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NOTE

From:	General Secretariat of the Council
To:	Delegations
Subject:	European Research Area and Innovation Committee (ERAC) plenary meeting, 12-13 June 2025, Gdansk Capitalising on excellence and overcoming the innovation divide – challenges and opportunities for the next MFF cycle

Delegations will find in annex a discussion note (with three Annexes) on "Capitalising on excellence and overcoming the innovation divide - Strategic debate on challenges and opportunities for the next MFF cycle" in view of the plenary meeting of the European Research Area and Innovation Committee (ERAC) on 12-13 June 2025 in Gdansk.

Capitalising on excellence and overcoming the innovation divide

Strategic debate on challenges and opportunities for the next MFF cycle

Discussion note

Background

In follow-up to the ERAC Opinion on the next Framework Programme for R&I (adopted at the ERAC of June 2024), which recommends "*further elaborating on the issue of capitalising on excellence*", the topic "Capitalising on Excellence and Overcoming the Innovation Divide – Challenges and Opportunities for the Next MFF Cycle" is tabled for the agenda of this ERAC meeting. This approach aims to foster a more evidence-based discussion. At the time the ERAC opinion was written, much of the data and analysis on Horizon Europe and Member State participation was under preparation for the interim evaluation and not yet available.

In the Annex of the opinion, ERAC suggests pathways for further analysis to substantiate discussions about capitalising on excellence. Here, the opinion urges the collection, analysis, and interpretation of data on various aspects related to the implementation of the 'Widening Participation and Spreading Excellence' programme, including: submission levels, national investments in R&I, openness of networks, NCP structures, the Hop-on Facility, and geographical diversity.

To enhance the discussion, the European Commission has provided two documents containing data and analyses to answer the main questions raised by ERAC:

- Data on Framework Programme participation with a focus on Widening Member State participation;
- Additional analysis on participation of newcomers, the Hop-on Facility, participation in collaborative projects, seal of excellence, transfer of funds and COST.

Furthermore, delegates have been requested to provide their input on some remaining issues that require national data and assessments. Based on this input, an additional document has been drafted, with an overview table and summary analysis of the additional national input received from ERAC delegates.

Together, these documents form the basis for the follow-up discussion in ERAC and have been added as background documents to this discussion paper.

Main Insights

Generally, the data show progress in the participation and collaboration between Member States across Europe in comparison to previous programmes. However, substantial differences between countries persist, not only between Widening countries and other Member States, but also among the Widening countries. Success rates among Member States are generally converging, with the notable exceptions of the European Research Council (ERC) and European Innovation Council (EIC) programmes. Higher participation rates are closely linked to an increased number of proposal submissions — a success factor clearly observed in several Widening Member States.

Some common challenges in raising submission levels identified by ERAC delegations include capacity limitations, low awareness of opportunities, fragmentated support, limited access to networks, weak consortia-building experience, saturation, and perceived complexity. Multiple countries have installed national support schemes to improve submission levels and success rates, for instance through financial incentives for proposal preparation, co-funding of projects, and travel and coordination grants. Furthermore, countries offer proposal support services and training, awareness raising and use of Widening instruments strategically for capacity development and to gain experience.

National Contact Points (NCPs) play a key role in raising submission levels and supporting higher quality applications. It can be concluded from the input of the ERAC delegations that countries have organised their NCP support systems quite differently: from well-resourced and/or centralised NCP systems, to mixed or decentralised systems, or even lean or volunteer-based systems.

Widening countries have significantly improved their financial returns from the Framework Programme. Collectively, they now receive a higher EU contribution relative to their GDP compared to the group on non-Widening Member States.

Horizon Europe also continues to attract a substantial number of newcomers — organisations not previously funded under Horizon 2020. Notably, 52.4% of newcomers are from Widening Member States, compared to 48.6% from non-Widening countries, although there is considerable variation between individual Widening countries.

The share of collaborative projects involving Widening countries has grown substantially since the previous Framework Programme (FP7), now averaging around 80%. While larger EU Member States still play a leading role in steering consortia and setting research agendas, Widening countries are increasingly active participants and show a growing ability to initiate collaborations independently.

The Hop-on Facility is primarily attracting applicants who have already participated in Horizon Europe collaborative projects, with only few newcomers making use of this mechanism. Participation appears concentrated in a small number of countries, and there are emerging patterns of repeated participation by the same organisations.

The 'Seal of Excellence' (SoE) supports synergies between EU and national funding programmes. More than 40 national or regional support schemes — including those under the European Regional Development Fund (ERDF) — have now been implemented across most Member States. Malta and Lithuania, in particular, have used ERDF transfers to finance participation in Horizon Europe. Several ERAC delegations expressed their interest in transferring funds in the future, or mentioned ongoing preparations to arrange this. Particularly ERAC delegations from Widening countries indicated active and strategic use of the SoE and mention it as an important instrument, since it provides an opportunity co-finance excellent projects evaluated in an international context. The SoE does not seem to be very actively used outside this group of countries.

To a large extent, the results of the participation of different Member States in Horizon Europe reflect the R&D capacity of their systems, which still vary largely in terms of investments and overall excellence.

On many occasions and as highlighted in the latest edition of the European Semester, national R&I systems still require stronger investment commitments and structural reforms to improve the allocation of funding, build stronger science-business linkages or more effective innovation framework conditions and public support programmes to boost private R&D investments. Without tackling these weaknesses to boost excellence, the impact of any measures to capitalise on pockets of excellence will be limited to accelerate addressing the persistent innovation divide in Europe.

Capitalising on excellence: making efforts count

The context of this debate takes place at a time when the contours and specifics of the next MFF and a future EU Research and Innovation (R&I) programme are still under preparation. The central challenge however remains how we can ensure that the actions we take — both at the national level, collaboration between Member States, and at the EU level — are effectively aligned and interlinked in order to better capitalise upon the existing excellence in the EU and effectively grow its potential. Furthermore, the challenge lies in determining how to safeguard and implement the necessary conditions across the different levels, with a view to the next MFF cycle.

You are invited to reflect on the following questions in two rounds of interventions. For the first round, you are invited to give an intervention of maximum 2 minutes elaborating on the most pressing challenge from your perspective and how this relates to the data and analyses presented. In the second round, you are invited to shortly reflect on the most suitable way forward for this discussion, in an intervention of maximum 1 minute.

Round 1: How can national and institutional reforms of R&I systems be better linked with the intervention of the Framework Programme? (2 min)

Guiding questions:

- *From your perspective and based on the data presented: What is the **single most** relevant challenge or topic (e.g. networks, support, investments, reforms) to be addressed in order to better capitalise on excellence across the EU (you can only choose one)? What was your main take-away from the background data presented, concerning this topic?*
- *What would be the main point of intervention at national level and on EU level for this specific challenge, and how could this challenge benefit from collaboration among Member States?*
  - *For example, on national level interventions, delegations can reflect on stronger R&I investments and reforms as a priority to expand the excellence base.*
  - *For example, on EU level interventions, delegations can reflect on how this might be reflected in the Framework Programme (e.g. stronger conditionality, stronger support measures for reforms).*

Round 2: Future perspectives (1 min)

Guiding questions:

- *Which type of follow-up to today's discussion would you propose?*
- *What should be the role of ERAC in this regard?*

Input to the ERAC strategic debate on

'Capitalising on excellence and overcoming the innovation divide – challenges and opportunities for the next MFF cycle'

(June 2025 plenary)

In June 2024, ERAC adopted an Opinion on Guidance for the next Framework Programme for R&I, prepared by an ad-hoc task force that undertook extensive discussions between Member States, EEA EFTA states and the European Commission. In section 2.4 of the document (and the corresponding Annex), dedicated to the topic of 'capitalising on Europe's full potential for excellence', there is an acknowledgment that conclusions on the participation on the Widening programme were insufficient, and that further analysis was needed, considering that there should be more elements where consensus could be reached.

In the Annex, ERAC recommends **collecting, analysing and interpreting information addressing several topics related to the implementation of the 'Widening participation and spreading excellence' programme**, including: level of submissions, levels of national investments for R&I in widening countries, opening networks, NCP networks, Hop-on Facility and geographical diversity.

The Commission contributes to this debate with updated statistics on the participation of Member States in Horizon Europe, success rates and participation patterns across the different programme parts, details on the Widening actions, trends since Framework Programme 7, and country specific information (Annex 1). In addition, specific analytics have been compiled in this document on

- the participation of newcomers from widening countries in the programme;
- participation patterns under the hop-on facility;
- collaborative projects and the participation of widening Member States;
- Seal of Excellence, transfer of funds from ERDF to Horizon Europe;
- COST

The data will be provided to set a baseline for an evidence-based discussion.

Participating of newcomers in Horizon Europe

Horizon Europe attracts newcomers, in particular from the widening Member States.

Horizon Europe attracts a substantial number of newcomers (organisations that have not been funded under Horizon 2020). The share of newcomers from widening Member States is with 52,4% higher than the share for the non-widening Member States (48,6%). They also represent a higher share of the EU contribution allocated (table 1). The differences among the widening Member States are substantial, as documented in table 2

Country group	Share of newcomers among participants	Share of EU contribution allocated to newcomers
Widening Member States	52.4	15.7
Non-widening Member States	48.6	10.1

Figure 1: Horizon Europe: share of newcomers and allocation of EU contribution

Country	Share of newcomers among participants	Share of EU contribution allocated to newcomers
Bulgaria	54.4	32.4
Croatia	54.9	41.7
Cyprus	50.9	12.5
Czechia	54.3	12.9
Estonia	61.6	23.7
Greece	53.1	11.7
Hungary	45.6	15.4
Latvia	44.4	13.4
Lithuania	58.7	27.0
Malta	55.4	34.2
Poland	48.2	12.4
Portugal	53.6	14.1
Romania	54.9	23.5
Slovakia	52.5	22.3
Slovenia	47.0	13.6

Figure 2: Horizon Europe: share of newcomers and allocation of EU contribution for widening Member States

Hop-On Facility Horizon Europe

The hop-on facility is attracting mainly applicants that have already participated in collaborative projects under Horizon Europe, and only very few newcomers. Participation shows concentration on few countries, and emerging patterns of multiple participations of the same entities.

The Hop-on scheme was designed to enable an additional partner to join an on-going collaborative project under Pillar 2 or the EIC pathfinder instrument that does not have any partner from a widening country.

So far 3 annual calls have been implemented (2022-2024), resulting in the selection of 230 successful proposals. The success rate of the eligible proposals is 100%. The analysis of the legal entities from widening countries that have been selected reveals interesting facts:

- A small number of countries is using the scheme extensively, Portugal with 67 participations (25%), followed by Czechia, Greece and Poland with more than 20 participations (figure 3);
- Most beneficiaries are already experienced under Horizon Europe, with 75% participating more than 5 times (figure 3). Only 12 of the participants (7%) are newcomers to Horizon Europe;
- A sample of 77 organisations with 5-20 participations under Horizon Europe shows that the prior participations occur mostly (69%) in the programme parts targeted by the hop-on facility;
- Some individual entities make extensive use of the scheme: on R&I performer is participating 15 times, 5 participate more than 5 times. Less than half of all hop-on are individual participations under the scheme (figure 5).

