   | <b>15,111</b>  | <b>1,330</b>  | <b>254</b>    |
|             |    | <b>Total Horizon 2020</b>   | <b>465,623</b> | <b>131,333</b> | <b>279,126</b> | <b>38,057</b> | <b>17,107</b> |



Table 62: Horizon Europe % of applications of the country by pillar

| EU-27 Member State | Country code | Country group | Pillar I                                   | Pillar II | Pillar III | Widening & ERA |
|--------------------|--------------|---------------|--|-----------|------------|----------------|
|                    |              |               | % of applications of the country by pillar |           |            |                |
| Austria            | AT           | Non widening  | 26%  | 64%       | 8%         | 3%             |
| Belgium            | BE           | Non widening  | 24%  | 67%       | 7%         | 2%             |
| Bulgaria           | BG           | Widening      | 9%   | 70%       | 8%         | 13%            |
| Croatia            | HR           | Widening      | 18%  | 62%       | 8%         | 13%            |
| Cyprus             | CY           | Widening      | 11%  | 75%       | 4%         | 10%            |
| Czechia            | CZ           | Widening      | 31%  | 52%       | 7%         | 10%            |
| Denmark            | DK           | Non widening  | 39%  | 51%       | 8%         | 2%             |
| Estonia            | EE           | Widening      | 18%  | 63%       | 8%         | 12%            |
| Finland            | FI           | Non widening  | 29%  | 62%       | 7%         | 2%             |
| France             | FR           | Non widening  | 35%  | 54%       | 10%        | 2%             |
| Germany            | DE           | Non widening  | 33%  | 56%       | 9%         | 2%             |
| Greece             | EL           | Widening      | 10%  | 79%       | 5%         | 6%             |
| Hungary            | HU           | Widening      | 20%  | 62%       | 9%         | 8%             |
| Ireland            | IE           | Non widening  | 29%  | 59%       | 9%         | 3%             |
| Italy              | IT           | Non widening  | 27%  | 61%       | 9%         | 2%             |
| Latvia             | LV           | Widening      | 15%  | 63%       | 8%         | 14%            |
| Lithuania          | LT           | Widening      | 12%  | 65%       | 11%        | 12%            |

| EU-27 Member State | Country code | Country group               | Pillar I   | Pillar II  | Pillar III | Widening & ERA |
|--------------------|--------------|-----------------------------|------------|------------|------------|----------------|
| Luxembourg         | LU           | Non widening                | 20%        | 72%        | 7%         | 1%             |
| Malta              | MT           | Widening                    | 18%        | 55%        | 8%         | 19%            |
| Netherlands        | NL           | Non widening                | 34%        | 55%        | 9%         | 2%             |
| Poland             | PL           | Widening                    | 24%        | 60%        | 9%         | 7%             |
| Portugal           | PT           | Widening                    | 23%        | 60%        | 9%         | 8%             |
| Romania            | RO           | Widening                    | 11%        | 72%        | 8%         | 9%             |
| Slovakia           | SK           | Widening                    | 14%        | 67%        | 8%         | 11%            |
| Slovenia           | SI           | Widening                    | 20%        | 65%        | 7%         | 7%             |
| Spain              | ES           | Non widening                | 25%        | 64%        | 9%         | 2%             |
| Sweden             | SE           | Non widening                | 35%        | 54%        | 10%        | 2%             |
|                    |              |                             |            |            |            |                |
|                    |              | <b>Total EU-27</b>          | <b>27%</b> | <b>61%</b> | <b>9%</b>  | <b>4%</b>      |
|                    |              | <i>Widening</i>             | 17%        | 67%        | 7%         | 9%             |
|                    |              | <i>Non-Widening</i>         | 30%        | 59%        | 9%         | 2%             |
|                    |              | <b>Associated countries</b> | <b>35%</b> | <b>53%</b> | <b>7%</b>  | <b>5%</b>      |
|                    |              | <b>Third countries</b>      | <b>36%</b> | <b>58%</b> | <b>5%</b>  | <b>1%</b>      |
|                    |              | <b>Total Horizon 2020</b>   | <b>28%</b> | <b>60%</b> | <b>8%</b>  | <b>4%</b>      |

Table 63: Horizon Europe % of all applications per pillar

| EU-27 Member State | Country code | Country group | Pillar I                         | Pillar II | Pillar III | Widening & ERA |
|--------------------|--------------|---------------|----------------------------------|-----------|------------|----------------|
|                    |              |               | % of all applications per pillar |           |            |                |
| Austria            | AT           | Non widening  | 3%                               | 3%        | 3%         | 2%             |
| Belgium            | BE           | Non widening  | 4%                               | 5%        | 4%         | 3%             |
| Bulgaria           | BG           | Widening      | 0%                               | 1%        | 1%         | 2%             |
| Croatia            | HR           | Widening      | 0%                               | 1%        | 1%         | 2%             |
| Cyprus             | CY           | Widening      | 0%                               | 1%        | 1%         | 3%             |
| Czechia            | CZ           | Widening      | 1%                               | 1%        | 1%         | 4%             |
| Denmark            | DK           | Non widening  | 3%                               | 2%        | 2%         | 1%             |
| Estonia            | EE           | Widening      | 0%                               | 1%        | 1%         | 2%             |
| Finland            | FI           | Non widening  | 2%                               | 2%        | 2%         | 1%             |
| France             | FR           | Non widening  | 9%                               | 7%        | 9%         | 4%             |
| Germany            | DE           | Non widening  | 12%                              | 10%       | 12%        | 6%             |
| Greece             | EL           | Widening      | 2%                               | 7%        | 3%         | 9%             |
| Hungary            | HU           | Widening      | 1%                               | 1%        | 1%         | 2%             |
| Ireland            | IE           | Non widening  | 2%                               | 2%        | 2%         | 1%             |
| Italy              | IT           | Non widening  | 10%                              | 11%       | 12%        | 6%             |

|             |    |                             |             |             |             |             |
|-------------|----|-----------------------------|-------------|-------------|-------------|-------------|
| Latvia      | LV | Widening                    | 0%          | 0%          | 0%          | 2%          |
| Lithuania   | LT | Widening                    | 0%          | 1%          | 1%          | 2%          |
| Luxembourg  | LU | Non widening                | 0%          | 1%          | 0%          | 0%          |
| Malta       | MT | Widening                    | 0%          | 0%          | 0%          | 1%          |
| Netherlands | NL | Non widening                | 6%          | 5%          | 6%          | 3%          |
| Poland      | PL | Widening                    | 2%          | 2%          | 2%          | 4%          |
| Portugal    | PT | Widening                    | 3%          | 3%          | 4%          | 7%          |
| Romania     | RO | Widening                    | 1%          | 2%          | 1%          | 3%          |
| Slovakia    | SK | Widening                    | 0%          | 1%          | 0%          | 1%          |
| Slovenia    | SI | Widening                    | 1%          | 1%          | 1%          | 2%          |
| Spain       | ES | Non widening                | 10%         | 12%         | 12%         | 6%          |
| Sweden      | SE | Non widening                | 3%          | 2%          | 3%          | 2%          |
|             |    |                             |             |             |             |             |
|             |    | <b>Total EU-27</b>          | <b>77%</b>  | <b>83%</b>  | <b>86%</b>  | <b>82%</b>  |
|             |    | <i>Widening</i>             | 12%         | 22%         | 18%         | 46%         |
|             |    | <i>Non-Widening</i>         | 65%         | 61%         | 68%         | 35%         |
|             |    | <b>Associated countries</b> | <b>16%</b>  | <b>11%</b>  | <b>11%</b>  | <b>17%</b>  |
|             |    | <b>Third countries</b>      | <b>7%</b>   | <b>5%</b>   | <b>3%</b>   | <b>1%</b>   |
|             |    | <b>Total Horizon 2020</b>   | <b>100%</b> | <b>100%</b> | <b>100%</b> | <b>100%</b> |

Table 64: Participation in Horizon Europe by country (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Horizon Europe participations in signed grants over 2021-2024 | % of total | Horizon Europe participations in signed grants per year** | '000 scientists and engineers* | Share of scientists and engineers in EU27 | Participations per '000 scientists and engineers in the population | Number of Horizon Europe signed grants with at least 1 participant from the country | % of total Horizon Europe signed grants with at least 1 participant from the country |
|--------------------|--------------|-----------------|---|------------|---|--------------------------------|---|--|---|--|
| Austria            | AT           | Non-widening MS | 2,956   | 3.5%       | 806   | 459.4                          | 2.5%                                      | 6.4  | 1,872   | 13.0%  |
| Belgium            | BE           | Non-widening MS | 5,590   | 6.5%       | 1,525   | 548.8                          | 2.9%                                      | 10.2   | 3,260   | 22.6%  |
| Bulgaria           | BG           | Widening MS     | 634   | 0.7%       | 173   | 232.3                          | 1.2%                                      | 2.7  | 414   | 2.9%   |
| Cyprus             | CY           | Widening MS     | 888   | 1.0%       | 242   | 49.5                           | 0.3%                                      | 17.9   | 628   | 4.4%   |
| Czechia            | CZ           | Widening MS     | 1,366   | 1.6%       | 373   | 424.7                          | 2.3%                                      | 3.2  | 958   | 6.7%   |
| Germany            | DE           | Non-widening MS | 11,468  | 13.4%      | 3,128   | 3 958.0                        | 21.1%                                     | 2.9  | 5,720   | 39.7%  |
| Denmark            | DK           | Non-widening MS | 2,533   | 3.0%       | 691   | 345.8                          | 1.8%                                      | 7.3  | 1,747   | 12.1%  |
| Estonia            | EE           | Widening MS     | 678   | 0.8%       | 185   | 71.5                           | 0.4%                                      | 9.5  | 516   | 3.6%   |
| Greece             | EL           | Widening MS     | 4,553   | 5.3%       | 1,242   | 372.9                          | 2.0%                                      | 12.2   | 2,085   | 14.5%  |
| Spain              | ES           | Non-widening MS | 11,473  | 13.4%      | 3,129   | 1 762.9                        | 9.4%                                      | 6.5  | 4,813   | 33.4%  |
| Finland            | FI           | Non-widening MS | 2,468   | 2.9%       | 673   | 318.3                          | 1.7%                                      | 7.8  | 1,450   | 10.1%  |
| France             | FR           | Non-widening MS | 9,380   | 11.0%      | 2,558   | 2 876.9                        | 15.4%                                     | 3.3  | 4,355   | 30.3%  |
| Croatia            | HR           | Widening MS     | 562   | 0.7%       | 153   | 120.0                          | 0.6%                                      | 4.7  | 354   | 2.5%   |
| Hungary            | HU           | Widening MS     | 792   | 0.9%       | 216   | 340.5                          | 1.8%                                      | 2.3  | 576   | 4.0%   |
| Ireland            | IE           | Non-widening MS | 1,952   | 2.3%       | 532   | 343.4                          | 1.8%                                      | 5.7  | 1,346   | 9.4%   |
| Italy              | IT           | Non-widening MS | 9,843   | 11.5%      | 2,684   | 1 224.0                        | 6.5%                                      | 8.0  | 4,556   | 31.6%  |
| Lithuania          | LT           | Widening MS     | 537   | 0.6%       | 146   | 149.5                          | 0.8%                                      | 3.6  | 400   | 2.8%   |
| Luxembourg         | LU           | Non-widening MS | 461   | 0.5%       | 126   | 39.9                           | 0.2%                                      | 11.6   | 367   | 2.5%   |
| Latvia             | LV           | Widening MS     | 368   | 0.4%       | 100   | 73.6                           | 0.4%                                      | 5.0  | 284   | 2.0%   |
| Malta              | MT           | Widening MS     | 202   | 0.2%       | 55  | 26.5                           | 0.1%                                      | 7.6  | 151   | 1.0%   |
| Netherlands        | NL           | Non-widening MS | 6,425   | 7.5%       | 1,752   | 1 228.7                        | 6.6%                                      | 5.2  | 3,630   | 25.2%  |