Under the 2024 call, it was observed for the first time that proposals were submitted where the collaborative project had not yet started, therefore at initiative from the coordinator of the collaborative project. Moreover, it was recently observed that successful coordinators put forward a budget transfer request (from the budget reserved for the Widening partner) after the Hop-on amendment has been signed.

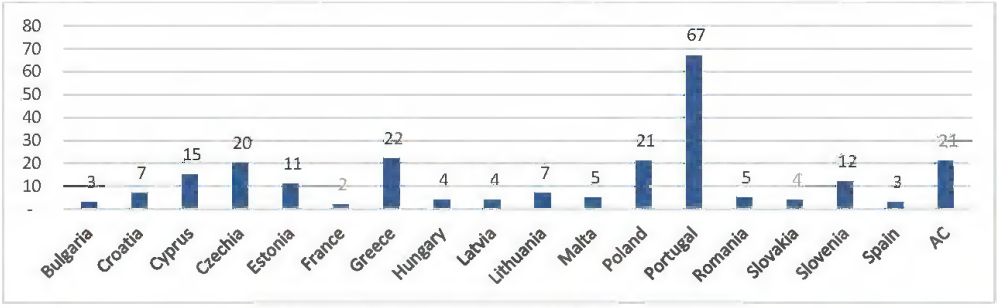

Figure 3: Country participation in the hop-on scheme

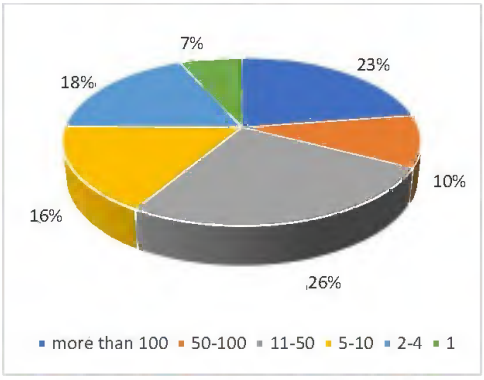

Figure 4: Number of Horizon Europe participations of hop-on beneficiaries

Number of legal entities	Frequency of Hop-on participations
105	1
20	2
3	3
8	4
1	5
2	6
1	7
1	8
1	15

Figure 5: Frequency of participation of beneficiaries in the hop-on scheme

Collaborative projects and the participation of widening Member States

The share of collaborative projects involving widening countries has increased significantly since FP7 and reaches now on average 80%.

Major EU member states maintain a central role in steering consortia and setting research agendas, yes, there is a clear evolving participation of Widening countries, and lower dependence on non-Widening countries to initiate collaborations.

For collaborative projects there the question was raised if networks being perceived as 'closed clubs' would be reflected in the data available. Recent analytics show that the situation has significantly improved since Framework Programme 7. Figure 6 shows the share of collaborative projects that include partners from widening countries. It makes a distinction between the 50 legal entities with the highest number of coordinating roles, and the remaining coordinators. Under FP7 less than 50% of the projects coordinated by top-50 coordinators involved partners from widening countries, and only slightly more for the others. This figure is approaching at 80% for all coordinators under Horizon Europe.

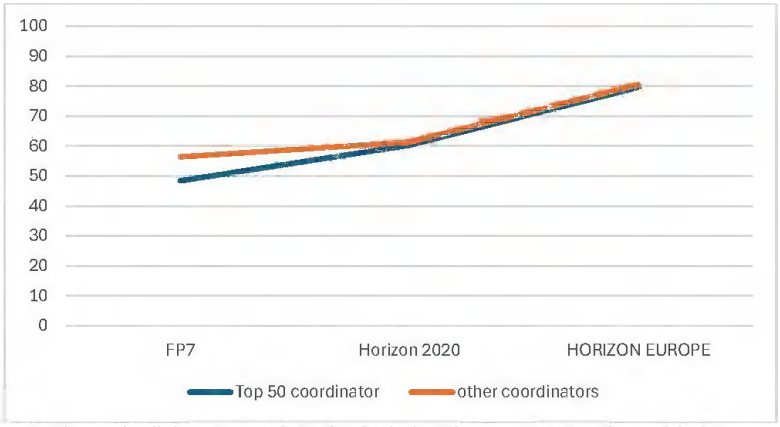

Figure 6: Share of collaborative projects that include at least one partner from widening countries, from Framework Programme 7 to Horizon Europe

A **dynamic network analysis on the integration and role of Widening countries** within the collaborative networks established by the European Union's Framework Programmes reveals the central role of major EU member states countries in steering consortia and setting research agendas, while also highlighting the evolving participation of Widening countries. These countries show an increasing trend in collaboration shares, indicative of the EU's policies' impact on fostering inclusivity. However, challenges remain for some Southeast European countries, with variations in participation levels and collaboration dynamics. The study also underscores the significance of shorter path lengths and the presence of 'bridge' countries in facilitating efficient knowledge exchange and enhancing the connectivity of Widening countries within the broader R&I network. The study finds that there are few influential organisations (network hubs) within Widening countries group. Following the Covid-19 pandemic, countries are more inclined to cooperate with others that are in close proximity and have similar strategic interests or socio-economic conditions. This also implies that Widening Member States may not depend as heavily on Non-Widening Member Stats to initiate collaborations.

Seal of Excellence, transfer of funds from ERDF to Horizon Europe

The Seal of Excellence facilitates synergies between funding programmes at EU and national level, with more than 40 national and/or regional Seal support schemes, including ERDF programmes, having been set up in most Member States.

The transfer of funds from ERDF to Horizon Europe has been used by Malta and Lithuania.

The Seal of Excellence

The Seal of Excellence (SoE), firstly introduced in Horizon 2020, is awarded to project proposals submitted under Horizon Europe call which are evaluated above the quality thresholds (therefore considered excellent projects) but not funded due to lack of budget available for that call for proposals. The Seal of Excellence facilitates the build-up of synergies between funding programmes at EU and national level, including potential alternative funding. It allows funding bodies to benefit from an independent and international evaluation process which has already taken place.

Supporting the Seal of Excellence is a voluntary choice for each Member State. It is a simple yet effective mechanism, which benefits funding bodies, host countries, regions, institutions as well as talented researchers and innovators. In Horizon Europe, the Seal of Excellence is awarded to European Innovation Council (EIC) Accelerator and Transition projects; Marie Skłodowska-Curie Actions Postdoctoral Fellowships and COFUND; Teaming actions under Widening; Horizon Europe Mission on Adaptation to Climate Change and European Research Council Proof of Concept. Seal of Excellence is also planned in the EIC Pre-accelerator call under the widening component the Work Programme 2025. Figure 7 shows the number of Seals of excellence awarded by Member State and type of action.

While there is no legal obligation for Member States and beneficiaries to report back on the use of the Seal of Excellence, some evidence has been collected on voluntary basis through the Seal of Excellence Community of Practice, a forum that includes national/regional managing authorities and other funding bodies. 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. Some examples are listed below:

- Spain allocated EUR 50 million in its recovery and resilience plan (RRP) to 30 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.
- 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

The transfer of funds from ERDF to Horizon Europe

Malta has been the first Member State to make use of the possibility, foreseen in the 2021-2027 programming period, to transfer funds from the European Regional Development Fund (ERDF) to Horizon Europe. Malta decided to transfer EUR 5 million from its ERDF allocation to Horizon Europe. The transfer happens in instalments of EUR 1 million per year for a period of 5 years. Implementation of the transfer started in 2023 and the first grants were signed in February 2024. In total, in the first two years of implementation of such transfer, six ERA fellowships and one MSCA global fellowship projects with Maltese beneficiaries have been funded thanks to the transferred resources, and are currently ongoing.

In the case of Lithuania, EUR 18,5 million were transferred from the ERDF to HE (2024-2025) to support projects under Pillar 1, Pillar 3 and 4. The process of transfer involved three ministries with the lead taken on by the Ministry of Finance. Currently, there are 8 projects in Pillar 3 (grants) and ERA Fellowships with all funds intended for the 2024 well absorbed. It is estimated that the transfer of funds contributed to a 15% increase in incentives to participate in HE projects – a direct contribution to strengthening Lithuanian R&I system.

Member State	EIC Accelerator 2021-2024	EIC Transition 2021-2024	MSCA PF 2021-2023	MSCA COFUND 2021-2023	ERC PoC 2023-2024	Mission Climate change (2022-2023)	Teaming WIDERA
Austria	45	2	137	1	21	0	NA
Belgium	38	0	231	1	38	2	NA
Bulgaria	6	0	2	0	0	0	2
Croatia	1	0	7	1	2	0	1
Cyprus	0	0	18	1	3	0	0
Czechia	7	0	86	1	5	0	5
Denmark	77	7	279	3	22	0	NA
Estonia	15	1	11	1	2	1	2
Finland	62	2	102	1	14	0	NA
France	182	9	596	13	57	0	NA
Germany	183	12	518	0	118	0	NA
Greece	4	2	46	0	7	7	3
Hungary	8	0	17	0	2	1	1
Ireland	56	5	120	4	13	0	NA
Italy	81	10	658	2	64	1	NA
Latvia	2	0	3	0	0	0	2
Lithuania	8	0	8	0	2	0	0
Luxembourg	9	0	26	0	5	0	NA
Malta	0	0	4	1	0	0	0
Netherlands	136	7	344	2	61	0	NA
Poland	22	0	20	2	4	0	2
Portugal	19	2	115	0	16	0	4
Romania	3	2	6	0	0	0	0
Slovakia	3	1	4	1	1	0	0
Slovenia	4	0	36	2	5	0	3
Spain	145	7	738	11	77	4	NA
Sweden	125	4	214	5	21	0	NA
Total	**1241**	**73**	**4346**	**53**	**560**	**16**	**25**

Figure 7: Seal of excellence awarded by Member State and type of action

COST

COST actions allow researchers and innovators to collaborate for four years in topics of their choice. These networking activities demonstrate potential for researchers to engage in follow-up projects, inside and outside the Framework Programme.

COST Actions are often seen as "stepping stones" to other projects financed under the subsequent EU Framework Programmes. A survey carried out by COST among researchers from widening countries that participated in COST Actions, which ended in recent years, asked 715 individual researchers in leadership positions from widening countries (including associated countries) who were active in 285 Actions whether their involvement in COST actions had a spin-off project in Horizon 2020 or Horizon Europe, and outside the Framework Programme. The overall response rate was 32%.

- About a third of respondents reported to participate in a Horizon 2020 or Horizon Europe project, and see this a result of their involvement in a COST Action. A similar number reports this also for other programmes (response data for Widening Member States in figure 9);
- 11% of the respondents indicated that they are or have been Principal Investigator in at least one of these projects;
- Among projects mentioned, for 68 it was possible to identify them in the CORDIS data base, showing a strong participation in pillar II (figure 8).

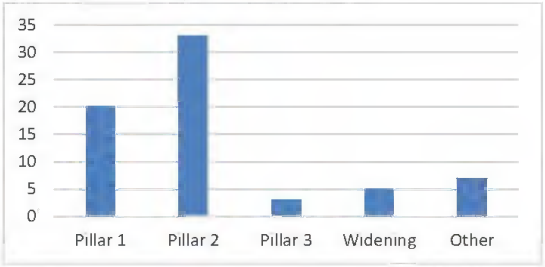

Figure 9: COST Survey results among researchers based in Widening Member States: involvement in project per programme part

Country	Researchers surveyed	Responses	Response rate	Respondents with FP follow-up
Bulgaria	15	4	27%	1
Croatia	41	19	46%	8
Cyprus	20	2	10%	2
Czech Republic	47	8	17%	4
Estonia	20	5	25%	2
Greece	67	22	33%	10
Hungary	40	11	28%	5
Latvia	11	3	27%	1
Lithuania	15	7	47%	1
Malta	15	4	27%	2
Poland	57	11	19%	4
Portugal	132	47	36%	14
Romania	34	10	29%	2
Slovakia	9	2	22%	1
Slovenia	49	13	27%	5

Figure 9: COST Survey results among researchers based in Widening Member States and their involvement in follow-up projects under the Framework Programme

European Commission

Research and Innovation

Data on Framework Programme participation

Widening actions and country specific data

Table of contents

The document uses publicly available data from Eurostat and extracted from the external Horizon Europe dashboard (24 January 2025).

1 Participation of widening countries in Horizon Europe

1.1 Submissions and success rates

Success rates are generally converging well, except under the ERC and EIC

The average success rates of applications from widening and non-widening Member States under Horizon Europe are converging (18,6% vs. 19,6%), with eight of the widening Member States being above the average. The programme parts that show the strongest difference in average success rates is the ERC (6,8% vs. 15,0%), followed by the EIC (7,9% vs. 14,2%).

More successful participation depends on increasing the number of proposal submissions, as demonstrated by several widening Member States

There are significant differences in the number of proposals submitted per researcher, with an important number of widening Member States having low submission across the different programme parts, and in particular under the ERC and EIC. Other widening Member States perform well, both in terms of submissions and success rates, even in these two programme parts. The share of submission from widening Member States across the programme is on average 26% of all Member State submissions. It is substantially higher, with 30%, in the second pillar, and lowest in the ERC (13%) and EIC accelerator (16%).

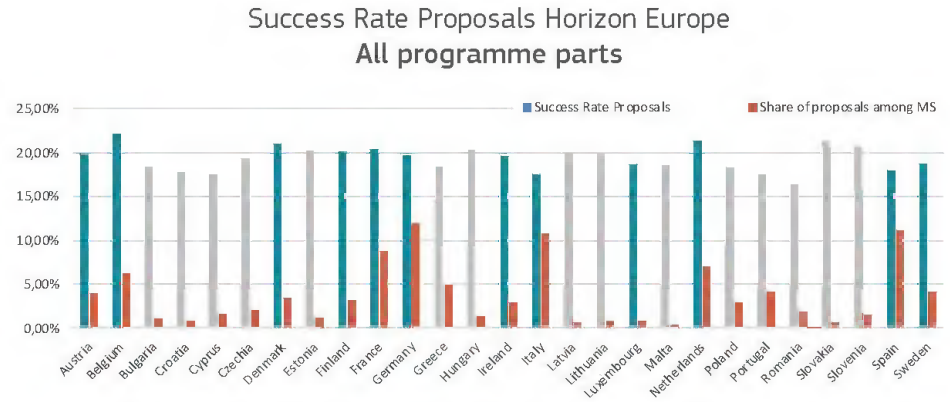

Figure 1: *Success rate and share of proposals submitted per Member State (grey: widening MS)*

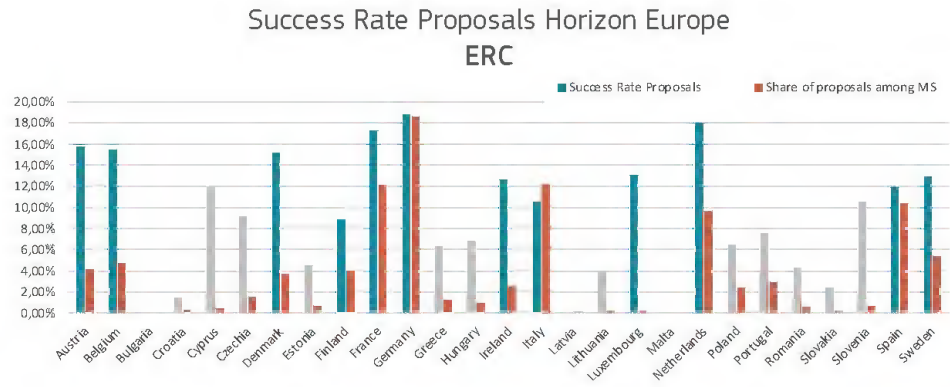

Figure 2: *ERC - Success rate and share of proposals submitted per Member State (grey: widening MS)*

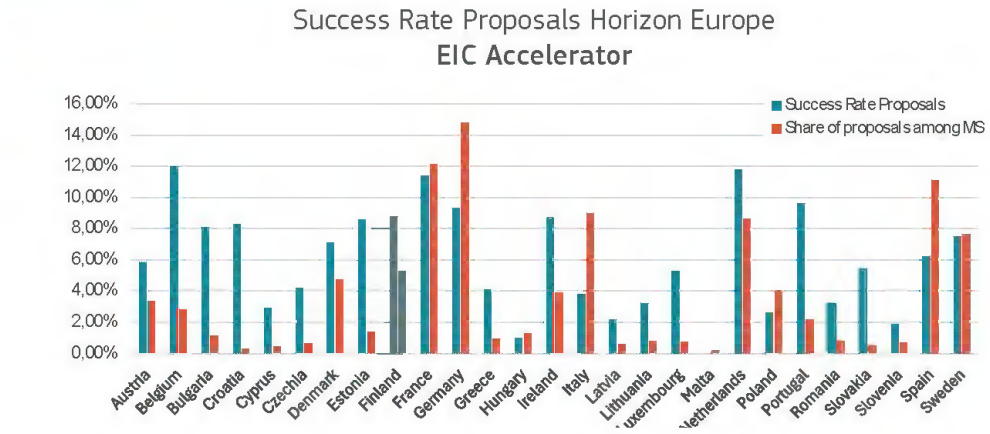

Figure 3: *EIC Accelerator - Success rate and share of proposals submitted per Member State (grey: widening MS)*

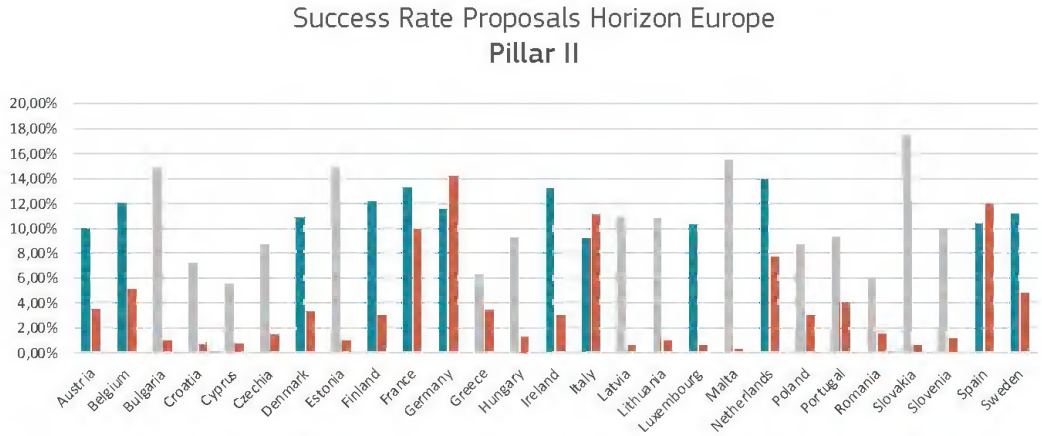

Figure 4: *Figure 4: Pillar II - Success rate and share of proposals submitted per Member State (grey: widening MS)*

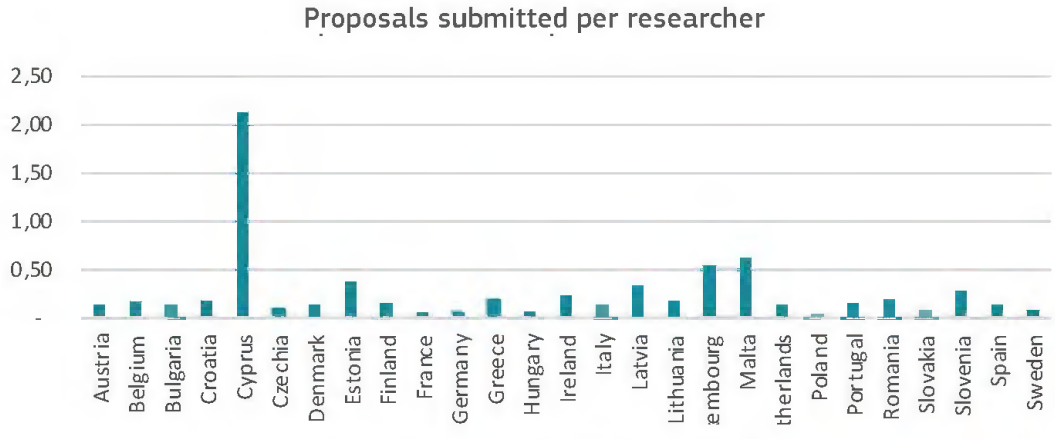

Figure 5: *Number or proposals submitted per researcher*

1.2 Funding per Member State

Widening Member States have increased their financial returns from the Framework Programme and are receiving collectively a higher EU contribution per GDP than the other Member States.

In 2023 the GDP share of widening Member States amounted to 14,8% of the EU's GDP. Their financial return from the Framework Programme increased steadily from FP7 (10,2%) to Horizon Europe (15,2%).