| EU-27 Member State | Country code | Country group   | Horizon Europe participations in signed grants over 2021-2024 | % of total | Horizon Europe participations in signed grants per year** | '000 scientists and engineers* | Share of scientists and engineers in EU27 | Participations per '000 scientists and engineers in the population | Number of Horizon Europe signed grants with at least 1 participant from the country | % of total Horizon Europe signed grants with at least 1 participant from the country |
|--------------------|--------------|-----------------|---|------------|---|--------------------------------|---|--|---|--|
| Poland             | PL           | Widening MS     | 1,821   | 2.1%       | 497   | 1 630.1                        | 8.7%                                      | 1.1  | 1,254   | 8.7%   |
| Portugal           | PT           | Widening MS     | 2,876   | 3.4%       | 784   | 519.8                          | 2.8%                                      | 5.5  | 1,700   | 11.8%  |
| Romania            | RO           | Widening MS     | 1,098   | 1.3%       | 299   | 582.0                          | 3.1%                                      | 1.9  | 702   | 4.9%   |
| Sweden             | SE           | Non-widening MS | 2,892   | 3.4%       | 789   | 767.3                          | 4.1%                                      | 3.8  | 1,890   | 13.1%  |
| Slovenia           | SI           | Widening MS     | 1,110   | 1.3%       | 303   | 96.4                           | 0.5%                                      | 11.5   | 727   | 5.1%   |
| Slovakia           | SK           | Widening MS     | 425   | 0.5%       | 116   | 160.3                          | 0.9%                                      | 2.7  | 321   | 2.2%   |

|                             |                |               |              |                 |               |            |               |               |
|-----------------------------|----------------|---------------|--------------|-----------------|---------------|------------|---------------|---------------|
| <b>Total EU-27</b>          | <b>85 351</b>  | <b>100.0%</b> | 23 278       | <b>18,723.0</b> | <b>100.0%</b> | <b>4.6</b> | <b>14,395</b> | <b>95.0%</b>  |
| Widening MS                 | 17 910         | 21.0%         | 4 885        | 4,849.6         | 25.9%         | 3.7        | 5,494         | 36.3%         |
| Non-widening MS             | 67 441         | 79.0%         | 18 393       | 13,873.4        | 74.1%         | 4.9        | 13,596        | 89.8%         |
| Associated countries        | 10 200         | 10.0%         | <b>2 782</b> |                 |               |            | <b>4,689</b>  | <b>31.0%</b>  |
| Third countries             | 6 045          | 6.0%          | <b>1 649</b> |                 |               |            | <b>2,816</b>  | <b>18.6%</b>  |
| <b>Total Horizon Europe</b> | <b>101 596</b> | <b>100.0%</b> | 27 708       |                 |               |            | <b>15,148</b> | <b>100.0%</b> |

\* Source: Eurostat, Employed HRST by category, age and occupation [hrst\_st\_nocc] 2023.

Available for EU Member States only.



Table 65: Participation in Horizon Europe by country and organisation type (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Horizon Europe investments in signed grants (EUR million) over 2021-2024 | % of total Horizon Europe investment | % of Horizon Europe investment in EU-27 | Horizon Europe investments in signed grants (EUR million) per year | Yearly GERD (in EUR million)* | Yearly Horizon Europe investment in EUR per EUR million of GERD |
|--------------------|--------------|-----------------|--|--------------------------------------|---|--|-------------------------------|---|
| Austria            | AT           | Non-widening MS | 1 393  | 3.2%                                 | 3.5%                                    | 380  | 14908.47                      | 25 491  |
| Belgium            | BE           | Non-widening MS | 3 354  | 7.8%                                 | 8.5%                                    | 915  | 19185.6965                    | 47 673  |
| Bulgaria           | BG           | Widening MS     | 165  | 0.4%                                 | 0.4%                                    | 45   | 698.7235                      | 64 445  |
| Cyprus             | CY           | Widening MS     | 300  | 0.7%                                 | 0.8%                                    | 82   | 210.2575                      | 389 674   |
| Czechia            | CZ           | Widening MS     | 481  | 1.1%                                 | 1.2%                                    | 131  | 5623.1335                     | 23 345  |
| Germany            | DE           | Non-widening MS | 6 832  | 15.8%                                | 17.3%                                   | 1 863  | 125696.629                    | 14 823  |
| Denmark            | DK           | Non-widening MS | 1 239  | 2.9%                                 | 3.1%                                    | 338  | 11100.3205                    | 30 443  |
| Estonia            | EE           | Widening MS     | 259  | 0.6%                                 | 0.7%                                    | 71   | 671.9625                      | 105 235   |
| Greece             | EL           | Widening MS     | 1 689  | 3.9%                                 | 4.3%                                    | 461  | 3216.493                      | 143 183   |
| Spain              | ES           | Non-widening MS | 4 563  | 10.6%                                | 11.6%                                   | 1 244  | 20851.9545                    | 59 677  |
| Finland            | FI           | Non-widening MS | 1 228  | 2.8%                                 | 3.1%                                    | 335  | 8187.77                       | 40 893  |
| France             | FR           | Non-widening MS | 4 897  | 11.3%                                | 12.4%                                   | 1 336  | 60329.777                     | 22 139  |
| Croatia            | HR           | Widening MS     | 136  | 0.3%                                 | 0.3%                                    | 37   | 1021.205                      | 36 190  |
| Hungary            | HU           | Widening MS     | 199  | 0.5%                                 | 0.5%                                    | 54   | 2538.434                      | 21 363  |
| Ireland            | IE           | Non-widening MS | 902  | 2.1%                                 | 2.3%                                    | 246  | 4559.7465                     | 53 978  |
| Italy              | IT           | Non-widening MS | 3 655  | 8.5%                                 | 9.3%                                    | 997  | 27612.643                     | 36 103  |
| Lithuania          | LT           | Widening MS     | 157  | 0.4%                                 | 0.4%                                    | 43   | 741.1585                      | 57 682  |
| Luxembourg         | LU           | Non-widening MS | 197  | 0.5%                                 | 0.5%                                    | 54   | 819.0275                      | 65 572  |
| Latvia             | LV           | Widening MS     | 99   | 0.2%                                 | 0.3%                                    | 27   | 308.3535                      | 87 709  |
| Malta              | MT           | Widening MS     | 46   | 0.1%                                 | 0.1%                                    | 12   | 115.758                       | 107 498   |
| Netherlands        | NL           | Non-widening MS | 3 793  | 8.8%                                 | 9.6%                                    | 1 034  | 21923.168                     | 47 187  |

| EU-27 Member State | Country code | Country group   | Horizon Europe investments in signed grants (EUR million) over 2021-2024 | % of total Horizon Europe investment | % of Horizon Europe investment in EU-27 | Horizon Europe investments in signed grants (EUR million) per year | Yearly GERD (in EUR million)* | Yearly Horizon Europe investment in EUR per EUR million of GERD |
|--------------------|--------------|-----------------|--|--------------------------------------|---|--|-------------------------------|---|
| Poland             | PL           | Widening MS     | 670  | 1.5%                                 | 1.7%                                    | 183  | 10616.877                     | 17 203  |
| Portugal           | PT           | Widening MS     | 998  | 2.3%                                 | 2.5%                                    | 272  | 4323.392                      | 62 931  |
| Romania            | RO           | Widening MS     | 288  | 0.7%                                 | 0.7%                                    | 78   | 1489.6915                     | 52 672  |
| Sweden             | SE           | Non-widening MS | 1 445  | 3.3%                                 | 3.7%                                    | 394  | 19240.1825                    | 20 477  |
| Slovenia           | SI           | Widening MS     | 358  | 0.8%                                 | 0.9%                                    | 98   | 1279.8545                     | 76 297  |
| Slovakia           | SK           | Widening MS     | 109  | 0.3%                                 | 0.3%                                    | 30   | 1177.459                      | 25 183  |

|                             |               |               |             |               |                |               |
|-----------------------------|---------------|---------------|-------------|---------------|----------------|---------------|
| <b>Total EU-27</b>          | <b>39 451</b> | <b>91.3%</b>  | <b>100%</b> | <b>10 759</b> | <b>368 448</b> | <b>29 127</b> |
| Widening MS                 | 5 952         | 13.8%         | 15.10%      | 1 623         | 34 033         | 46 631        |
| Non-widening MS             | 33 498        | 77.5%         | 84.90%      | 9 136         | 334 415        | 26 330        |
| Associated countries        | 3 238         | 7.5%          |             |               |                |               |
| Third countries             | 526           | 1.2%          |             |               |                |               |
| <b>Total Horizon Europe</b> | <b>43 215</b> | <b>100.0%</b> |             |               |                |               |

\* Source for GERD (Gross Domestic Expenditure in Research and Development): Eurostat, GERD by sector of performance [rd\_e\_gerdtot] avg 2022-2023. Available for EU Member States only.

Table 66: Participation in Horizon Europe by type of organisation (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Horizon Europe participations in signed grants | HES   | PRC   | PUB | REC   | OTH   |
|--------------------|--------------|-----------------|--|-------|-------|-----|-------|-------|
|                    |              |                 |  |       |       |     |       |       |
| Austria            | AT           | Non-widening MS | 2 956  | 994   | 954   | 81  | 733   | 194   |
| Belgium            | BE           | Non-widening MS | 5 590  | 1 483 | 1 357 | 174 | 1,054 | 1,522 |
| Bulgaria           | BG           | Widening MS     | 634  | 134   | 229   | 75  | 94    | 102   |
| Cyprus             | CY           | Widening MS     | 888  | 234   | 470   | 54  | 61    | 69    |
| Czechia            | CZ           | Widening MS     | 1 366  | 575   | 333   | 83  | 253   | 122   |
| Germany            | DE           | Non-widening MS | 11 468   | 3 829 | 3 694 | 234 | 3,110 | 601   |
| Denmark            | DK           | Non-widening MS | 2 533  | 1 359 | 603   | 234 | 158   | 179   |
| Estonia            | EE           | Widening MS     | 678  | 261   | 204   | 64  | 33    | 116   |
| Greece             | EL           | Widening MS     | 4 553  | 1 100 | 1 788 | 218 | 1,146 | 301   |
| Spain              | ES           | Non-widening MS | 11 473   | 2 547 | 3 721 | 620 | 3,784 | 801   |
| Finland            | FI           | Non-widening MS | 2 468  | 957   | 657   | 149 | 548   | 157   |
| France             | FR           | Non-widening MS | 9 380  | 2 181 | 3 297 | 337 | 2,924 | 641   |
| Croatia            | HR           | Widening MS     | 562  | 181   | 162   | 72  | 84    | 63    |
| Hungary            | HU           | Widening MS     | 792  | 209   | 223   | 71  | 162   | 127   |
| Ireland            | IE           | Non-widening MS | 1 952  | 893   | 735   | 85  | 87    | 152   |
| Italy              | IT           | Non-widening MS | 9 843  | 3 397 | 3 439 | 388 | 1,930 | 689   |
| Lithuania          | LT           | Widening MS     | 537  | 166   | 142   | 93  | 56    | 80    |
| Luxembourg         | LU           | Non-widening MS | 461  | 76    | 238   | 22  | 104   | 21    |
| Latvia             | LV           | Widening MS     | 368  | 107   | 87    | 48  | 84    | 42    |
| Malta              | MT           | Widening MS     | 202  | 75    | 56    | 52  | 10    | 9     |
| Netherlands        | NL           | Non-widening MS | 6 425  | 2 630 | 1 979 | 183 | 1,096 | 537   |
| Poland             | PL           | Widening MS     | 1 821  | 647   | 459   | 146 | 399   | 170   |

| EU-27 Member State | Country code | Country group   | Horizon Europe participations in signed grants | HES           | PRC | PUB | REC | OTH |
|--------------------|--------------|-----------------|--|---------------|-----|-----|-----|-----|
|                    |              |                 |  | Participation |     |     |     |     |
| Portugal           | PT           | Widening MS     | 2 876  | 758           | 875 | 239 | 812 | 192 |
| Romania            | RO           | Widening MS     | 1 098  | 260           | 308 | 150 | 238 | 142 |
| Sweden             | SE           | Non-widening MS | 2 892  | 1 495         | 794 | 207 | 283 | 113 |
| Slovenia           | SI           | Widening MS     | 1 110  | 254           | 344 | 85  | 344 | 83  |
| Slovakia           | SK           | Widening MS     | 425  | 113           | 117 | 62  | 71  | 62  |

|                             |                |               |               |              |               |              |
|-----------------------------|----------------|---------------|---------------|--------------|---------------|--------------|
| <b>Total EU-27</b>          | <b>85,351</b>  | <b>26,915</b> | <b>27 265</b> | <b>4 226</b> | <b>19 658</b> | <b>7 287</b> |
| Widening MS                 | 17,910         | 5,074         | 5 797         | 1 512        | 3 847         | 1 680        |
| Non-widening MS             | 67,441         | 21,841        | 21 468        | 2 714        | 15 811        | 5 607        |
| Associated countries        | 10,200         | 4,709         | 2 662         | 595          | 1 600         | 634          |
| Third countries             | 6,045          | 2,903         | 1 268         | 432          | 968           | 474          |
| <b>Total Horizon Europe</b> | <b>101,596</b> | <b>34,527</b> | <b>31 195</b> | <b>5 253</b> | <b>22 226</b> | <b>8 395</b> |