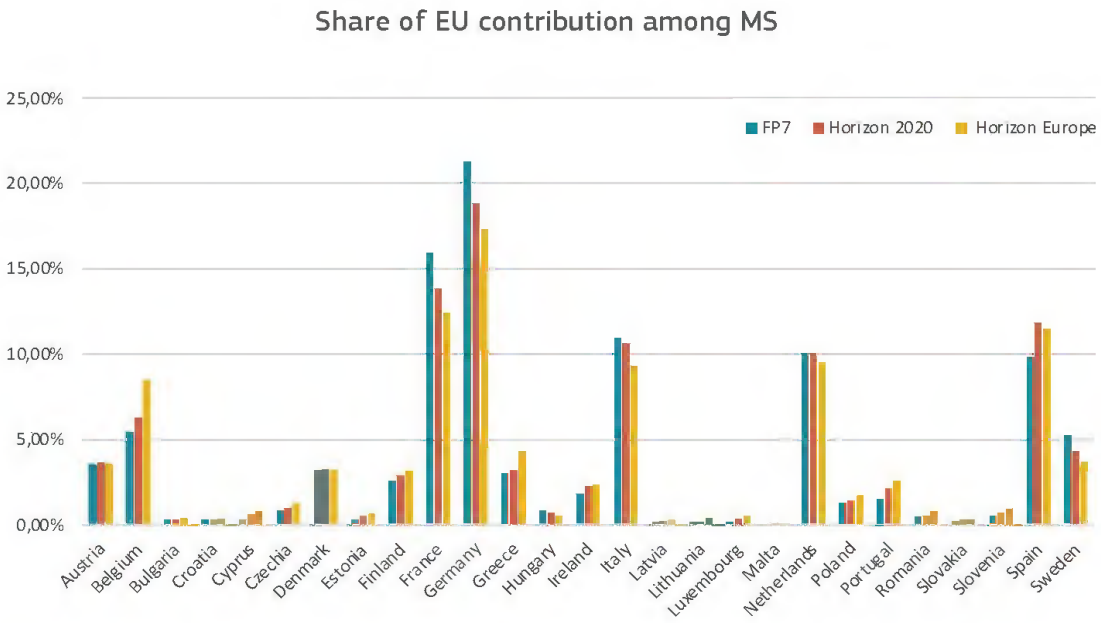

Figure 6: *Member State share of funding from the Framework Programme [EU 27]*

		FP7	Horizon 2020	Horizon Europe
HEU Widening Member States	**Share of participation among EU27**	16,6%	17,6%	21,0%
	Share of Union contribution among EU27	10,2%	12,0%	15,2%
HEU non-widening Member States	**Share of participation among EU27**	83,4%	82,4%	79,0%
	Share of Union contribution among EU27	89,8%	88,0%	84,8%

Table 1: *Member State share of funding from the Framework Programme [EU 27]*

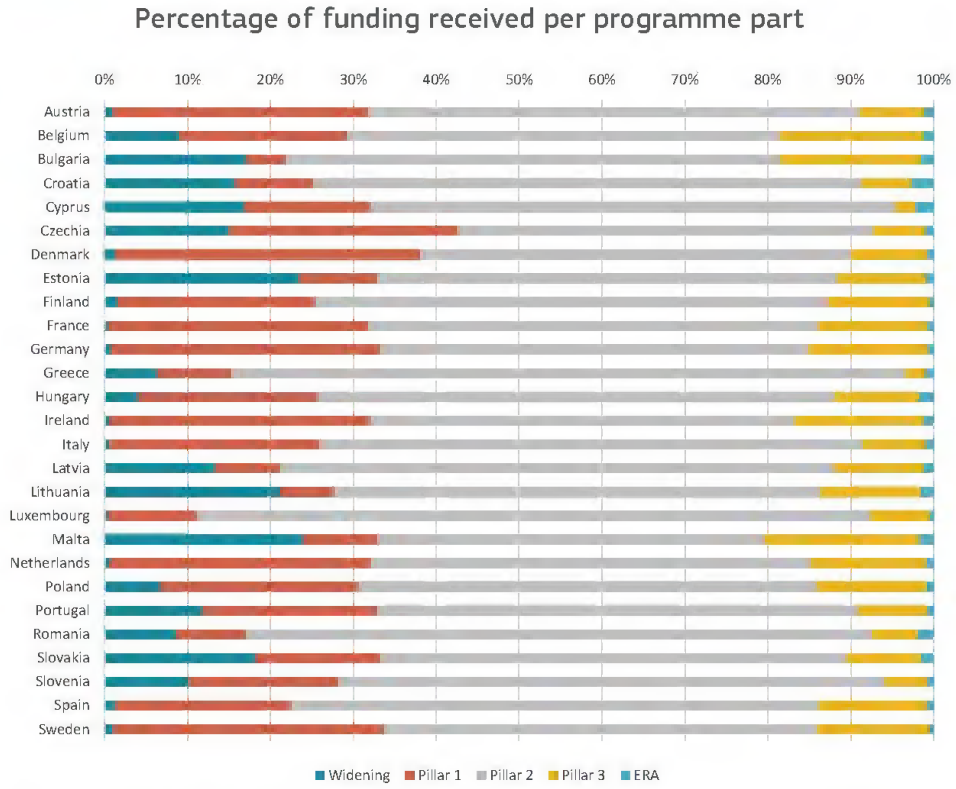

Figure 7: *Funding received per programme part under Horizon Europe [percentage of total funding received]*

Figure 8: *Member State share of funding received from Horizon Europe, normalised by share of GDP among EU 27*

6

2 Widening actions under Horizon Europe actions

2.1 Portfolio of actions

Teaming consists in the development of new the modernisation of existing centres of excellence, together with advanced partner institutions. National complementary funding is required from the outset upon presentation of the proposal. The typical budget is 15 million union contribution, and at least equal amounts of complementary funding. The geographical balance has significantly improved over the years and now almost all current widening Member States have at least one Teaming centre (with the exceptions of MT and RO).

Twinning aims at enhancing activities between research institutions of widening countries and top-class leading counterparts at EU level. Twinning is by far the most popular action of the entire widening programme due to its high success and participation rate. All widening Member States coordinate Twinning projects.

ERA Chairs are focused on bringing excellence to institutions. This action supports universities or research organisations from widening countries to recruit an outstanding researcher, to establish a research team to significantly improve the research performance in a scientific domain of choice. All widening Member States coordinate ERA Chairs projects.

Excellence Hubs (new under Horizon Europe) was introduced for the first time in the Work Programme 2021-22 as an innovation-oriented initiative for excellence. It supports the development and cooperation of placed-based innovation ecosystems in widening countries and beyond, based on the quadruple helix model: research institutions, business, local/regional governments and societal actors.

European Excellence Initiative (new under Horizon Europe) aims at the transformation of the higher education sector and its close ecosystems, including non-university research centres. It addresses alliances of universities, including European University Alliances, and supports the consolidation of institutional reform in ERA priorities.

Hop-on (new under Horizon Europe) scheme enables an additional partner to join the on-going collaborative project under Pillar 2 or the EIC pathfinder instrument that does not have any partner from a widening country.

ERA Fellowships is a Marie Skłodowska-Curie actions (MSCA) to support individual researchers of any nationality, in widening countries. All widening Member States except Bulgaria have at least one ERA Fellowship grant.

ERA Talents aims to boost interoperability of careers and employability of research and innovation talents across sectors, complementing ERA Chairs with intersectoral mobility.

EIC Pre-accelerator (new under Horizon Europe in 2025) aims to enhance the innovation, business, and investment readiness of deep-tech startups in widening countries, helping them progress from TRL 4 to TRL 5/6 and secure funding for scaling up, with the goal of increasing their competitiveness and attracting private or public investments.

Connected regional innovation valleys in widening countries (new under Horizon Europe in 2025) seeks to implement co-funded action plans for establishing interconnected regional innovation valleys across Europe, enhancing synergies between regions with varying innovation capacities to foster collaboration and scale up deep-tech innovation.

European Cooperation in Science and Technology (COST) actions are interdisciplinary research networks that bring researchers together (from academia, SMEs, public institutions, and other relevant organisations) to investigate a topic of their choice for your years.

Support for R&I policy making in the EU enlargement countries (new under Horizon Europe in 2025) foster the further integration of the enlargement countries into the European Research Area and into the European Innovation Area and strengthens their potential for successful participation in regional and multilateral research and innovation activities.

Dissemination and Exploitation Support Facility helps beneficiaries of widening actions to improve the effectiveness of their dissemination and exploitation and unlock new sources of funding. Improving knowledge diffusion, technology uptake and having spill-over effects is fundamental to ensure that researchers and their institutions build on and valorise the latest available knowledge.

Pathways to Synergies provides support for setting up the interfaces between two different funding systems, where barriers still occur due to the mismatches of regional versus European approaches. The main goal is to move formerly single beneficiaries of regional funding programmes out of isolation via cross-border collaboration and prepare them for participation in Horizon Europe calls.

National Contact Points (NCP) Widera network convenes a large consortium of all relevant National Contact Points in widening countries and beyond. The project implements an ambitious service package, including proposal pre-checks by external experts, coaching for applicants and matchmaking.

2.2 Overall participation by action

HE Actions	Number of projects	Total requested budget (Million EUR)	Number of participant countries	Number of Widening countries	*Number of Calls*	Success rate (EU Contribution)
Teaming	27	917	27	14	2	42%*
Twinning	202	1717	41	26	2	17%
Twinning Western Balkans	17	170	23	10	1	14%
ERA Chairs	71	574	26	19	2	31%
Excellence Hubs	24	1451	31	21	2	35%
European Excellence Initiative	21	282	53	22	2	25%
Hop On	139	71	34	20	2	93%
ERA Fellowships	185	41	33	20	3	73%
ERA Talents	9	68	27	17	1	35%
Dissemination & Exploitation	1	39	13	10	1	15%
Synergies	16	39	30	17	1	49%
TOTAL	**713**	**5375**	**62**	**28**	**11**	**22%**

**related to stage 2 amongst all proposals passing through phase 1*

Table 2: *Overall Participation by action in Horizon Europe (excluding COST)*

2.3 Geographical distribution of widening funding under Horizon Europe

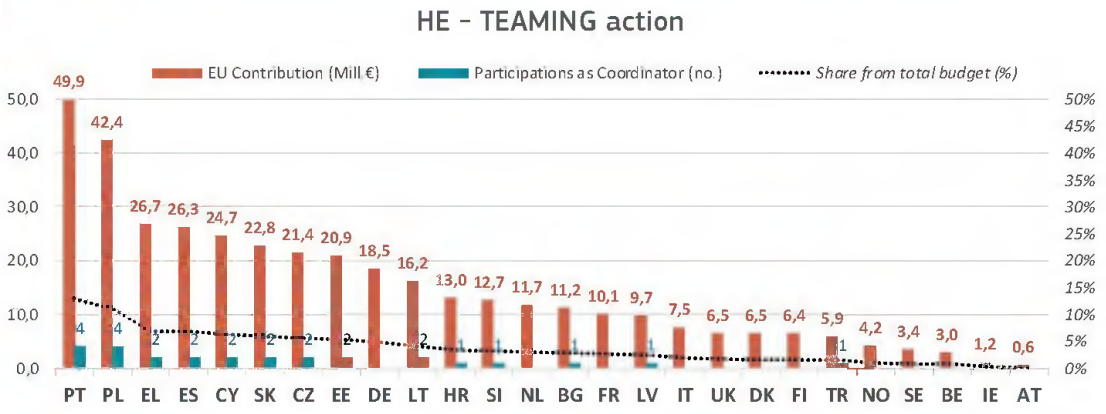

Figure 9: *Horizon Europe Teaming action, by country*

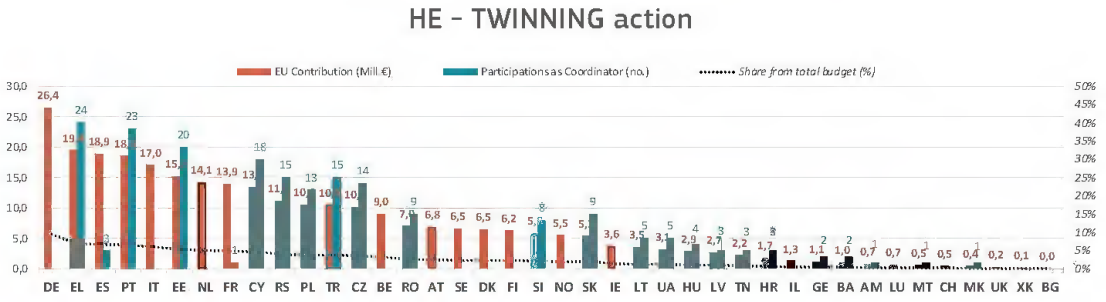

Figure 10: *Horizon Europe Twinning action, by country (without the dedicated Western Balkan call)*