Table 67: Participation in Horizon Europe by type of organisation (continued) (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | HES  | PRC   | PUB   | REC   | OTH   | HES                              | PRC   | PUB   | REC   | OTH   |
|--------------------|--------------|-----------------|--|-------|-------|-------|-------|----------------------------------|-------|-------|-------|-------|
|                    |              |                 | % of all projects of specific organisation types |       |       |       |       | % of all projects of the country |       |       |       |       |
| Austria            | AT           | Non-widening MS | 2.9%   | 3.1%  | 1.5%  | 3.3%  | 2.3%  | 33.6%                            | 32.3% | 2.7%  | 24.8% | 6.6%  |
| Belgium            | BE           | Non-widening MS | 4.3%   | 4.4%  | 3.3%  | 4.7%  | 18.1% | 26.5%                            | 24.3% | 3.1%  | 18.9% | 27.2% |
| Bulgaria           | BG           | Widening MS     | 0.4%   | 0.7%  | 1.4%  | 0.4%  | 1.2%  | 21.1%                            | 36.1% | 11.8% | 14.8% | 16.1% |
| Cyprus             | CY           | Widening MS     | 0.7%   | 1.5%  | 1.0%  | 0.3%  | 0.8%  | 26.4%                            | 52.9% | 6.1%  | 6.9%  | 7.8%  |
| Czechia            | CZ           | Widening MS     | 1.7%   | 1.1%  | 1.6%  | 1.1%  | 1.5%  | 42.1%                            | 24.4% | 6.1%  | 18.5% | 8.9%  |
| Germany            | DE           | Non-widening MS | 11.1%  | 11.8% | 4.5%  | 14.0% | 7.2%  | 33.4%                            | 32.2% | 2.0%  | 27.1% | 5.2%  |
| Denmark            | DK           | Non-widening MS | 3.9%   | 1.9%  | 4.5%  | 0.7%  | 2.1%  | 53.7%                            | 23.8% | 9.2%  | 6.2%  | 7.1%  |
| Estonia            | EE           | Widening MS     | 0.8%   | 0.7%  | 1.2%  | 0.1%  | 1.4%  | 38.5%                            | 30.1% | 9.4%  | 4.9%  | 17.1% |
| Greece             | EL           | Widening MS     | 3.2%   | 5.7%  | 4.2%  | 5.2%  | 3.6%  | 24.2%                            | 39.3% | 4.8%  | 25.2% | 6.6%  |
| Spain              | ES           | Non-widening MS | 7.4%   | 11.9% | 11.8% | 17.0% | 9.5%  | 22.2%                            | 32.4% | 5.4%  | 33.0% | 7.0%  |
| Finland            | FI           | Non-widening MS | 2.8%   | 2.1%  | 2.8%  | 2.5%  | 1.9%  | 38.8%                            | 26.6% | 6.0%  | 22.2% | 6.4%  |
| France             | FR           | Non-widening MS | 6.3%   | 10.6% | 6.4%  | 13.2% | 7.6%  | 23.3%                            | 35.1% | 3.6%  | 31.2% | 6.8%  |
| Croatia            | HR           | Widening MS     | 0.5%   | 0.5%  | 1.4%  | 0.4%  | 0.8%  | 32.2%                            | 28.8% | 12.8% | 14.9% | 11.2% |
| Hungary            | HU           | Widening MS     | 0.6%   | 0.7%  | 1.4%  | 0.7%  | 1.5%  | 26.4%                            | 28.2% | 9.0%  | 20.5% | 16.0% |
| Ireland            | IE           | Non-widening MS | 2.6%   | 2.4%  | 1.6%  | 0.4%  | 1.8%  | 45.7%                            | 37.7% | 4.4%  | 4.5%  | 7.8%  |
| Italy              | IT           | Non-widening MS | 9.8%   | 11.0% | 7.4%  | 8.7%  | 8.2%  | 34.5%                            | 34.9% | 3.9%  | 19.6% | 7.0%  |
| Lithuania          | LT           | Widening MS     | 0.5%   | 0.5%  | 1.8%  | 0.3%  | 1.0%  | 30.9%                            | 26.4% | 17.3% | 10.4% | 14.9% |
| Luxembourg         | LU           | Non-widening MS | 0.2%   | 0.8%  | 0.4%  | 0.5%  | 0.3%  | 16.5%                            | 51.6% | 4.8%  | 22.6% | 4.6%  |
| Latvia             | LV           | Widening MS     | 0.3%   | 0.3%  | 0.9%  | 0.4%  | 0.5%  | 29.1%                            | 23.6% | 13.0% | 22.8% | 11.4% |
| Malta              | MT           | Widening MS     | 0.2%   | 0.2%  | 1.0%  | 0.0%  | 0.1%  | 37.1%                            | 27.7% | 25.7% | 5.0%  | 4.5%  |
| Netherlands        | NL           | Non-widening MS | 7.6%   | 6.3%  | 3.5%  | 4.9%  | 6.4%  | 40.9%                            | 30.8% | 2.8%  | 17.1% | 8.4%  |
| Poland             | PL           | Widening MS     | 1.9%   | 1.5%  | 2.8%  | 1.8%  | 2.0%  | 35.5%                            | 25.2% | 8.0%  | 21.9% | 9.3%  |
| Portugal           | PT           | Widening MS     | 2.2%   | 2.8%  | 4.5%  | 3.7%  | 2.3%  | 26.4%                            | 30.4% | 8.3%  | 28.2% | 6.7%  |
| Romania            | RO           | Widening MS     | 0.8%   | 1.0%  | 2.9%  | 1.1%  | 1.7%  | 23.7%                            | 28.1% | 13.7% | 21.7% | 12.9% |

|          |    |                 |      |      |      |      |      |       |       |       |       |       |
|----------|----|-----------------|------|------|------|------|------|-------|-------|-------|-------|-------|
| Sweden   | SE | Non-widening MS | 4.3% | 2.5% | 3.9% | 1.3% | 1.3% | 51.7% | 27.5% | 7.2%  | 9.8%  | 3.9%  |
| Slovenia | SI | Widening MS     | 0.7% | 1.1% | 1.6% | 1.5% | 1.0% | 22.9% | 31.0% | 7.7%  | 31.0% | 7.5%  |
| Slovakia | SK | Widening MS     | 0.3% | 0.4% | 1.2% | 0.3% | 0.7% | 26.6% | 27.5% | 14.6% | 16.7% | 14.6% |

|                             |               |               |               |               |               |              |              |             |              |             |
|-----------------------------|---------------|---------------|---------------|---------------|---------------|--------------|--------------|-------------|--------------|-------------|
| <b>Total EU-27</b>          | <b>78.0%</b>  | <b>87.4%</b>  | <b>80.4%</b>  | <b>88.4%</b>  | <b>86.8%</b>  | <b>31.5%</b> | <b>31.9%</b> | <b>5.0%</b> | <b>23.0%</b> | <b>8.5%</b> |
| Widening MS                 | 14.7%         | 18.6%         | 28.8%         | 17.3%         | 20.0%         | 28.3%        | 32.4%        | 8.4%        | 21.5%        | 9.4%        |
| Non-widening MS             | 63.3%         | 68.8%         | 51.7%         | 71.1%         | 66.8%         | 32.4%        | 31.8%        | 4.0%        | 23.4%        | 8.3%        |
| Associated countries        | 13.6%         | 8.5%          | 11.3%         | 7.2%          | 7.6%          | 46.2%        | 26.1%        | 5.8%        | 15.7%        | 6.2%        |
| Third countries             | 8.4%          | 4.1%          | 8.2%          | 4.4%          | 5.6%          | 48.0%        | 21.0%        | 7.1%        | 16.0%        | 7.8%        |
| <b>Total Horizon Europe</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>100.0%</b> | <b>34.0%</b> | <b>30.7%</b> | <b>5.2%</b> | <b>21.9%</b> | <b>8.3%</b> |

Table 68: Investment in Horizon Europe by type of organisation (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   |  | Horizon Europe investment s in signed grants (EUR million) over 2021-2024 | HES   | PRC   | PUB | REC   | OTH |
|--------------------|--------------|-----------------|--|---|-------|-------|-----|-------|-----|
|                    |              |                 |  |   |       |       |     |       |     |
| Austria            | AT           | Non-widening MS |  | 1 393   | 575   | 356   | 25  | 359   | 78  |
| Belgium            | BE           | Non-widening MS |  | 3 354   | 887   | 493   | 62  | 976   | 936 |
| Bulgaria           | BG           | Widening MS     |  | 165   | 47    | 70    | 13  | 22    | 13  |
| Cyprus             | CY           | Widening MS     |  | 300   | 100   | 146   | 7   | 29    | 18  |
| Czechia            | CZ           | Widening MS     |  | 481   | 248   | 109   | 15  | 77    | 32  |
| Germany            | DE           | Non-widening MS |  | 6 832   | 2 326 | 1 963 | 142 | 2 159 | 242 |
| Denmark            | DK           | Non-widening MS |  | 1 239   | 789   | 221   | 107 | 70    | 51  |
| Estonia            | EE           | Widening MS     |  | 259   | 128   | 91    | 8   | 11    | 22  |
| Greece             | EL           | Widening MS     |  | 1 689   | 465   | 558   | 43  | 543   | 79  |



|             |    |                 |       |       |       |     |       |     |
|-------------|----|-----------------|-------|-------|-------|-----|-------|-----|
| Spain       | ES | Non-widening MS | 4 563 | 993   | 1 479 | 163 | 1 740 | 187 |
| Finland     | FI | Non-widening MS | 1 228 | 534   | 273   | 47  | 330   | 43  |
| France      | FR | Non-widening MS | 4 897 | 761   | 1 632 | 155 | 2 049 | 300 |
| Croatia     | HR | Widening MS     | 136   | 42    | 50    | 11  | 26    | 7   |
| Hungary     | HU | Widening MS     | 199   | 46    | 63    | 22  | 44    | 24  |
| Ireland     | IE | Non-widening MS | 902   | 509   | 278   | 24  | 35    | 57  |
| Italy       | IT | Non-widening MS | 3 655 | 1 393 | 1 188 | 194 | 741   | 140 |
| Lithuania   | LT | Widening MS     | 157   | 58    | 45    | 23  | 13    | 17  |
| Luxembourg  | LU | Non-widening MS | 197   | 29    | 102   | 9   | 54    | 3   |
| Latvia      | LV | Widening MS     | 99    | 33    | 28    | 7   | 25    | 7   |
| Malta       | MT | Widening MS     | 46    | 19    | 15    | 8   | 3     | 1   |
| Netherlands | NL | Non-widening MS | 3 793 | 1 729 | 997   | 86  | 757   | 225 |
| Poland      | PL | Widening MS     | 670   | 229   | 162   | 41  | 163   | 75  |
| Portugal    | PT | Widening MS     | 998   | 296   | 258   | 41  | 369   | 34  |
| Romania     | RO | Widening MS     | 288   | 77    | 90    | 24  | 74    | 23  |
| Sweden      | SE | Non-widening MS | 1 445 | 851   | 331   | 99  | 138   | 25  |
| Slovenia    | SI | Widening MS     | 358   | 82    | 108   | 16  | 138   | 14  |
| Slovakia    | SK | Widening MS     | 109   | 31    | 35    | 7   | 25    | 11  |

|                             |               |               |               |              |               |              |
|-----------------------------|---------------|---------------|---------------|--------------|---------------|--------------|
| <b>Total EU-27</b>          | <b>39 451</b> | <b>13 276</b> | <b>11 139</b> | <b>1 401</b> | <b>10 970</b> | <b>2 664</b> |
| Widening MS                 | 5 952         | 1 900         | 1 827         | 287          | 1 561         | 378          |
| Non-widening MS             | 33 498        | 11 376        | 9 313         | 1 114        | 9 409         | 2 287        |
| Associated countries        | 3 238         | 1 512         | 708           | 141          | 781           | 96           |
| Third countries             | 526           | 211           | 49            | 38           | 179           | 49           |
| <b>Total Horizon Europe</b> | <b>43 215</b> | <b>14 999</b> | <b>11 896</b> | <b>1 580</b> | <b>11 930</b> | <b>2 810</b> |

Table 69: Investment in Horizon Europe by type of organisation (continued) (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | HES   | PRC   | PUB   | REC   | OTH   | HES                               | PRC   | PUB   | REC   | OTH   |
|--------------------|--------------|-----------------|---|-------|-------|-------|-------|-----------------------------------|-------|-------|-------|-------|
|                    |              |                 | % investments in countries by organisation type |       |       |       |       | % investment in organisation type |       |       |       |       |
| Austria            | AT           | Non-widening MS | 41.3%   | 25.5% | 1.8%  | 25.8% | 5.6%  | 3.8%                              | 3.0%  | 1.6%  | 3.0%  | 2.8%  |
| Belgium            | BE           | Non-widening MS | 26.4%   | 14.7% | 1.8%  | 29.1% | 27.9% | 5.9%                              | 4.1%  | 3.9%  | 8.2%  | 33.3% |
| Bulgaria           | BG           | Widening MS     | 28.2%   | 42.3% | 8.0%  | 13.6% | 7.9%  | 0.3%                              | 0.6%  | 0.8%  | 0.2%  | 0.5%  |
| Cyprus             | CY           | Widening MS     | 33.2%   | 48.7% | 2.4%  | 9.7%  | 6.0%  | 0.7%                              | 1.2%  | 0.5%  | 0.2%  | 0.6%  |
| Czechia            | CZ           | Widening MS     | 51.4%   | 22.7% | 3.2%  | 16.1% | 6.6%  | 1.7%                              | 0.9%  | 1.0%  | 0.6%  | 1.1%  |
| Germany            | DE           | Non-widening MS | 34.0%   | 28.7% | 2.1%  | 31.6% | 3.5%  | 15.5%                             | 16.5% | 9.0%  | 18.1% | 8.6%  |
| Denmark            | DK           | Non-widening MS | 63.7%   | 17.9% | 8.7%  | 5.7%  | 4.1%  | 5.3%                              | 1.9%  | 6.8%  | 0.6%  | 1.8%  |
| Estonia            | EE           | Widening MS     | 49.4%   | 34.9% | 3.0%  | 4.1%  | 8.6%  | 0.9%                              | 0.8%  | 0.5%  | 0.1%  | 0.8%  |
| Greece             | EL           | Widening MS     | 27.5%   | 33.0% | 2.5%  | 32.2% | 4.7%  | 3.1%                              | 4.7%  | 2.7%  | 4.6%  | 2.8%  |
| Spain              | ES           | Non-widening MS | 21.8%   | 32.4% | 3.6%  | 38.1% | 4.1%  | 6.6%                              | 12.4% | 10.3% | 14.6% | 6.7%  |
| Finland            | FI           | Non-widening MS | 43.5%   | 22.2% | 3.8%  | 26.9% | 3.5%  | 3.6%                              | 2.3%  | 3.0%  | 2.8%  | 1.5%  |
| France             | FR           | Non-widening MS | 15.5%   | 33.3% | 3.2%  | 41.8% | 6.1%  | 5.1%                              | 13.7% | 9.8%  | 17.2% | 10.7% |
| Croatia            | HR           | Widening MS     | 30.8%   | 36.8% | 8.0%  | 18.9% | 5.5%  | 0.3%                              | 0.4%  | 0.7%  | 0.2%  | 0.3%  |
| Hungary            | HU           | Widening MS     | 23.1%   | 31.7% | 11.2% | 22.0% | 12.0% | 0.3%                              | 0.5%  | 1.4%  | 0.4%  | 0.8%  |
| Ireland            | IE           | Non-widening MS | 56.4%   | 30.8% | 2.7%  | 3.9%  | 6.3%  | 3.4%                              | 2.3%  | 1.5%  | 0.3%  | 2.0%  |
| Italy              | IT           | Non-widening MS | 38.1%   | 32.5% | 5.3%  | 20.3% | 3.8%  | 9.3%                              | 10.0% | 12.3% | 6.2%  | 5.0%  |
| Lithuania          | LT           | Widening MS     | 37.0%   | 28.8% | 14.6% | 8.5%  | 11.1% | 0.4%                              | 0.4%  | 1.4%  | 0.1%  | 0.6%  |
| Luxembourg         | LU           | Non-widening MS | 14.6%   | 51.8% | 4.4%  | 27.6% | 1.6%  | 0.2%                              | 0.9%  | 0.6%  | 0.5%  | 0.1%  |
| Latvia             | LV           | Widening MS     | 33.4%   | 27.8% | 7.4%  | 24.8% | 6.7%  | 0.2%                              | 0.2%  | 0.5%  | 0.2%  | 0.2%  |
| Malta              | MT           | Widening MS     | 41.3%   | 32.2% | 18.2% | 7.0%  | 1.3%  | 0.1%                              | 0.1%  | 0.5%  | 0.0%  | 0.0%  |
| Netherlands        | NL           | Non-widening MS | 45.6%   | 26.3% | 2.3%  | 19.9% | 5.9%  | 11.5%                             | 8.4%  | 5.5%  | 6.3%  | 8.0%  |
| Poland             | PL           | Widening MS     | 34.1%   | 24.2% | 6.1%  | 24.3% | 11.3% | 1.5%                              | 1.4%  | 2.6%  | 1.4%  | 2.7%  |
| Portugal           | PT           | Widening MS     | 29.7%   | 25.8% | 4.1%  | 36.9% | 3.4%  | 2.0%                              | 2.2%  | 2.6%  | 3.1%  | 1.2%  |

|          |    |                 |       |       |      |       |      |      |      |      |      |      |
|----------|----|-----------------|-------|-------|------|-------|------|------|------|------|------|------|
| Romania  | RO | Widening MS     | 26.8% | 31.1% | 8.4% | 25.6% | 8.1% | 0.5% | 0.8% | 1.5% | 0.6% | 0.8% |
| Sweden   | SE | Non-widening MS | 58.9% | 22.9% | 6.9% | 9.5%  | 1.8% | 5.7% | 2.8% | 6.3% | 1.2% | 0.9% |
| Slovenia | SI | Widening MS     | 22.8% | 30.2% | 4.5% | 38.6% | 3.9% | 0.5% | 0.9% | 1.0% | 1.2% | 0.5% |
| Slovakia | SK | Widening MS     | 28.9% | 32.1% | 6.2% | 23.0% | 9.8% | 0.2% | 0.3% | 0.4% | 0.2% | 0.4% |

|                             |              |              |             |              |             |              |              |              |              |              |
|-----------------------------|--------------|--------------|-------------|--------------|-------------|--------------|--------------|--------------|--------------|--------------|
| <b>Total EU-27</b>          | <b>33.7%</b> | <b>28.2%</b> | <b>3.6%</b> | <b>27.8%</b> | <b>6.8%</b> | <b>88.5%</b> | <b>93.6%</b> | <b>88.7%</b> | <b>92.0%</b> | <b>94.8%</b> |
| Widening MS                 | 31.9%        | 30.7%        | 4.8%        | 26.2%        | 6.3%        | 12.7%        | 15.4%        | 18.2%        | 13.1%        | 13.4%        |
| Non-widening MS             | 34.0%        | 27.8%        | 3.3%        | 28.1%        | 6.8%        | 75.8%        | 78.3%        | 70.5%        | 78.9%        | 81.4%        |
| Associated countries        | 46.7%        | 21.9%        | 4.4%        | 24.1%        | 3.0%        | 10.1%        | 6.0%         | 8.9%         | 6.5%         | 3.4%         |
| Third countries             | 40.1%        | 9.4%         | 7.2%        | 34.0%        | 9.3%        | 1.4%         | 0.4%         | 2.4%         | 1.5%         | 1.8%         |
| <b>Total Horizon Europe</b> | <b>34.7%</b> | <b>27.5%</b> | <b>3.7%</b> | <b>27.6%</b> | <b>6.5%</b> | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  |

Table 70: Participation in Horizon Europe by Pillar (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Horizon Europe participations in signed grants | Excellent Science | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|--------------------|--------------|-----------------|--|-------------------|---|-------------------|---|
|                    |              |                 |  | Participation     |   |                   |   |
| Austria            | AT           | Non-widening MS | 2 956  | 756               | 1 957   | 164               | 79  |
| Belgium            | BE           | Non-widening MS | 5 590  | 1 205             | 3 917   | 317               | 151   |
| Bulgaria           | BG           | Widening MS     | 634  | 95                | 417   | 72                | 50  |
| Cyprus             | CY           | Widening MS     | 888  | 135               | 631   | 27                | 95  |
| Czechia            | CZ           | Widening MS     | 1 366  | 424               | 718   | 76                | 148   |
| Germany            | DE           | Non-widening MS | 11 468   | 3 581             | 6 797   | 839               | 251   |
| Denmark            | DK           | Non-widening MS | 2 533  | 911               | 1 411   | 154               | 57  |
| Estonia            | EE           | Widening MS     | 678  | 89                | 442   | 74                | 73  |
| Greece             | EL           | Widening MS     | 4 553  | 516               | 3 649   | 151               | 237   |
| Spain              | ES           | Non-widening MS | 11 473   | 2 960             | 7 445   | 858               | 210   |

| EU-27 Member State          | Country code | Country group   | Horizon Europe participations in signed grants | Excellent Science | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|-----------------------------|--------------|-----------------|--|-------------------|---|-------------------|---|
|                             |              |                 |  | Participation     |   |                   |   |
| Finland                     | FI           | Non-widening MS | 2 468  | 599               | 1 626   | 191               | 52  |
| France                      | FR           | Non-widening MS | 9 380  | 3 090             | 5 345   | 767               | 178   |
| Croatia                     | HR           | Widening MS     | 562  | 84                | 345   | 39                | 94  |
| Hungary                     | HU           | Widening MS     | 792  | 164               | 517   | 66                | 45  |
| Ireland                     | IE           | Non-widening MS | 1 952  | 553               | 1 176   | 163               | 60  |
| Italy                       | IT           | Non-widening MS | 9 843  | 2 730             | 6 244   | 677               | 192   |
| Lithuania                   | LT           | Widening MS     | 537  | 55                | 368   | 57                | 57  |
| Luxembourg                  | LU           | Non-widening MS | 461  | 84                | 348   | 19                | 10  |
| Latvia                      | LV           | Widening MS     | 368  | 42                | 241   | 40                | 45  |
| Malta                       | MT           | Widening MS     | 202  | 42                | 92  | 25                | 43  |
| Netherlands                 | NL           | Non-widening MS | 6 425  | 2 006             | 3 743   | 534               | 142   |
| Poland                      | PL           | Widening MS     | 1 821  | 437               | 1 126   | 168               | 90  |
| Portugal                    | PT           | Widening MS     | 2 876  | 659               | 1 800   | 217               | 200   |
| Romania                     | RO           | Widening MS     | 1 098  | 138               | 816   | 66                | 78  |
| Sweden                      | SE           | Non-widening MS | 2 892  | 920               | 1 623   | 295               | 54  |
| Slovenia                    | SI           | Widening MS     | 1 110  | 200               | 753   | 73                | 84  |
| Slovakia                    | SK           | Widening MS     | 425  | 70                | 258   | 49                | 48  |
| <b>Total EU-27</b>          |              |                 | <b>85 351</b>                                  | <b>22 545</b>     | <b>53 805</b>   | <b>6 178</b>      | <b>2 823</b>  |
| Widening MS                 |              |                 | 17 910   | 3 150             | 12 173  | 1 200             | 1 387   |
| Non-widening MS             |              |                 | 67 441   | 19 395            | 41 632  | 4 978             | 1 436   |
| Associated countries        |              |                 | 10 200   | 3 030             | 6 060   | 584               | 526   |
| Third countries             |              |                 | 6 045  | 2 389             | 3 387   | 178               | 91  |
| <b>Total Horizon Europe</b> |              |                 | <b>101 596</b>                                 | <b>27 964</b>     | <b>63 252</b>   | <b>6 940</b>      | <b>3 440</b>  |