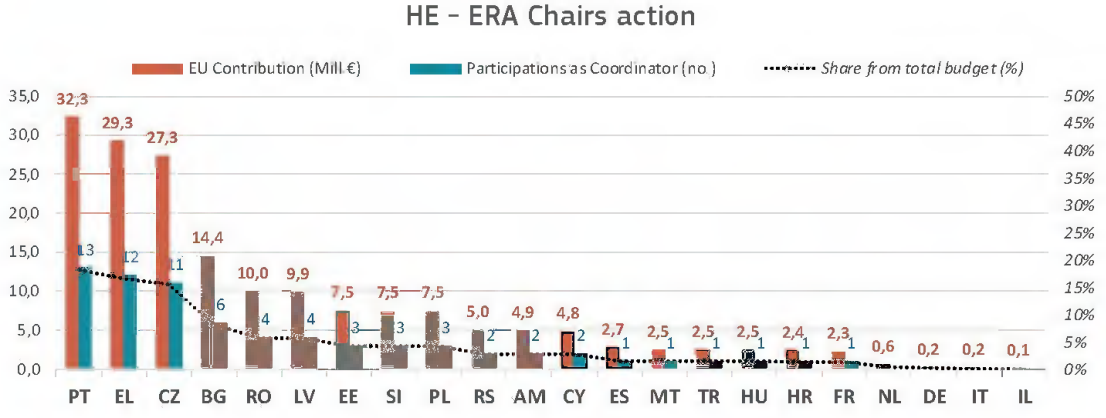

Figure 11: *Horizon Europe ERA Chairs action, by country*

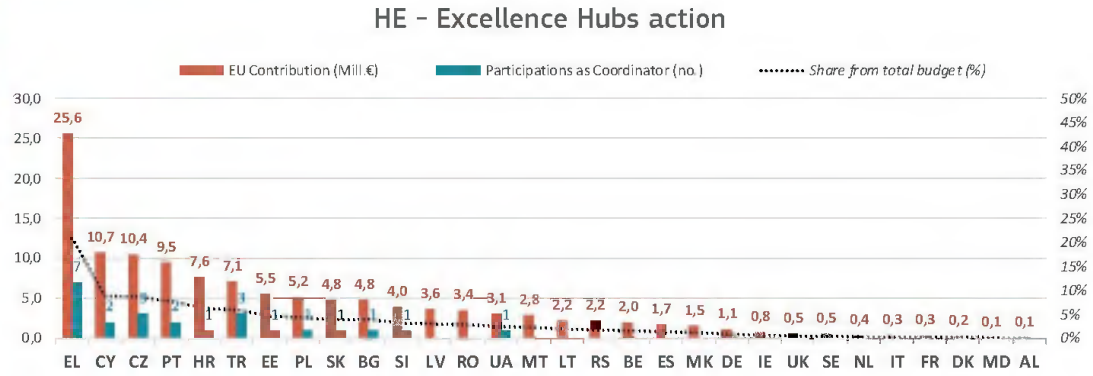

Figure 12: *Horizon Europe Excellence Hubs action, by country*

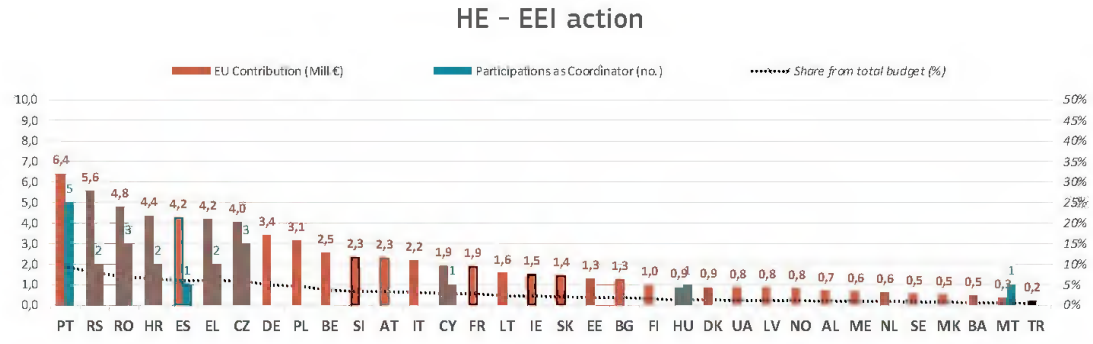

Figure 13: *Horizon Europe Excellence Initiatives action, by country*

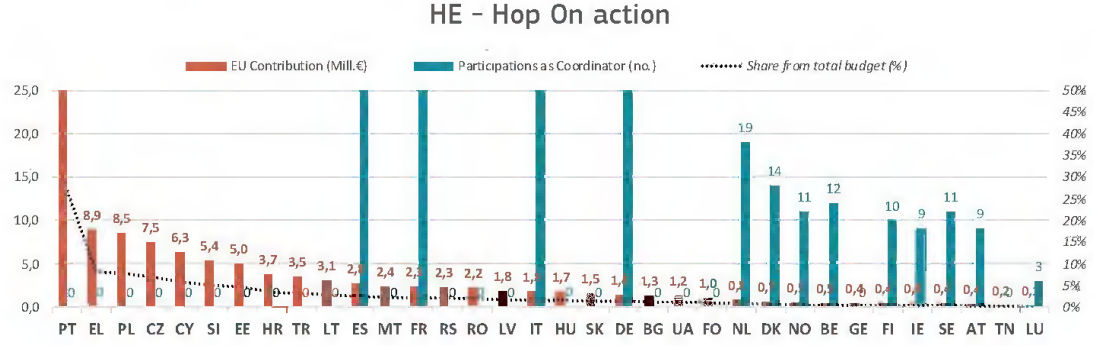

Figure 14: *Horizon Europe Hop On action, by country*

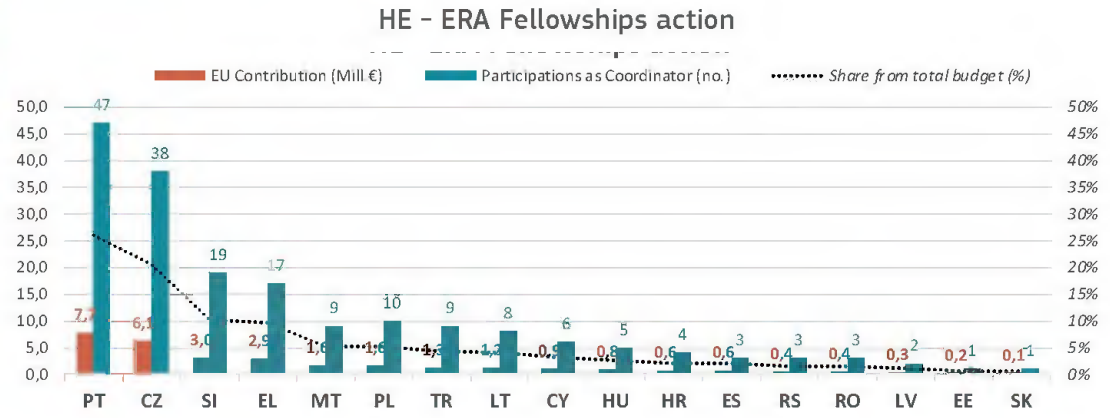

Figure 15: *Horizon Europe ERA Fellowships action, by country*

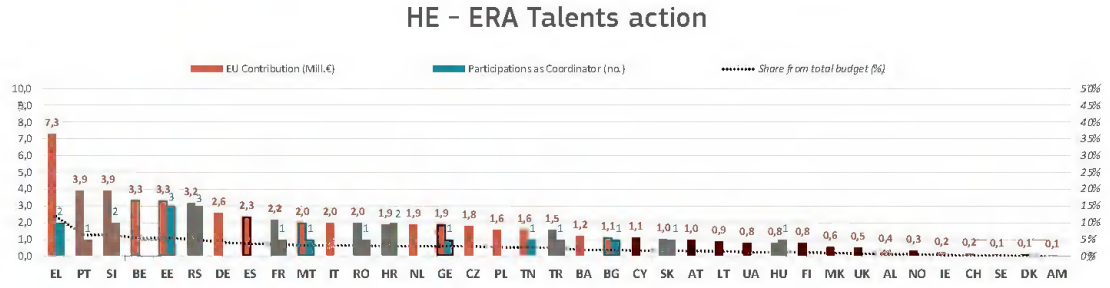

Figure 16: *Horizon Europe ERA Talents action, by country*

3 Country specific data

3.1 R&D intensity of the EU and its Member States

	R&D intensity 2020 (% of the GDP)	R&D 2020 target (% of the GDP)	Compound annual growth 2010-2020 (%)	Gap to reach the target in Meuros
Sweden	3.5	4	0.93	2394
Belgium	3.37	3	5.05	Target reached in 2020
Austria	3.21	3.76	1.60	2092
Germany	3.09	3	1.43	Target reached in 2020
Denmark	2.97	3	0.20	94
Finland	2.93	4	-2.33	2529
EU	**2.28**	**3.0**	**1.52**	**97778**
France	2.27	3	0.41	16923
Netherlands	2.27	2.5	2.99	1878
Slovenia	2.16	3.0	0.43	393
Czechia	1.95	(new target 2030:3.0%)	4.06	2313
Estonia	1.73	3.0	0.91	354
Portugal	1.61	2.7 - 3.3	0.51	2794
Hungary	1.58	1.8	3.41	306
Italy	1.5	1.53	2.17	Target reached in 2020
Greece	1.49	1.3	9.52	Target reached in 2020
Spain	1.4	2.0	0.36	6775
Poland	1.37	1.7	6.64	1755
Croatia	1.24	1.4	5.44	81
Ireland	1.12	1.9	-3.44	2675
Lithuania	1.12	1.9	3.55	352
Luxembourg	1.1	2.3 – 2.6	-2.52	871
Slovakia	0.89	1.2	3.85	292
Bulgaria	0.85	1.5	4.26	402
Cyprus	0.83	0.5	6.55	Target reached in 2019
Latvia	0.76	1.5	2.06	216
Malta	0.6	2	0.34	201
Romania	0.46	2	0.22	3405

Table 2: *R&D intensity (total investment in R&D as a percentage of GDP, SRIP report 2022)*