Table 71: Participation in Horizon Europe by Pillar (continued) (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Excellent Science                          | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area | Excellent Science                          | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|--------------------|--------------|-----------------|--|---|-------------------|---|--|---|-------------------|---|
|                    |              |                 | % participation in each Pillar, by country |   |                   |   | % participation in each Pillar, by country |   |                   |   |
| Austria            | AT           | Non-widening MS | 2.7%                                       | 3.1%  | 2.4%              | 2.3%  | 25.6%                                      | 66.2%   | 5.5%              | 2.7%  |
| Belgium            | BE           | Non-widening MS | 4.3%                                       | 6.2%  | 4.6%              | 4.4%  | 21.6%                                      | 70.1%   | 5.7%              | 2.7%  |
| Bulgaria           | BG           | Widening MS     | 0.3%                                       | 0.7%  | 1.0%              | 1.5%  | 15.0%                                      | 65.8%   | 11.4%             | 7.9%  |
| Cyprus             | CY           | Widening MS     | 0.5%                                       | 1.0%  | 0.4%              | 2.8%  | 15.2%                                      | 71.1%   | 3.0%              | 10.7%   |
| Czechia            | CZ           | Widening MS     | 1.5%                                       | 1.1%  | 1.1%              | 4.3%  | 31.0%                                      | 52.6%   | 5.6%              | 10.8%   |
| Germany            | DE           | Non-widening MS | 12.8%                                      | 10.7%   | 12.1%             | 7.3%  | 31.2%                                      | 59.3%   | 7.3%              | 2.2%  |
| Denmark            | DK           | Non-widening MS | 3.3%                                       | 2.2%  | 2.2%              | 1.7%  | 36.0%                                      | 55.7%   | 6.1%              | 2.3%  |
| Estonia            | EE           | Widening MS     | 0.3%                                       | 0.7%  | 1.1%              | 2.1%  | 13.1%                                      | 65.2%   | 10.9%             | 10.8%   |
| Greece             | EL           | Widening MS     | 1.8%                                       | 5.8%  | 2.2%              | 6.9%  | 11.3%                                      | 80.1%   | 3.3%              | 5.2%  |
| Spain              | ES           | Non-widening MS | 10.6%                                      | 11.8%   | 12.4%             | 6.1%  | 25.8%                                      | 64.9%   | 7.5%              | 1.8%  |
| Finland            | FI           | Non-widening MS | 2.1%                                       | 2.6%  | 2.8%              | 1.5%  | 24.3%                                      | 65.9%   | 7.7%              | 2.1%  |
| France             | FR           | Non-widening MS | 11.0%                                      | 8.5%  | 11.1%             | 5.2%  | 32.9%                                      | 57.0%   | 8.2%              | 1.9%  |
| Croatia            | HR           | Widening MS     | 0.3%                                       | 0.5%  | 0.6%              | 2.7%  | 14.9%                                      | 61.4%   | 6.9%              | 16.7%   |
| Hungary            | HU           | Widening MS     | 0.6%                                       | 0.8%  | 1.0%              | 1.3%  | 20.7%                                      | 65.3%   | 8.3%              | 5.7%  |
| Ireland            | IE           | Non-widening MS | 2.0%                                       | 1.9%  | 2.3%              | 1.7%  | 28.3%                                      | 60.2%   | 8.4%              | 3.1%  |
| Italy              | IT           | Non-widening MS | 9.8%                                       | 9.9%  | 9.8%              | 5.6%  | 27.7%                                      | 63.4%   | 6.9%              | 2.0%  |

| EU-27 Member State | Country code | Country group   | Excellent Science                          | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area | Excellent Science                          | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|--------------------|--------------|-----------------|--|---|-------------------|---|--|---|-------------------|---|
|                    |              |                 | % participation in each Pillar, by country |   |                   |   | % participation in each Pillar, by country |   |                   |   |
| Lithuania          | LT           | Widening MS     | 0.2%                                       | 0.6%  | 0.8%              | 1.7%  | 10.2%                                      | 68.5%   | 10.6%             | 10.6%   |
| Luxembourg         | LU           | Non-widening MS | 0.3%                                       | 0.6%  | 0.3%              | 0.3%  | 18.2%                                      | 75.5%   | 4.1%              | 2.2%  |
| Latvia             | LV           | Widening MS     | 0.2%                                       | 0.4%  | 0.6%              | 1.3%  | 11.4%                                      | 65.5%   | 10.9%             | 12.2%   |
| Malta              | MT           | Widening MS     | 0.2%                                       | 0.1%  | 0.4%              | 1.3%  | 20.8%                                      | 45.5%   | 12.4%             | 21.3%   |
| Netherlands        | NL           | Non-widening MS | 7.2%                                       | 5.9%  | 7.7%              | 4.1%  | 31.2%                                      | 58.3%   | 8.3%              | 2.2%  |
| Poland             | PL           | Widening MS     | 1.6%                                       | 1.8%  | 2.4%              | 2.6%  | 24.0%                                      | 61.8%   | 9.2%              | 4.9%  |
| Portugal           | PT           | Widening MS     | 2.4%                                       | 2.8%  | 3.1%              | 5.8%  | 22.9%                                      | 62.6%   | 7.5%              | 7.0%  |
| Romania            | RO           | Widening MS     | 0.5%                                       | 1.3%  | 1.0%              | 2.3%  | 12.6%                                      | 74.3%   | 6.0%              | 7.1%  |
| Sweden             | SE           | Non-widening MS | 3.3%                                       | 2.6%  | 4.3%              | 1.6%  | 31.8%                                      | 56.1%   | 10.2%             | 1.9%  |
| Slovenia           | SI           | Widening MS     | 0.7%                                       | 1.2%  | 1.1%              | 2.4%  | 18.0%                                      | 67.8%   | 6.6%              | 7.6%  |
| Slovakia           | SK           | Widening MS     | 0.3%                                       | 0.4%  | 0.7%              | 1.4%  | 16.5%                                      | 60.7%   | 11.5%             | 11.3%   |

|                             |              |              |              |              |              |              |             |             |
|-----------------------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|-------------|
| <b>Total EU-27</b>          | <b>80.6%</b> | <b>85.1%</b> | <b>89.0%</b> | <b>82.1%</b> | <b>26.4%</b> | <b>63.0%</b> | <b>7.2%</b> | <b>3.3%</b> |
| Widening MS                 | 11.3%        | 19.2%        | 17.3%        | 40.3%        | 17.6%        | 68.0%        | 6.7%        | 7.7%        |
| Non-widening MS             | 69.4%        | 65.8%        | 71.7%        | 41.7%        | 28.8%        | 61.7%        | 7.4%        | 2.1%        |
| Associated countries        | 10.8%        | 9.6%         | 8.4%         | 15.3%        | 29.7%        | 59.4%        | 5.7%        | 5.2%        |
| Third countries             | 8.5%         | 5.4%         | 2.6%         | 2.6%         | 39.5%        | 56.0%        | 2.9%        | 1.5%        |
| <b>Total Horizon Europe</b> | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  | <b>27.5%</b> | <b>62.3%</b> | <b>6.8%</b> | <b>3.4%</b> |

Table 72: Investment in Horizon Europe by Pillar (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Horizon Europe investments in signed grants (EUR million) | Excellent Science    | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|--------------------|--------------|-----------------|---|----------------------|---|-------------------|---|
|                    |              |                 |   | Investment by Pillar |   |                   |   |
| Austria            | AT           | Non-widening MS | 1 393   | 413                  | 857   | 102               | 21  |
| Belgium            | BE           | Non-widening MS | 3 354   | 551                  | 2 055   | 436               | 312   |
| Bulgaria           | BG           | Widening MS     | 165   | 6                    | 101   | 25                | 33  |
| Cyprus             | CY           | Widening MS     | 300   | 39                   | 208   | 7                 | 47  |
| Czechia            | CZ           | Widening MS     | 481   | 118                  | 239   | 35                | 90  |
| Germany            | DE           | Non-widening MS | 6 832   | 2 209                | 3 575   | 971               | 77  |
| Denmark            | DK           | Non-widening MS | 1 239   | 422                  | 678   | 121               | 18  |
| Estonia            | EE           | Widening MS     | 259   | 31                   | 141   | 33                | 55  |
| Greece             | EL           | Widening MS     | 1 689   | 140                  | 1 375   | 53                | 121   |
| Spain              | ES           | Non-widening MS | 4 563   | 943                  | 2 908   | 637               | 75  |
| Finland            | FI           | Non-widening MS | 1 228   | 272                  | 802   | 137               | 17  |
| France             | FR           | Non-widening MS | 4 897   | 1 417                | 2 798   | 635               | 47  |
| Croatia            | HR           | Widening MS     | 136   | 11                   | 80  | 9                 | 34  |
| Hungary            | HU           | Widening MS     | 199   | 42                   | 125   | 22                | 10  |
| Ireland            | IE           | Non-widening MS | 902   | 253                  | 517   | 120               | 13  |
| Italy              | IT           | Non-widening MS | 3 655   | 912                  | 2 387   | 307               | 49  |
| Lithuania          | LT           | Widening MS     | 157   | 13                   | 91  | 25                | 27  |
| Luxembourg         | LU           | Non-widening MS | 197   | 22                   | 161   | 13                | 1   |
| Latvia             | LV           | Widening MS     | 99  | 5                    | 58  | 8                 | 28  |
| Malta              | MT           | Widening MS     | 46  | 4                    | 23  | 8                 | 11  |
| Netherlands        | NL           | Non-widening MS | 3 793   | 1 258                | 1 976   | 511               | 48  |
| Poland             | PL           | Widening MS     | 670   | 132                  | 353   | 104               | 81  |



|          |    |                 |       |     |     |     |     |
|----------|----|-----------------|-------|-----|-----|-----|-----|
| Portugal | PT | Widening MS     | 998   | 186 | 587 | 93  | 131 |
| Romania  | RO | Widening MS     | 288   | 23  | 217 | 19  | 29  |
| Sweden   | SE | Non-widening MS | 1 445 | 465 | 756 | 209 | 15  |
| Slovenia | SI | Widening MS     | 358   | 65  | 227 | 26  | 41  |
| Slovakia | SK | Widening MS     | 109   | 10  | 57  | 15  | 27  |

|                             |               |               |               |              |              |
|-----------------------------|---------------|---------------|---------------|--------------|--------------|
| <b>Total EU-27</b>          | <b>39 451</b> | <b>9 963</b>  | <b>23 352</b> | <b>4 679</b> | <b>1 457</b> |
| Widening MS                 | 5 952         | 824           | 3 883         | 480          | 765          |
| Non-widening MS             | 33 498        | 9 139         | 19 469        | 4 199        | 692          |
| Associated countries        | 3 238         | 1 096         | 1 739         | 274          | 130          |
| Third countries             | 526           | 115           | 398           | 10           | 4            |
| <b>Total Horizon Europe</b> | <b>43 215</b> | <b>11 173</b> | <b>25 488</b> | <b>4 963</b> | <b>1 591</b> |