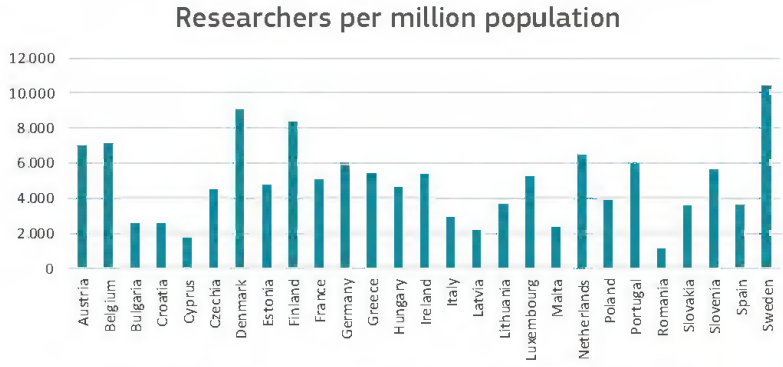

Figure 17: *Number or researchers per million population (Eurostat 2023)*

3.2 Key country-specific R&I challenges, as identified in the 2024 European Semester Country Reports[1]

Member State	Key R&I structural challenge as identified in the European Semester	
	Category	*Short description*
BULGARIA	**R&D investment**	R&D intensity was 0.77% in 2022, at the same level since 2020 and still far from the EU average (2.24%).
	Science-business linkages	Science-business cooperation, as reflected in the share of public-private co-publications, remains at the low end of the scale, 5.1% compared to the EU average of 7.1%.
	Public science base	Bulgaria continues to have a fragmented research system, comprising 91 public research organisations and 51 higher education institutions.
	R&I governance	The fragmented governance adversely affects the efficiency and performance of the national R&I ecosystem.
	Human capital	The number of public sector researchers per thousand active population remains among the lowest in the EU (2.6 in 2021 compared to an EU average of 4.2)
CZECHIA	**Public science base**	In terms of the quality of scientific and technological outputs, Czechia is performing below the EU average.
	Human capital	R&I performance is hampered by persistent difficulties in developing a highly skilled workforce in science and engineering.
	Science-business linkages	Science-business linkages are weak and the full potential to foster stronger collaboration remains untapped. Public expenditure on R&D financed by domestic business enterprises remains around half of the EU average.
	Business innovation	Although the situation has improved over the years as regards access to finance, many young and dynamic Czech firms lack sufficient sources of funding suited to their needs.
ESTONIA	**Business innovation**	The business sector's research-based innovation activities have expanded but are still too limited. Despite the growth since 2018, business R&D intensity remains well below the EU average (0.99% of GDP in 2022, against 1.47%).
	Science-business linkages	In 2021, R&D activities commissioned by businesses to universities and public research organisations represented 5.2% of public R&D, less than the EU average of 7.1%.
	Other	The level of green innovation is low. The share of environment-related patents has been decreasing and was 4.9% in 2019 (the EU average was 13.3%).
GREECE	**R&D investment**	Despite significant progress over the last two decades, R&D intensity was 1.48% in 2022, significantly below the European average (2.24%).
	Science-business linkages	Cooperation between public research bodies and the private sector is insufficient to effectively support knowledge and technology transfer.
	Business innovation	Innovation generation is still lagging behind, reflected in terms of innovation outputs (0.62% PCT patent applications per billion GDP vs EU average of 4.9%). These weaknesses result partly from relatively low R&D expenditure of SMEs (0.26% of GDP vs an EU average of 0.34%).
	Other	Strong regional disparities in research performance affect the diffusion of innovation

1 The information/data presented in this table is now being updated as part of the 2025 European Semester exercise. Our country-specific analysis will be further enriched this year and specific areas further explored, but, in general, the key challenges identified for each country should remain broadly unchanged.

CROATIA	**R&D investment**	R&D intensity stood at 1.43% in 2021. While strongly increasing it is still significantly below the European average of 2.24%.
	Public science base	Croatia continues to produce scientific outputs of modest quality and struggles to tackle the high level of institutional fragmentation in its public research system.
	Business innovation	The framework conditions for businesses to innovate and invest in R&D require further improvement.
	Science-business linkages	Business-science linkages show signs of improvement, but consistency in dedicated support measures is pivotal.
CYPRUS	**R&D investment**	Cyprus's R&D intensity has stagnated and remains far below the European average. In 2022, R&D investment slightly decreased from the previous year, falling to 0.77% of GDP.
	Business innovation	Private innovation is affected by very low R&D investments and low venture capital.
	Science-business linkages	Academia-business linkages are weak, hampering the valorisation of research results.
	Human capital	The share of new graduates in science & engineering per thousand population aged 25-34 ranks amongst the lowest in Europe.
LATVIA	**R&D investment**	R&D intensity stagnated at 0.75% of GDP in 2022 and remains significantly below the EU average of 2.24%.
	Human capital	The lack of human capital is holding back R&I performance. In particular, the number of STEM graduates continues to fall.
	Public science base	The quality of R&I outputs remains low. Latvia performs below the EU average in the main indicators for the quality of the R&I system. The fragmentation of the R&I ecosystem is also a cause of the low performance.
	Business innovation	Innovation activity in private companies is subdued, as indicated by the low number of patent applications. There also continues to be a shortage in venture capital (0.02% of GDP in 2022).
LITHUANIA	**R&D investment**	R&D intensity has fluctuated over the years and stood at 1.05% of GDP in 2022, less than half of the EU average.
	R&I governance	Historically, R&I governance was spread across several agencies, resulting in an uncoordinated policy mix.
	Science-business linkages	Science-business linkages remain overall too weak, as illustrated by the share of public-private co-publications among total publications which is the lowest in the EU.
	Public science base	The fragmentation of the public science base remains a major obstacle to further strengthening its performance and its contribution to the economy.
	Human capital	The number of doctoral graduates has dropped by 11.4% since 2016, as research careers remain unattractive (unattractive salary for early-stage researchers).

HUNGARY	**R&D investment**	Low public spending on R&D undermines the quality and performance of the science base, thus hindering Hungary's transition toward a more knowledge-based economy.
	Public science base	The share of scientific publications by Hungarian authors that were among the most cited in the world has been increasing over the years and reached 6.3% in 2019 but remained below the EU average of 9.8%.
	Human capital	Skill shortages remain a major challenge for the Hungarian research and innovation system, further exacerbated by deteriorating conditions for public researchers.
	R&I governance	The government's increasing influence over higher education and scientific institutions may hinder the country's capacity to retain its talent, while raising concerns concerning academic freedom.
	Science-business linkages	Public expenditure on R&D financed by businesses as % of total public expenditure on R&D remains well below EU average (2.89% in 2021, compared to 7.11%).
	Business innovation	At 0.201% of GDP, Hungary's publicly funded business expenditure on R&D is twice the EU average. The country's innovation output is led by big firms engaging in medium- and high-tech manufacturing. The decreasing trend in patent applications shows that the foreign firms tend to repatriate results away from Hungary back to headquarters.
MALTA	**R&D investment**	Total R&D intensity remains very modest (0.69% in 2022 against an EU average of 2.24%) and it is lower than 10 years ago.
	Human capital	The availability of human resources for research and innovation is a major concern. The number of new graduates in science and engineering per thousand population aged 25-34 is critically low and continues to decrease, falling to 5.2 in 2021, well below the EU average of 16.9.
	Business innovation	The level of public support for business R&D is one of the lowest in the EU and has been decreasing over the years, declining from 0.04% of GDP in 2010 to 0.01% in 2021.
	Science-business linkages	Academia-business cooperation remains modest. Public-private scientific co-publications increased in recent years but settled at 7.6% of the total number of publications.
POLAND	**Business innovation**	Poland's venture capital market is slowly expanding but is still weak. While the level of indirect public support to business innovation (through R&D tax incentives) has improved, it remains well below EU average (0.034% of GDP vs 0.100%).
	Human capital	Shortages of skills in science and engineering limit Polish competitiveness in new technologies and innovative sectors. New graduates in science and engineering per thousand population aged 25-34 have been on a downward trend in the last years.
	Science-business linkages	Science-business linkages remain limited, as shown by several indicators: both the share of public-private scientific co-publications as a share of all scientific publications and the level of business financing of public R&D remain well below the EU average.

PORTUGAL	**R&D investment**	While total R&D intensity is progressively increasing (and reached 1.70% in 2022, against an EU average of 2.24%), fully driven by increasing investment efforts from the private sector, public expenditure on R&D has been on a declining trend over the last decade and fell to 0.60% in 2022.
	Science-business linkages	The low degree of public-private cooperation remains a major bottleneck, but signs of improvement are visible. While the share of public-private co-publications among all publications of the country is still below EU average, it has been steadily increasing over recent years. On the other hand, the share of public expenditure on R&D financed by businesses has remained stagnant.
	Business innovation	The country has one of the highest levels of government support to business R&D in Europe, but the availability of venture capital is still very low and has remained stagnant in the last decade (0.022% in 2022 compared to an EU average of 0.085%), hindering the growth of young innovative enterprises.
	Human capital	Portugal experiences substantial levels of brain drain. The academic sector often offers unstable, fixed-term post-doctoral positions making it difficult to secure a permanent academic post.
ROMANIA	**R&D investment**	Romania's total R&D intensity is the lowest in the EU.
	R&I governance	Fragmentation and lack of vision at governmental level (not flagged in the Semester Annex but in the PSF Country report)
	Public science base	The high degree of fragmentation in the Romanian public research system has led to a weak public science base.
	Human capital	The lack of human capital for R&I is holding back Romania's competitiveness and its move towards a knowledge economy. The number of researchers (full-time equivalents) employed by the public sector per thousand active population is stagnating well below EU average.
	Science-business linkages	Weak science-industry collaboration remains a challenge. Public-private scientific co-publications as a percentage of total number of publications have been increasing over the past decade but remain below the EU average.
	Business innovation	Innovation activity and R&D absorption capacity at company level are limited. Business R&D intensity has been stagnating in recent years and, at 0.29% of GDP, is around one fifth of the EU average.
SLOVENIA	**R&D investment**	R&D intensity stood at 2.11% of GDP in 2022, below the European average (2.24%) and still far from its 2013 level (2.56%).
	Public science base	Both the share of top-cited publications (7.7%) and the share of international co-publications (54.1%) among all scientific publications of the country are below the EU average, which suggests that the Slovenian research system is still struggling to produce high quality scientific output.
	Science-business linkages	Public expenditure on R&D financed by businesses has been on a declining trend over the last decade. Stronger links between academia and businesses are essential for the development of innovations which are critical for the twin transition.
	Business innovation	Venture capital investment in Slovenia amounts to 0.003% of GDP, which is the lowest value in the EU.
SLOVAKIA	**R&D investment**	R&D intensity increased to 0.98% in 2022 but remains well below EU average, and below its peak in 2015 (1.16%).
	Public science base	A weak public research system, which produces scientific outputs of low quality, are a major barrier to a better performance of the Slovak R&I ecosystem.
	Science-business linkages	Collaboration between companies and the research sector is weak and technology transfer subdued.
	Business innovation	The development and diffusion of innovative technologies and solutions across the economy, in particular SMEs, remains limited.

3.3 Top 5 beneficiaries per Widening Member State and top 5 themes for participation

BULGARIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
TRAKIYSKI UNIVERSITET	€ 16,925,205.67	6	2	HES
SOFIA UNIVERSITY ST KLIMENT OHRIDSKI	€ 7,200,432.58	24	3	HES
PENSOFT PUBLISHERS	€ 6,802,541.50	26	0	PRC
AGRAREN UNIVERSITET - PLOVDIV	€ 4,675,736.75	11	1	HES
HOLCIM BELINETZERO STORAGE EAD	€ 4,315,007.82	1	0	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	91
Climate, Energy and Mobility	58
Digital, Industry and Space	56
Culture, creativity and inclusive society	38
Marie-Sklodowska-Curie Actions	26

CROATIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
CENTAR IZVRSNOSTI MARBLE DRUSTVO S OGRANICENOM ODGOVORNOSCU ZA ISTRAZIVANJE I RAZVOJ	€ 10,967,620.00	1	0	REC
SVEUCILISTE U ZAGREBU FAKULTET ELEKTROTEHNIKE I RACUNARSTVA	€ 9,171,499.25	20	5	HES
GENOS DOO ZA VJESTACENJE I ANALIZU	€ 5,354,875.00	8	1	PRC
RUDER BOSKOVIC INSTITUTE	€ 4,725,802.95	20	4	REC
JADROLINIJA, DRUSTVO ZA LINIJSKI POMORSKI PRIJEVOZ PUTNIKA ITERETA	€ 4,187,750.00	1	0	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	77
Climate, Energy and Mobility	52
Widening Participation and Spreading Excellence	31
Widening Participation and Spreading Excellence	29
Marie-Sklodowska-Curie Actions	27

CYPRUS

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
UNIVERSITY OF CYPRUS	€ 53,563,522.36	97	41	HES
THE CYPRUS INSTITUTE	€ 25,660,891.60	60	12	HES
EBOS TECHNOLOGIES LIMITED	€ 14,275,985.25	35	0	PRC
SUITE5 DATA INTELLIGENCE SOLUTIONS LIMITED	€ 13,746,090.75	30	0	PRC
UBITECH LIMITED	€ 11,383,118.75	26	2	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Digital, Industry and Space	124
Climate, Energy and Mobility	96
Food, Bioeconomy, Natural resources, Agriculture and Environment	80
Marie-Sklodowska-Curie Actions	62
Civil Security for Society	49

CZECHIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
Masarykova univerzita	€ 51,994,807.60	96	38	HES
UNIVERZITA KARLOVA	€ 38,157,228.34	87	19	HES
CESKE VYSOKE UCENI TECHNICKE V PRAZE	€ 25,343,502.79	57	14	HES
HONEYWELL INTERNATIONAL SRO	€ 21,305,774.72	14	4	PRC
UNIVERZITA PALACKEHO V OLOMOUCI	€ 20,058,470.77	49	24	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Climate, Energy and Mobility	149
Digital, Industry and Space	131
Marie-Sklodowska-Curie Actions	114
Food, Bioeconomy, Natural resources, Agriculture and Environment	105
Widening Participation and Spreading Excellence	92

ESTONIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
TARTU ULIKOOL	€ 77,925,046.18	122	27	HES
TALLINNA TEHNIKAÜLIKOOL	€ 26,703,303.98	66	11	HES
FIBENOL IMAVERE OU	€ 16,519,465.85	10	1	PRC
TALLINN UNIVERSITY	€ 13,336,014.67	35	11	HES
EESTI MAAULIKOOL	€ 7,004,470.43	24	4	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	81
Climate, Energy and Mobility	76
Digital, Industry and Space	61
Health	56
Culture, creativity and inclusive society	46

GREECE

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
ETHNIKO KENTRO EREVNAS KAI TECHNOLOGIKIS ANAPTYXIS	€ 139,148,607.36	279	71	REC
IDRYMA TECHNOLOGIAS KAI EREVNAS	€ 98,499,687.81	177	62	REC
EREVNITIKO PANEPISTIMIAKO INSTITOUTO SYSTIMATON EPIKOINONION KAI YPOLOGISTON	€ 85,327,190.08	149	40	REC
ARISTOTELIO PANEPISTIMIO THESSALONIKIS	€ 84,767,473.64	168	39	HES
ETHNICON METSOVION POLYTECHNION	€ 79,870,119.85	166	31	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Digital, Industry and Space	453
Climate, Energy and Mobility	396
Food, Bioeconomy, Natural resources, Agriculture and Environment	330
Marie-Sklodowska-Curie Actions	165
Health	134

HUNGARY

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
BUDAPESTI MUSZAKI ES GAZDASAGTUDOMANYI EGYETEM	€ 13,616,561.61	39	4	HES
EOTVOS LORAND TUDOMANYEGYETEM	€ 12,002,667.75	32	11	HES
NEMZETI KUTATASI FEJLESZTESI ES INNOVACIOS HIVATAL	€ 10,307,787.55	24	3	PUB
HUN-REN SZEGEDI BIOLOGIAI KUTATOKOZPONT	€ 6,912,648.00	7	2	REC
MAGYAR TUDOMANYOS AKADEMIA TITKARSAGA	€ 5,014,800.00	1	1	PUB

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	128
Climate, Energy and Mobility	70
Marie-Sklodowska-Curie Actions	63
Digital, Industry and Space	59
Health	59

LATVIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
BERNU KLINISKA UNIVERSITATES SLIMNICA VALSTS SIA	€ 10,344,077.50	6	1	PRC
LATVIJAS UNIVERSITATE	€ 10,076,276.71	32	10	HES
LATVIJAS ZINATNES PADOME	€ 8,736,195.70	23	0	REC
RIGAS TEHNISKA UNIVERSITATE	€ 8,701,568.14	24	5	HES
LATVIJAS UNIVERSITATES CIETVIELU FIZIKAS INSTITUTS	€ 8,063,077.00	10	3	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	64
Digital, Industry and Space	49
Climate, Energy and Mobility	44
Widening Participation and Spreading Excellence	21
Marie-Sklodowska-Curie Actions	20

LITHUANIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
VILNIAUS UNIVERSITETAS	€ 15,093,280.28	46	17	HES
KAUNO TECHNOLOGIJOS UNIVERSITETAS	€ 14,325,283.85	37	4	HES
VYTAUTO DIDZIOJO UNIVERSITETAS	€ 9,875,671.55	25	3	HES
Lietuvos mokslo taryba	€ 7,509,406.36	33	0	PUB
LIETUVOS SVEIKATOS MOKSLU UNIVERSITETAS	€ 7,003,243.75	15	0	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	73
Climate, Energy and Mobility	61
Digital, Industry and Space	56
Health	50
Marie-Sklodowska-Curie Actions	26

MALTA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
UNIVERSITA TA MALTA	€ 15,631,040.75	56	23	HES
MINISTRY FOR EDUCATION, SPORT, YOUTH, RESEARCH AND INNOVATION	€ 3,434,119.59	13	0	PUB
ACCELER8 LIMITED	€ 2,998,812.50	5	1	PRC
OMNISCOPE LIMITED	€ 2,628,594.50	5	0	PRC
AQUABIOTECH LIMITED	€ 1,526,124.50	7	0	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	23
Marie-Sklodowska-Curie Actions	20
Widening Participation and Spreading Excellence	20
Climate, Energy and Mobility	18
Digital, Industry and Space	14

POLAND

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
FUNDINGBOX ACCELERATOR SP ZOO	€ 49,172,038.00	30	3	OTH
UNIWERSYTET WARSZAWSKI	€ 41,515,419.49	83	23	HES
UNIWERSYTET JAGIELLONSKI	€ 32,978,595.21	62	17	HES
NARODOWE CENTRUM BADAN I ROZWOJU	€ 27,996,108.84	30	1	PUB
INSTYTUT CHEMII BIOORGANICZNEJ POLSKIEJ AKADEMII NAUK	€ 20,304,831.00	37	2	REC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Digital, Industry and Space	201
Food, Bioeconomy, Natural resources, Agriculture and Environment	197
Climate, Energy and Mobility	185
Marie-Sklodowska-Curie Actions	148
Culture, creativity and inclusive society	104

PORTUGAL

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
UNIVERSIDADE DE COIMBRA	€ 62,306,825.72	91	35	HES
UNIVERSIDADE NOVA DE LISBOA	€ 62,186,267.71	116	42	HES
INESC TEC - INSTITUTO DE ENGENHARIADE SISTEMAS E COMPUTADORES, TECNOLOGIA E CIENCIA	€ 43,851,897.46	67	9	REC
INSTITUTO DE MEDICINA MOLECULAR JOAO LOBO ANTUNES	€ 29,780,660.64	36	13	REC
UNIVERSIDADE DE AVEIRO	€ 26,607,682.03	80	24	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	247
Digital, Industry and Space	245
Climate, Energy and Mobility	237
Marie-Sklodowska-Curie Actions	227
Health	137

ROMANIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
UNITATEA EXECUTIVA PENTRU FINANTAREA INVATAMANTULUI SUPERIOR A CERCETARII DEZVOLTARII SI INOVARII	€ 21,200,750.53	35	2	REC
UNIVERSITATEA BABES BOLYAI	€ 12,559,064.18	34	7	HES
SOFTWARE IMAGINATION & VISION SRL	€ 11,024,718.25	25	4	PRC
UNIVERSITATEA DIN BUCURESTI	€ 10,166,484.07	33	4	HES
GSP OFFSHORE SRL	€ 8,798,198.50	1	0	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	125
Digital, Industry and Space	108
Climate, Energy and Mobility	105
Health	69
Marie-Sklodowska-Curie Actions	51

SLOVAKIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
NARODNE LESNICKE CENTRUM	€ 9,335,964.75	7	1	REC
UNIVERZITA KOMENSKEHO V BRATISLAVE	€ 7,350,439.61	21	8	HES
PEDAL CONSULTING SRO	€ 5,927,843.70	22	3	PRC
SLOVENSKA TECHNICKA UNIVERZITA V BRATISLAVE	€ 4,575,496.28	16	2	HES
VYSKUMNY USTAV PAPIERA A CELULOZY AS	€ 4,386,562.50	1	0	PRC

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Food, Bioeconomy, Natural resources, Agriculture and Environment	71
Climate, Energy and Mobility	44
Digital, Industry and Space	36
Marie-Sklodowska-Curie Actions	35
Culture, creativity and inclusive society	28

SLOVENIA

Legal Name	Net EU Contribution	Participation	Coordinators	Organisation Type
UNIVERZA V LJUBLJANI	€ 61,184,513.13	176	32	HES
INSTITUT JOZEF STEFAN	€ 46,564,585.40	102	27	REC
KEMIJSKI INSTITUT	€ 39,543,993.18	60	10	REC
PIPISTREL VERTICAL SOLUTIONS DOO PODJETJE ZA NAPREDNE LETALSKE RESITVE	€ 10,071,354.26	13	2	PRC
UNIVERZA V MARIBORU	€ 7,991,464.56	28	4	HES

Top 5 thematic priorities for the country's successful applicants	Retained proposals
Digital, Industry and Space	128
Climate, Energy and Mobility	125
Food, Bioeconomy, Natural resources, Agriculture and Environment	113
Marie-Sklodowska-Curie Actions	69
Widening Participation and Spreading Excellence	59

ANNEX III

Summary Survey 'Capitalising on Excellence'

ERAC background document for the strategic debate on Capitalising on excellence and overcoming the innovation divide

This summary reflects the main outcomes and recurring themes drawn from the responses submitted by ERAC delegates to the "Capitalising on Excellence" survey. It does not aim to provide an exhaustive account of all country-specific measures, activities, or contexts, and is solely based on the information voluntarily provided by the 16 Member States and associated countries that responded to the survey.