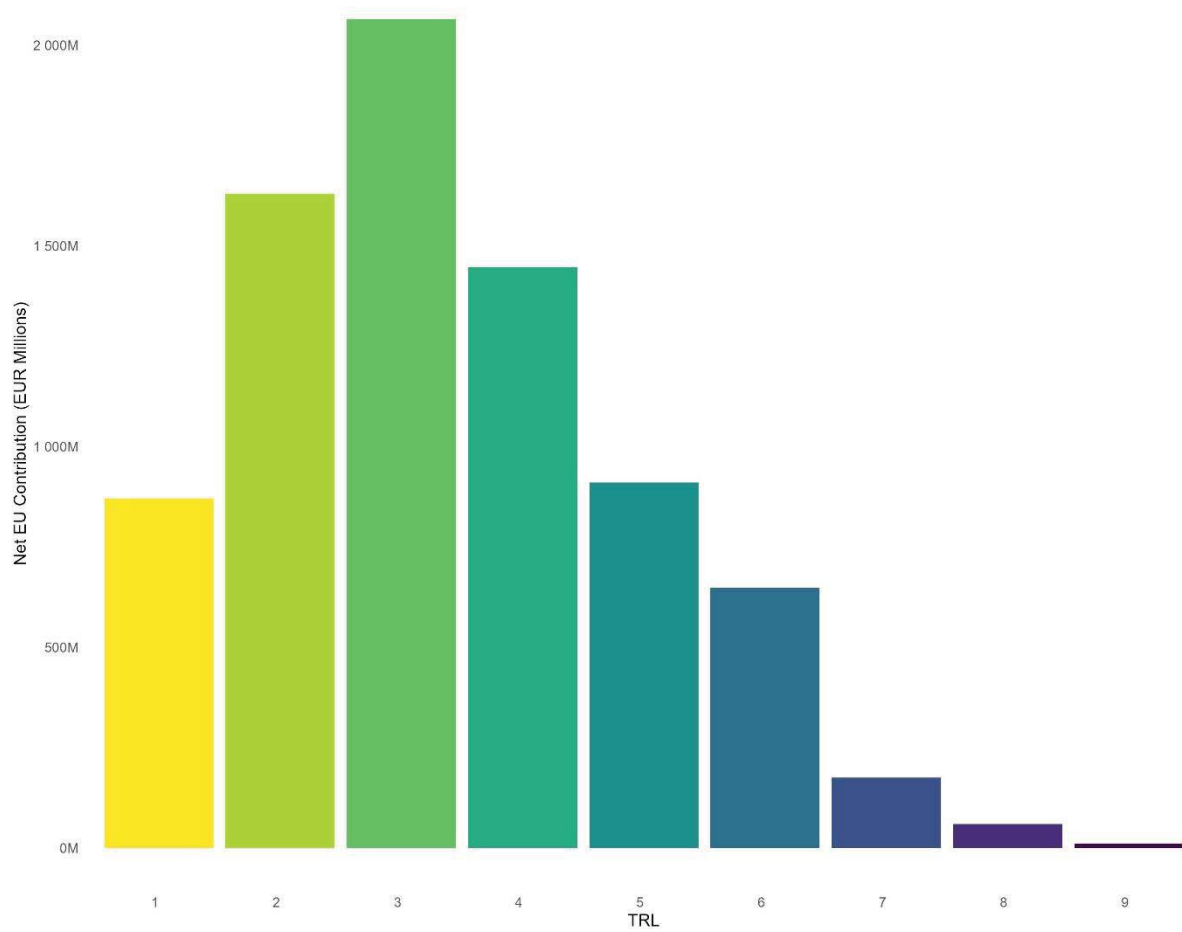
Table 73: Investment in Horizon Europe by Pillar (continued) (Source: CORDA data – cut-off date 6 January 2025).

| EU-27 Member State | Country code | Country group   | Excellent Science                       | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area | Excellent Science                       | Global Challenges and European Industrial Competitiveness | Innovative Europe | Widening Participation and Strengthening the European Research Area |
|--------------------|--------------|-----------------|---|---|-------------------|---|---|---|-------------------|---|
|                    |              |                 | % investment in each Pillar, by country |   |                   |   | % investment in each Pillar, by country |   |                   |   |
| Austria            | AT           | Non-widening MS | 29.7%                                   | 61.5%   | 7.3%              | 1.5%  | 3.7%                                    | 3.4%  | 2.1%              | 1.3%  |
| Belgium            | BE           | Non-widening MS | 16.4%                                   | 61.3%   | 13.0%             | 9.3%  | 4.9%                                    | 8.1%  | 8.8%              | 19.6%   |
| Bulgaria           | BG           | Widening MS     | 3.7%                                    | 61.1%   | 15.0%             | 20.1%   | 0.1%                                    | 0.4%  | 0.5%              | 2.1%  |
| Cyprus             | CY           | Widening MS     | 12.8%                                   | 69.3%   | 2.2%              | 15.7%   | 0.3%                                    | 0.8%  | 0.1%              | 3.0%  |
| Czechia            | CZ           | Widening MS     | 24.5%                                   | 49.6%   | 7.2%              | 18.6%   | 1.1%                                    | 0.9%  | 0.7%              | 5.6%  |
| Germany            | DE           | Non-widening MS | 32.3%                                   | 52.3%   | 14.2%             | 1.1%  | 19.8%                                   | 14.0%   | 19.6%             | 4.8%  |
| Denmark            | DK           | Non-widening MS | 34.1%                                   | 54.7%   | 9.7%              | 1.4%  | 3.8%                                    | 2.7%  | 2.4%              | 1.1%  |
| Estonia            | EE           | Widening MS     | 11.9%                                   | 54.3%   | 12.8%             | 21.0%   | 0.3%                                    | 0.6%  | 0.7%              | 3.4%  |

|             |    |                 |       |       |       |       |       |       |       |      |
|-------------|----|-----------------|-------|-------|-------|-------|-------|-------|-------|------|
| Greece      | EL | Widening MS     | 8.3%  | 81.4% | 3.1%  | 7.2%  | 1.3%  | 5.4%  | 1.1%  | 7.6% |
| Spain       | ES | Non-widening MS | 20.7% | 63.7% | 14.0% | 1.6%  | 8.4%  | 11.4% | 12.8% | 4.7% |
| Finland     | FI | Non-widening MS | 22.2% | 65.3% | 11.1% | 1.4%  | 2.4%  | 3.1%  | 2.8%  | 1.0% |
| France      | FR | Non-widening MS | 28.9% | 57.1% | 13.0% | 1.0%  | 12.7% | 11.0% | 12.8% | 2.9% |
| Croatia     | HR | Widening MS     | 8.5%  | 59.2% | 7.0%  | 25.3% | 0.1%  | 0.3%  | 0.2%  | 2.2% |
| Hungary     | HU | Widening MS     | 21.1% | 62.9% | 11.0% | 5.0%  | 0.4%  | 0.5%  | 0.4%  | 0.6% |
| Ireland     | IE | Non-widening MS | 28.0% | 57.2% | 13.3% | 1.4%  | 2.3%  | 2.0%  | 2.4%  | 0.8% |
| Italy       | IT | Non-widening MS | 24.9% | 65.3% | 8.4%  | 1.3%  | 8.2%  | 9.4%  | 6.2%  | 3.1% |
| Lithuania   | LT | Widening MS     | 8.6%  | 58.3% | 15.8% | 17.4% | 0.1%  | 0.4%  | 0.5%  | 1.7% |
| Luxembourg  | LU | Non-widening MS | 11.1% | 81.6% | 6.6%  | 0.6%  | 0.2%  | 0.6%  | 0.3%  | 0.1% |
| Latvia      | LV | Widening MS     | 5.1%  | 58.3% | 7.9%  | 28.7% | 0.0%  | 0.2%  | 0.2%  | 1.8% |
| Malta       | MT | Widening MS     | 7.7%  | 50.1% | 18.6% | 23.6% | 0.0%  | 0.1%  | 0.2%  | 0.7% |
| Netherlands | NL | Non-widening MS | 33.2% | 52.1% | 13.5% | 1.3%  | 11.3% | 7.8%  | 10.3% | 3.0% |
| Poland      | PL | Widening MS     | 19.7% | 52.8% | 15.5% | 12.1% | 1.2%  | 1.4%  | 2.1%  | 5.1% |
| Portugal    | PT | Widening MS     | 18.7% | 58.9% | 9.3%  | 13.1% | 1.7%  | 2.3%  | 1.9%  | 8.2% |
| Romania     | RO | Widening MS     | 7.9%  | 75.6% | 6.5%  | 10.1% | 0.2%  | 0.9%  | 0.4%  | 1.8% |
| Sweden      | SE | Non-widening MS | 32.2% | 52.3% | 14.5% | 1.0%  | 4.2%  | 3.0%  | 4.2%  | 0.9% |
| Slovenia    | SI | Widening MS     | 18.1% | 63.4% | 7.1%  | 11.4% | 0.6%  | 0.9%  | 0.5%  | 2.6% |
| Slovakia    | SK | Widening MS     | 8.8%  | 52.4% | 13.7% | 25.2% | 0.1%  | 0.2%  | 0.3%  | 1.7% |