1. Intensity of Participation

Most countries report that success rates under Horizon Europe are stable or improving. However, there is widespread recognition that **submissions remain uneven**, and that boosting the volume and quality of applications (especially from underrepresented institutions) is critical to increasing participation.

Common Challenges Identified

- Capacity limitations and insufficient support hinder participation (Bulgaria, Slovenia, Slovakia, Montenegro).
- Lack of awareness about the opportunities, limited proposal writing experience and/or lack of strong research management structures (Bulgaria, Croatia, Lithuania, Hungary, Montenegro, Portugal)
- Small or fragmented R&I ecosystems (Iceland, Montenegro, Lithuania, Croatia).
- Limited access to international networks or weak consortia-building experience (Bulgaria, Slovakia, Portugal, Lithuania, Slovenia).
- Saturation of national or cohesion programmes discourages further coordination or proposal writing in HE (Croatia, Czechia, Iceland, Greece).
- Administrative burdens and/or institutional complexity (Belgium, Bulgaria, Iceland, Slovenia, Greece, Montenegro).
- Misalignment with EU calls calendars (Belgium)
- Uneven participation in ERC, MSCA and/or EIC schemes, especially outside top-performing centres (Greece, Portugal, Croatia).
- Need for more SMEs increasing their investment in R&D (Ireland)

Measures Taken by Member States

- **National support schemes** for proposal preparation and co-funding:
    - Croatia, Slovenia: Microgrants for applications and SoE projects.
    - Netherlands: "Matching Horizon Europe" complementary co-funding scheme.
    - Portugal: ERC-PT programme and Widening-linked funding, with state budget and ERDF combined
    - Slovakia: Travel and coordination grants.
    - Czechia: Travel grants and expert pre-screening service for coordinators
    - Hungary: EU_KP call for proposal preparation and consortium building
    - Lithuania: €36M Horizon Europe Acceleration Programme for training, proposal support, and co-funding
    - Ireland: several funding support schemes to allow companies to progress
- **Pre-screening, proposal support or expert feedback systems** offered (Slovakia, Netherlands, Slovenia, Germany, Czechia, Portugal, Greece, Hungary, Iceland, Montenegro, Lithuania).
- **Training services, awareness-raising and outreach campaigns**, including institutions from underrepresented sectors or less research-intensive regions (Austria, Belgium, Bulgaria, Croatia, Czechia, Slovakia, Montenegro, Slovenia, Portugal, Netherlands, Greece, Lithuania).
- **Strategic use of Widening instruments** to develop coordinator skills and build consortia experience (Slovakia, Portugal, Greece).
- **Coordination of stakeholders** and definition of KPIs for national performance monitoring (Croatia, Austria, Netherlands, Montenegro, Portugal, Slovenia).

2. National Contact Points (NCPs) and Support Systems

Well-Resourced, centralised NCPs

- **Austria**: 31 full-time NCPs housed in FFG; broad service offering (including training programmes and dedicated support) and stakeholder engagement.
- **Lithuania**: 19 FTEs, centrally coordinated at the Research Council; strongly linked with national reform strategy.
- **Germany**: 140 individuals across thematic agencies; strong coordination, branding, and training systems.
- **Netherlands**: All NCPs located at RVO in a unified, interdisciplinary team; strong data analytics and high client satisfaction. Covers all areas and legal and admin issues of the FP.
- **Iceland**: All NCPs hosted within RANNÍS; integrated with national funding.

- **Hungary**: 13 FTEs (11 at NRDIO, 2 for ERC at Academy of Sciences)
- **Ireland**: Led and centrally coordinated by Enterprise Ireland (15 FTEs) plus eight FTE sectoral experts from relevant Ministries and agencies

Mixed or Decentralised Systems

- **Belgium**: ~27 FTEs across federal and regional structures; distinct NCP entities in Wallonia, Brussels, Flanders.
- **Greece**: Shared roles among GSRI, EKT, and PRAXI; mixture of coordination by GSRI and outsourcing
- **Portugal**: Decentralised and thematic; most NCPs part-time with multiple responsibilities.
- **Croatia**: NCPs hosted at various institutions; Ministry leads, but only AMEUP staff are full-time.
- **Bulgaria**: Hybrid and mostly voluntary model; no core funding for coordination.

Lean or Volunteer-Based Systems

- **Montenegro**: Ministry of Education, Science and Innovation staff coordinate with academic and innovation sector volunteers.
- **Slovenia**: ~8 FTEs across distributed part-time roles; many double as programme committee members.

Notable Good Practices

- Pre-screening and expert feedback systems (Czechia, Slovakia, Netherlands, Slovenia, Germany, Portugal, Greece, Montenegro, Lithuania).
- Dedicated national platforms and training programmes and events (Austria, Netherlands, Portugal, Lithuania).
- Thematic or regional outreach initiatives, e.g. regional summer school and "Coffee with NCP" (Slovakia), NINET (Czechia), on-site workshops (Belgium).
- Comprehensive data monitoring on national participation, used to shape strategy (Netherlands, Croatia, Portugal, Greece).
- Implementation of fund transfer mechanisms and synergy alignment (Lithuania, Croatia, Montenegro — data collection phase)
- Use of human resources instead of digital/AI tools for proposal submission support (Netherlands)
- NCP agency is involved in research commercialisation as well as direct and indirect equity investment at all levels of the Irish deep-tech ecosystem (Ireland)

3. National Investments and Use of the Seal of Excellence (SoE)

Seal of Excellence (SoE) Usage

- **Active and strategic use**:
    - *Lithuania*, *Slovenia*, *Slovakia*, *Croatia*, *Czechia, Portugal* — support MSCA, EIC, and/or ERC-linked proposals. Countries mentioned SoE as an important instrument of co-financing excellent research projects as it provides an opportunity to use the evaluation results and to co-finance excellent projects evaluated the international context
- **Partial or regional use**:
    - *Belgium* (notably Flanders), *Bulgaria*, *Greece* — limited support or past pilot schemes
    - *Ireland* – No formal process or dedicated funding allocation for SoE awardees in Ireland. However, experience with EDIHs.
- **Minimal or symbolic uptake**:
    - *Germany* — only one regional scheme (Hessen); no national plans to expand.
    - *Netherlands* — no systematic support; only one known example (Leiden UMC).
    - *Hungary*
    - *Iceland*

Transfer of Funds (SoE or other mechanisms)

- **Successfully used**:
    - *Lithuania*: €18.5M transferred under ERDF; second tranche pending.
    - *Croatia*: New programme (DIGIT project) launched in late 2024.
    - *Portugal*: ANI financial support to companies for EIC Transition and Accelerator Calls.
    - Slovenia: cofinancing SoE in e.g. MSCAIf/PF or ERC
- **Interest expressed or mechanisms in preparation**:
    - *Bulgaria Portugal*, *Slovakia*, *Slovenia* – preparing legal or strategic frameworks
    - *Montenegro* – currently collecting data on this
- **Not used or low priority**:
    - *Austria*, *Czechia*, *Germany, Hungary, Netherlands, Greece, Iceland (n/a)*

4. R&D Investment Trends and Policy Coordination

High Intensity and Strategic Leadership

- **Austria**: 3.35% of GDP (target 4% for 2030)
- **Belgium**: 3.37% (3% target met in 2020)
- **Germany**: 3.1% (2023)

Growing or Transitional Systems

- **Netherlands**: 2.23%, targeting 3% by 2030
- **Slovenia**: 2.13%, aiming for 3.5% by 2030
- **Iceland**: 2.47% (2020), target 3.0%. No newer data.
- **Portugal**, **Croatia, Hungary, Slovakia**, **Lithuania**: actively growing, often supported by RRF and Widening
- **Ireland:** National target of 2.5% of GNI* (rather than GDP) by 2030. GNI* is considered a more accurate measure of the size of the Irish economy for the purpose of intensity rate calculations.

Challenges Remain

- **Montenegro**: No recent R&D data; system-building underway
- **Greece**, **Bulgaria**: Underfunded public R&I systems; need for increased public investment and alignment

Country	R&D intensity 2020 (% of the GDP) **Update 2024**	R&D 2020 target (% of the GDP) **Update 2024**	Compound annual growth 2010-2020 (%) **Update 2024**	Gap to reach the target in M euro **Update 2024**
Austria	3,35%	(new government programme target 2030: 4%)	0,75%	
Belgium	3,37	3,0	5,05	Target reached in 2020
Bulgaria	0,85	1,50	29% total growth	400 M euro
Croatia	1,43%			
Czechia	1, 83% (data for 2023)	3% (for 2030)		
Germany	3,10%		4,98%	
Greece	1,49%	1,55% (estimate)	6,14%	
Lithuania	1,07	No target for 2023 Lithuania has no yearly investment targets, but we have a long term target – 1% of GDP from the national budget to R&D in higher education and government sectors by 2030, set in the Agreement on Lithuanian Education Policy, signed by the parties in the Parliament. In the period of 2022-2024 governmental funding for R&D doubled: from 185 mEur in 2021 to 348 mEur in 2024. It is estimated that in 2025 governmental funding will reach 0,52 % of	0,38	

		GDP (in 2021 – 0,31% of GDP).		
Montenegro				
Netherlands	2,23% (data for 2023)	3%	n/a	€14.3 billion from 2022 to 2025 To reach 3% of GDP for R&D spending in 2025, an additional €14.3 billion would be required compared to the €21.6 billion spent in 2022, according to the most recent GDP forecasts.
Portugal	1,70	2,02	The compound annual growth based on millions of euros dedicated to R&D in 2013 and in 2023 is 6,73%. The compound annual growth between 2013 and 2023 based on the % of GDP is 2,48%. Apparently, the table presented for 2010-2020 used the % of GDP (1,60% in 2010 and 1,61% in 2020).	860

Slovenia	2,13	3,5 %[i]	0,22% Internal calculation, based on formula: CAGR = (EV / SV)1 / n - 1 where: EV = Investment's ending value- 2023 SV = Investment's starting value -2010 n = Number of investment periods (months, years, etc.)	874 mio
Iceland	2,47	3,0		
Ireland	1,59% (2023)	1,12% (2020)	0.005%-1.5% (2013-2023)	