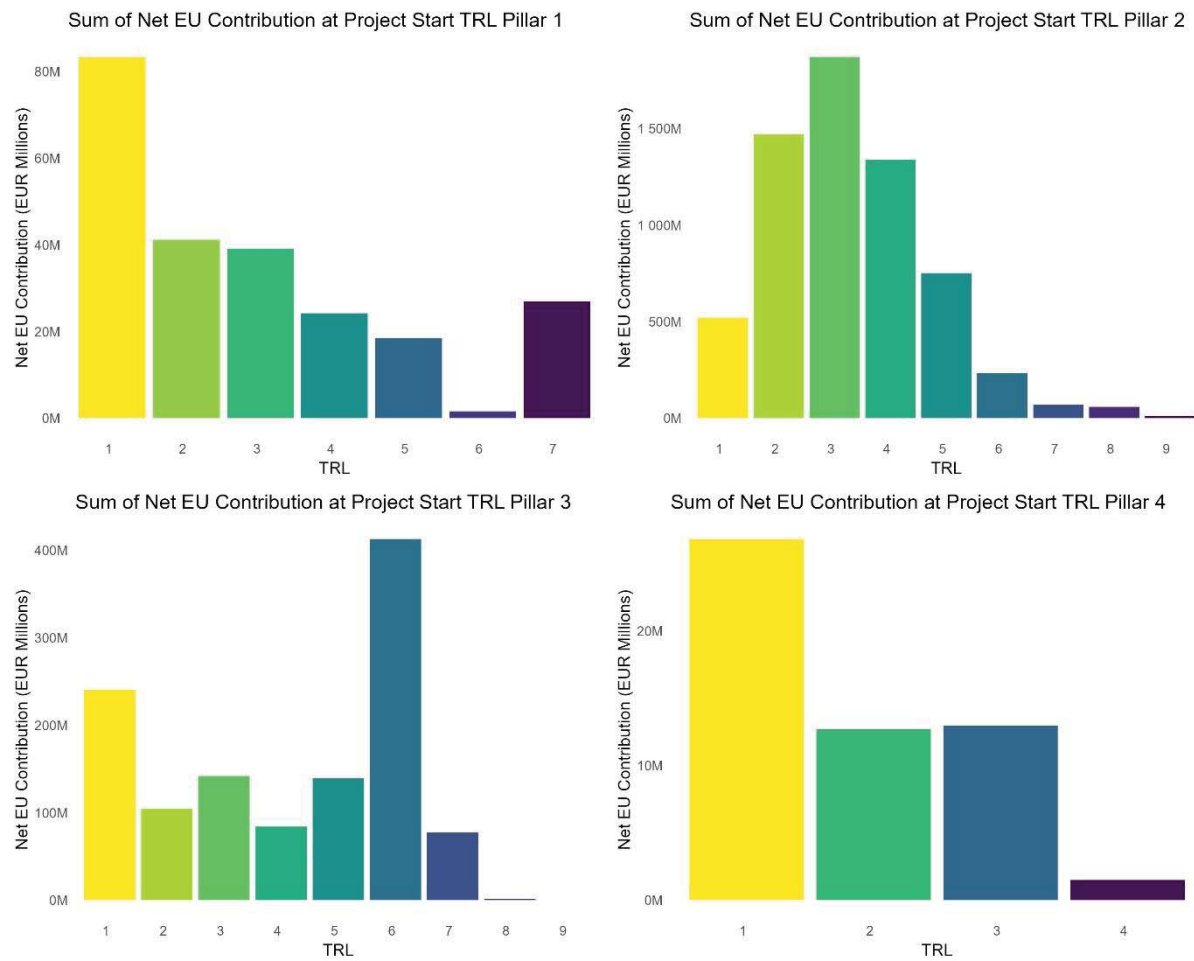
|                             |              |              |              |             |              |              |              |              |
|-----------------------------|--------------|--------------|--------------|-------------|--------------|--------------|--------------|--------------|
| <b>Total EU-27</b>          | <b>25.3%</b> | <b>59.2%</b> | <b>11.9%</b> | <b>3.7%</b> | <b>89.2%</b> | <b>91.6%</b> | <b>94.3%</b> | <b>91.6%</b> |
| Widening MS                 | 13.8%        | 65.2%        | 8.1%         | 12.9%       | 7.4%         | 15.2%        | 9.7%         | 48.1%        |
| Non-widening MS             | 27.3%        | 58.1%        | 12.5%        | 2.1%        | 81.8%        | 76.4%        | 84.6%        | 43.5%        |
| Associated countries        | 33.8%        | 53.7%        | 8.5%         | 4.0%        | 9.8%         | 6.8%         | 5.5%         | 8.2%         |
| Third countries             | 21.8%        | 75.6%        | 1.8%         | 0.7%        | 1.0%         | 1.6%         | 0.2%         | 0.2%         |
| <b>Total Horizon Europe</b> | <b>25.9%</b> | <b>59.0%</b> | <b>11.5%</b> | <b>3.7%</b> | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  | <b>100%</b>  |

Figure 127: Technology Readiness Level (TRL): status at project start, as indicated in the latest Periodic Reporting



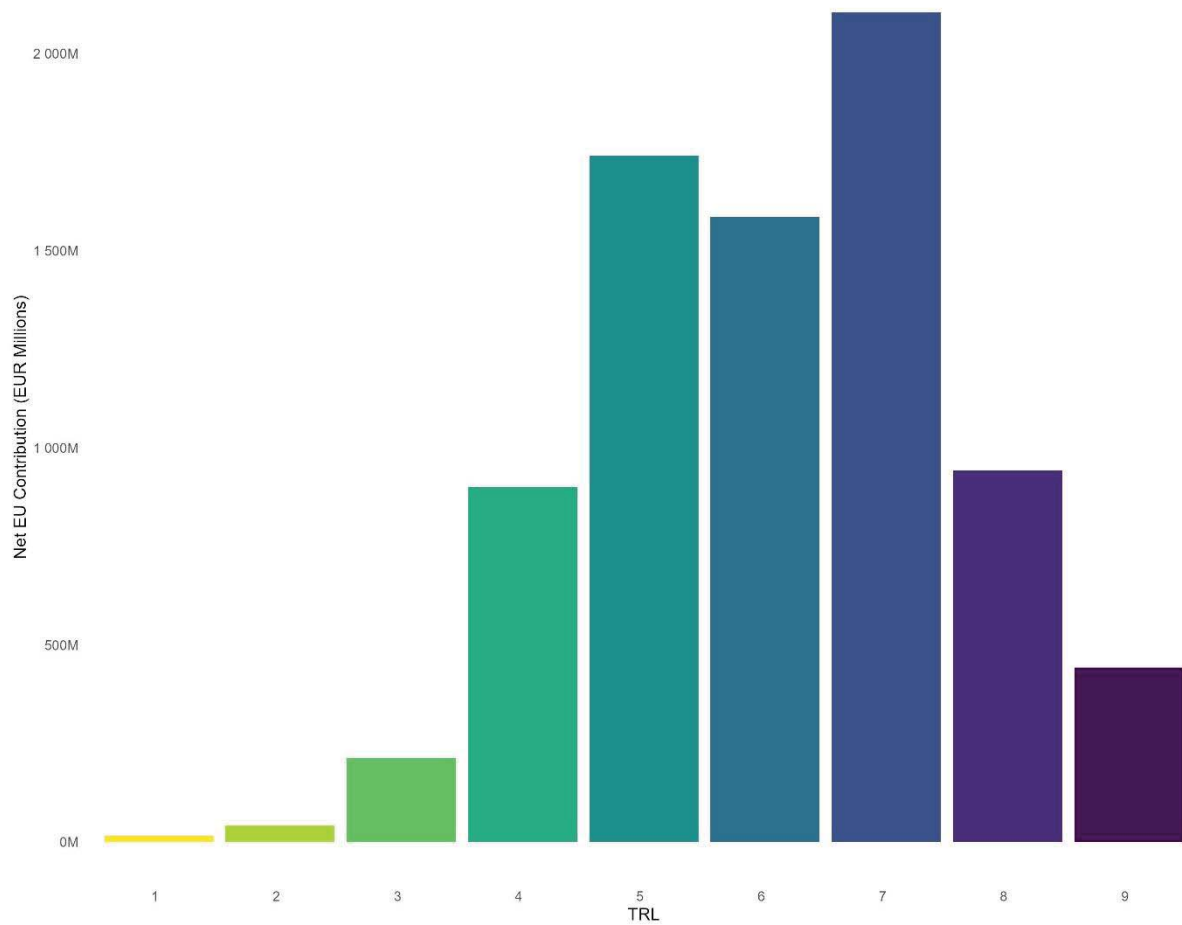
Source: Elaboration based on Dashboard and CORDA extractions, January 2025.

Figure 128: Technology Readiness Level (TRL): status at project start, by Pillar, as indicated in the latest Periodic Reporting



Source: Elaboration based on Dashboard and CORDA extractions, January 2025.

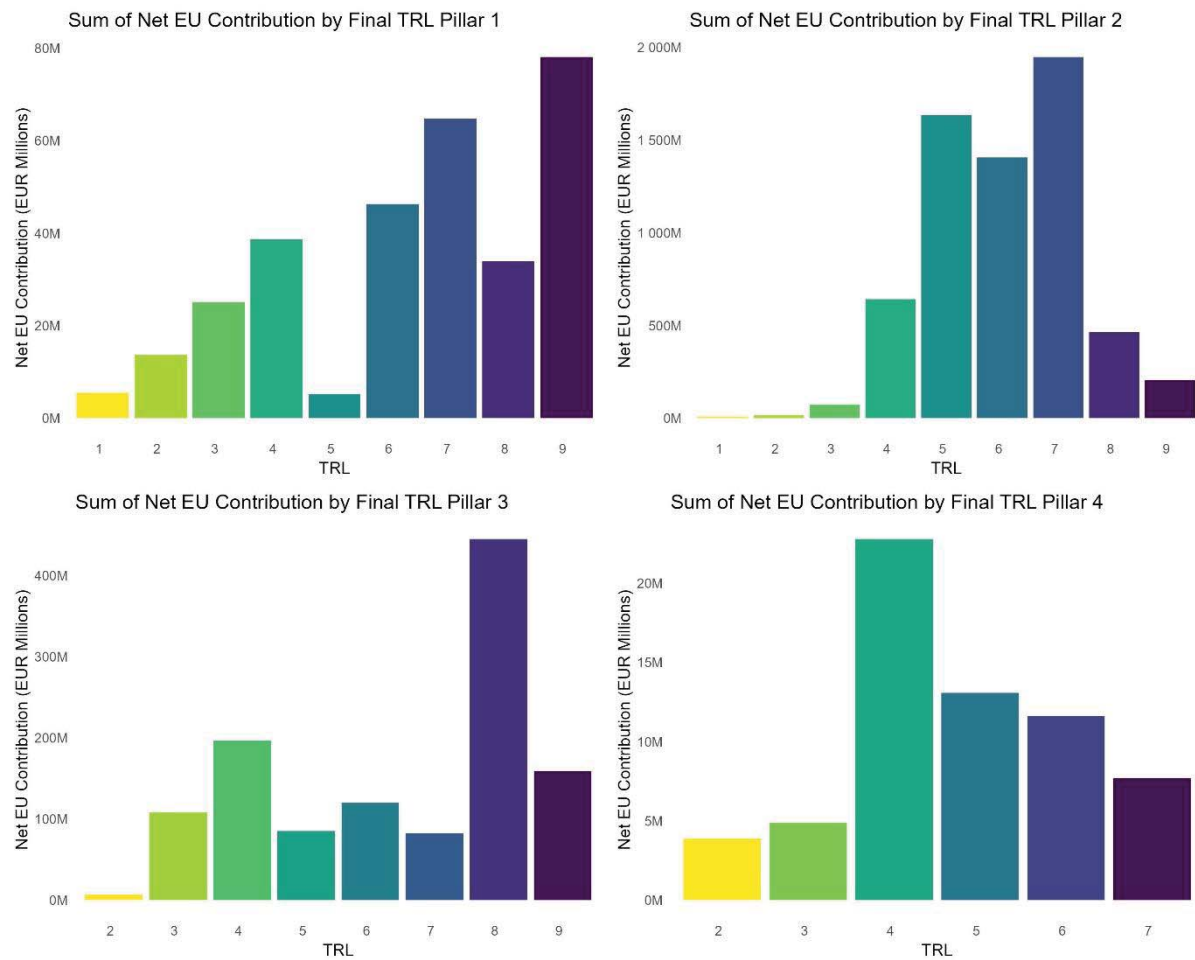
Figure 129: Technology Readiness Level (TRL): status at project end, as indicated in the latest Periodic Reporting<sup>326</sup>



Source: Elaboration based on Dashboard and CORDA extractions, January 2025.

<sup>326</sup> This can either be the achieved or expected TRL at project end. Ongoing projects might report the TRL that they aim to achieve by the end of the project.

Figure 130: Technology Readiness Level (TRL): status at project end, by Pillar, as indicated in the latest Periodic Reporting



Source: Elaboration based on Dashboard and CORDA extractions, January 2025.

## Annex 9 Activities conducted to increase citizen and user engagement

The evaluation found different activities conducted to increase citizen and user engagement:

- Cluster 1 engages end-users and SMEs in the health industry – but it has suboptimal synergies with Cluster 2 on social dimension (i.e. insufficient community engagement in health-related activities).
- Cluster 2 expanded its participant base by including more CSOs, practitioner groups (non-academic participants) and end users. A third of stakeholder consultation respondents also expressed that Cluster 2 has unexploited potential for complementarities with the other Clusters.
- Cluster 3 mandates the involvement of public bodies and security practitioners as a key eligibility criterion. The compulsory association of end-users to the project is considered to have had beneficial effect on the added-value of the programme and is a measure that contributes to dissemination of research results.
- Cluster 4 emphasizes the importance of involving local stakeholders with the aim to foster scalability and replicability.
- Cluster 5 projects in areas of energy supply, transport and mobility tend to prioritise collaborations across industries and value chains. As for citizen engagement, Destination 4 ('Efficient, sustainable and inclusive energy use') aims to make participatory urban planning a norm with a focus on awareness raising and uptake of technological solutions rather than their co-design or co-creation. Project results are not yet available.
- Cluster 6 is applying the Multi Actor Approach (MAA) to foster stakeholder participation: its WP 2021-2022 had 74 MAA topics (37%) and the WP 2023-2024 had 85 MAA topics (39%). Moreover, living labs and lighthouses are deployed through some Cluster 6 actions to ensure that end-users are involved in developing, experimenting and demonstrating innovations to address users' needs on the ground.
- According to the results of the Horizon Europe beneficiaries' survey, nearly half of the responding projects (47.7%; 2 537) plan to engage citizens in their R&I activities. For Cluster 5 and 6 Partnership projects, this proportion falls to one-third (N=190)<sup>327</sup>.
- As a contribution to Horizon Europe Strategic Plan 2025–2027, a citizen engagement event took place on 1 December 2022, in the context of the Conference on the Future of Europe. Citizens provided feedback under three topical areas: 'Digital and technological transition', 'Green transition' and 'Resilience'<sup>328</sup>.
- The feedback opportunity for 'main' Horizon Europe work programme 2025 took place between 15 April and 6 May 2024. It was based on strategic orientations for the work programme of all Horizon Europe clusters, Research Infrastructures, European Innovation Ecosystems, EU Missions and the NEB Facility. 2222 contributions from 1052 individual respondents were received<sup>329</sup>.
- EIC and EIT KICs promote citizen engagement through competitions and awards.

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<sup>327</sup> Engaging stakeholders in R&I for the Green Transition - Comparative analysis of Horizon Europe Cluster 5&6, Partnerships and Missions, section 3.4, <https://data.europa.eu/doi/10.2777/6499313>

<sup>328</sup> Results from the citizens' engagement event on Horizon Europe Strategic Plan 2025-2027, 2023, [https://research-and-innovation.ec.europa.eu/document/download/3455df69-b2f4-4f2f-9699-7afc6ed7d68b\\_en?filename=ec\\_rtd\\_citizen-engagement-event-summary.pdf](https://research-and-innovation.ec.europa.eu/document/download/3455df69-b2f4-4f2f-9699-7afc6ed7d68b_en?filename=ec_rtd_citizen-engagement-event-summary.pdf)

<sup>329</sup> [https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/horizon-europe-work-programmes\\_en#feedback-opportunity-for-the-2025-work-programme](https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/horizon-europe-work-programmes_en#feedback-opportunity-for-the-2025-work-programme)



- The EIC's Business Acceleration Services connect portfolio companies and researchers with corporates, investors, buyers, accelerators and venture builders amongst many others with a view to increasing the likelihood of market entry and scaling of EIC funded innovations.
- The EIT KICs disseminate R&I results in their community networks effectively, including among venture capital investors. In Horizon Europe, the EIT KICs report annually on dissemination activities and uptake of services.

## Annex 10 Horizon Europe response to emergencies

As stated in section 4.5.3 of the SWD, Programme parts across all Horizon Europe pillars responded to Covid, mpox and Ukraine emergencies:

- **Cluster 1 is the only cluster with an ‘emergency action fund’**, whose release can be triggered by a policy announcement (WHO’s global pandemic).<sup>330</sup> It mobilised resources and enhanced preparedness for health emergencies (e.g. COVID-19, Mpox, and previously Zika).
- **The first emergency call under Horizon Europe<sup>331</sup> provided EUR 123 million to tackle the virus and its variants.**<sup>332</sup> This support advanced our understanding of the virus by developing diagnostics, treatments, and vaccines, and informed public health policies. For instance, the project VERDI provided scientific evidence of vaccine effectiveness in children<sup>333</sup>, and CoVICIS helped to better understand the protective effect of vaccination in immunocompromised patients<sup>334</sup>. In addition, the project EuCARE provided insights into the severity of the different variants of SARS-CoV-2<sup>335</sup>. EuCARE also assessed the impact of prevention measures in schools showing that school opening did not increase transmission in Italy, Germany, and Portugal.<sup>336</sup>
- Horizon Europe contributes EUR 35 million on an annual basis to the cooperation between HERA and **Coalition for Epidemic Preparedness Innovations (CEPI)** to support the development of next generation vaccines for several diseases, including for COVID-19.<sup>337</sup>
- **The European COVID-19 Data Platform**, hosted by the European Open Science Cloud (EOSC), is a free-to-use, open digital space for researchers to share and upload data sets (for more details on EOSC, see also KIP3 in section 4.1.1 of this document). Since its launch on 20 April 2021, it has seen more than 114 000 users and 3.6 million web requests from over 170 countries. The platform offers access to 9 million records of sequences provided by 129 countries, as well as of biomolecular data and publications (contributing to over 1 million publications), viral sequences, sequences from patients, and other microbiological data.<sup>338</sup>
- In response to the **mpox outbreak in 2022, the EU mobilised EUR 17 million of emergency funding under Horizon Europe to support European clinical research.** These projects address research gaps in the current 2024 mpox outbreak and capitalise on the networks established during the COVID-19 pandemic to enhance Europe’s

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<sup>330</sup> The possibility for the mobilisation of emergency research funds is expressed as an “other action” integrated in the Horizon WP for Health since 2018: Horizon Europe 2021-2022 WP (p. 173): [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-4-health\\_horizon-2021-2022\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-4-health_horizon-2021-2022_en.pdf); and Horizon Europe 2023-2024 (p. 222): [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-4-health\\_horizon-2023-2024\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-4-health_horizon-2023-2024_en.pdf)

<sup>331</sup> Cluster 1 – funded under the ‘label’ of ‘HERA incubator’.

<sup>332</sup> [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_21\\_1548](https://ec.europa.eu/commission/presscorner/detail/en/ip_21_1548)

<sup>333</sup> [https://www.nejm.org/doi/10.1056/NEJMoa2205011?url\\_ver=Z39.88-2003&rft\\_id=ori:rid:crossref.org&rft\\_dat=cr\\_pub%20%20pubmed](https://www.nejm.org/doi/10.1056/NEJMoa2205011?url_ver=Z39.88-2003&rft_id=ori:rid:crossref.org&rft_dat=cr_pub%20%20pubmed)

<sup>334</sup> <https://jamanetwork.com/journals/jamaoncology/fullarticle/2790203>

<sup>335</sup> [https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762\(24\)00021-8/fulltext](https://www.thelancet.com/journals/lanepi/article/PIIS2666-7762(24)00021-8/fulltext)

<sup>336</sup> <https://www.sciencedirect.com/science/article/pii/S1201971223007634?via%3Dihub>

<sup>337</sup> [Speech by the President: Grand Challenges Annual Meeting](#)

<sup>338</sup> <https://www.covid19dataportal.org/>

preparedness and response.<sup>339</sup> For instance, the project MPX-RESPONSE is evaluating the safety and efficacy of therapies against mpox.<sup>340</sup>

- A benchmark study of the United States medical research agency (National Institutes of Health) response to COVID-19 reported that **Horizon Europe demonstrated flexibility in coping with changing circumstances in the world, such as COVID-19**, as the FP continues its funding efforts and directs initiatives towards COVID-19 and coronavirus research, including the preparations for the emerging variant.<sup>341</sup>
- **ERC identified 183 projects in COVID-19 related fields** such as diagnostics and treatments (including vaccines), medical devices, digital tools, AI, immunity, infection and pathology, and social and economic behaviour, wellbeing and crisis management.<sup>342</sup> Furthermore, 48% (109) of ERC beneficiaries, who responded to the evaluation survey in May-July 2023, ‘strongly agreed’ or ‘rather agreed’ that, compared with the research funding available at national and/or regional level, Horizon Europe provided greater flexibility to respond to pressing socio-economic needs.<sup>343</sup>
- With ‘**ERC for Ukraine**’, the ERC appealed to its grantees to provide temporary employment to researchers and support staff from Ukraine and seeking refuge in the EU, under the initiative ‘ERC for Ukraine’.
- The **MSCA** supported affected doctoral candidates and post-doctoral researchers from Ukraine by establishing in 2022 the EUR 25 million MSCA4Ukraine scheme.<sup>344</sup> The scheme enables displaced researchers from Ukraine to continue their work at academic and non-academic organisations in EU Member States and Horizon Europe associated countries, while maintaining their connections to research and innovation communities in Ukraine.<sup>345</sup> A EUR 10 million top-up was subsequently awarded in April 2024 to allow 50 additional researchers to continue their work safely in academia, businesses, research centres and public institutions based in the EU and countries associated to Horizon Europe. In total, 175 researchers from Ukraine had received a fellowship.
- In addition, **the EIC and EIT published dedicated calls to address COVID-19**.<sup>346</sup> The EIC also organised events to enable EIC companies to pitch to investors, corporates and public healthcare authorities looking for innovative solutions to COVID challenges.<sup>347</sup>
- At the end of 2023, the **EIT established an EIT Community Hub<sup>348</sup> in Kyiv**, working to bridge the Ukrainian and EU’s innovation ecosystem and boost ideas and businesses emerging from Ukraine.<sup>349</sup> Under Horizon Europe, the **EIT Jumpstarter** added a new activity<sup>350</sup> in 2023, entitled “rebuild Ukraine” – only for Ukrainian citizens and teams, allowing Ukrainian innovators to bring their ideas to the market. In 2024, 20% of total

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<sup>339</sup> [https://research-and-innovation.ec.europa.eu/research-area/health/mpox-research-and-innovation\\_en](https://research-and-innovation.ec.europa.eu/research-area/health/mpox-research-and-innovation_en)

<sup>340</sup> <https://www.nature.com/articles/s41591-023-02393-6>

<sup>341</sup> Resilient Europe evaluation study, Annex 5, benchmark study 1, p. 21, <https://data.europa.eu/doi/10.2777/22355>

<sup>342</sup> European Research Council, COVID-19 Frontier research in the spotlight, 2022, [https://erc.europa.eu/sites/default/files/2022-08/COVID19-Frontier\\_research\\_in\\_the-spotlight.pdf](https://erc.europa.eu/sites/default/files/2022-08/COVID19-Frontier_research_in_the-spotlight.pdf)

<sup>343</sup> Excellent Science evaluation study, 2024, Annex 4, p. 843, <https://data.europa.eu/doi/10.2777/9552959>

<sup>344</sup> Ibid, pp. 843-844, <https://data.europa.eu/doi/10.2777/9552959>

<sup>345</sup> Excellent Science evaluation study, 2024, p. 72, <https://data.europa.eu/doi/10.2777/2295765>

<sup>346</sup> Innovative Europe evaluation study, 2024, chapter 9.1, p. 98, <https://data.europa.eu/doi/10.2777/499132>

<sup>347</sup> Deep Tech Europe. EIC Impact Report, 2021, p. 50, <https://data.europa.eu/doi/10.2826/005280>

<sup>348</sup> Innovative Europe evaluation study, 2024, chapter 4.1, pp. 40-41, <https://data.europa.eu/doi/10.2777/499132>

<sup>349</sup> <https://eit-ris.eu/ukraine/>

<sup>350</sup> Innovative Europe evaluation study, 2024, Annex 10, p. 544, <https://data.europa.eu/doi/10.2777/726675>

applications within the EIT Jumpstarter came from Ukraine. The overall EIT support has so far channelled to Ukraine more than EUR 2 million between 2022 and 2023.

- In 2023, 41 Ukrainian partners (of which 29 higher education institutions) are participating in the EIT HEI initiative for strengthening their innovation capacity and establishing connections with European counterparts.
- Close to 900 Ukrainian girls in secondary school were trained on digital and entrepreneurial skills related to circular economy through the Girls Go Circular initiative.<sup>351</sup>
- **Human capital strengthening:** the '*Scientists Help Scientists*' initiative allocated additional funds to aid displaced Ukrainian researchers under the Human Frontier Science Program (HFPSO).<sup>352</sup>

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<sup>351</sup> DG EAC monitoring data, <https://eit-ris.eu/ukraine/>

<sup>352</sup> [HFSP Scientists for Scientists \(S4S\) Initiative | Human Frontier Science Program](#)