TECHRITORY 2026

Horizon Europe

Advanced Digital Technologies Brokerage Event

Strategic Priorities Shaping the Next Framework Programme & Europe's Digital Future



Dr. Linda Vecbiskena
Representative in Brussels
Latvian Council of Science

STRATEGY • PARTNERSHIPS • POSITIONING


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Strategic Priorities Shaping the Next Framework Programme & Europe's Digital Future




A stronger Europe together
The future of European competitiveness
Much more than a market
COMPETITIVENESS
PRODUCTIVITY
INVESTMENT
INNOVATION
SINGLE MARKET
STRATEGIC AUTONOMY
SINGLE MARKET
PEOPLE
SKILLS
COHESION
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The Next Framework Programme = a Positioning Moment

Horizon Europe (2028-2034) will build on the achievements of its predecessors, scaling what works, simplifying what is possible, and focusing investment where Europe needs it most. It will be tightly connected to the European Competitiveness Fund.

THE CENTRAL QUESTION

How do we move from observing FP10 take shape to helping shape Europe's research & innovation future?



Horizon Europe 2028–2034 keeps a familiar structure

Horizon Europe (2028-2034): twice bigger, simpler, faster and more impactful.

Pillar I

EXCELLENT SCIENCE

€44.079 BILLION

- EUROPEAN RESEARCH COUNCIL
- MARIE SKŁODOWSKA-CURIE ACTIONS
- SCIENCE FOR EU POLICIES

Pillar II

COMPETITIVENESS AND SOCIETY

€75.876 BILLION

COMPETITIVENESS[1] :

1. Clean Transition and Industrial Decarbonisation
2. Health, Biotech, Agriculture and Bioeconomy
3. Digital leadership
4. Resilience and Security, Defence Industry and Space

SOCIETY:

1. Global societal challenges
2. EU Missions
3. New European Bauhaus Facility

Pillar III

INNOVATION

€38.785 BILLION

- EUROPEAN INNOVATION COUNCIL
- INNOVATION ECOSYSTEMS AND THE KNOWLEDGE TRIANGLE

Pillar IV

EUROPEAN RESEARCH AREA

€16.262 BILLION

- ERA POLICIES
- RESEARCH AND TECHNOLOGY INFRASTRUCTURES
- WIDENING PARTICIPATION AND SPREADING EXCELLENCE

175B

Budget draft proposed by the European Comission

What's on the table right now?

Europe wants to move faster from knowledge to real-world solutions, while reducing geographic gaps in participation.

01

Governance

Pillar II stays under FP10 governance instead of ECF governance

Lead Experts drive Pillar II in its implementation, while the Union institutions & MS maintain full control over the priority setting

02

Budget

200B → 158B → ?

03

Partnerships

Under reconstruction

04

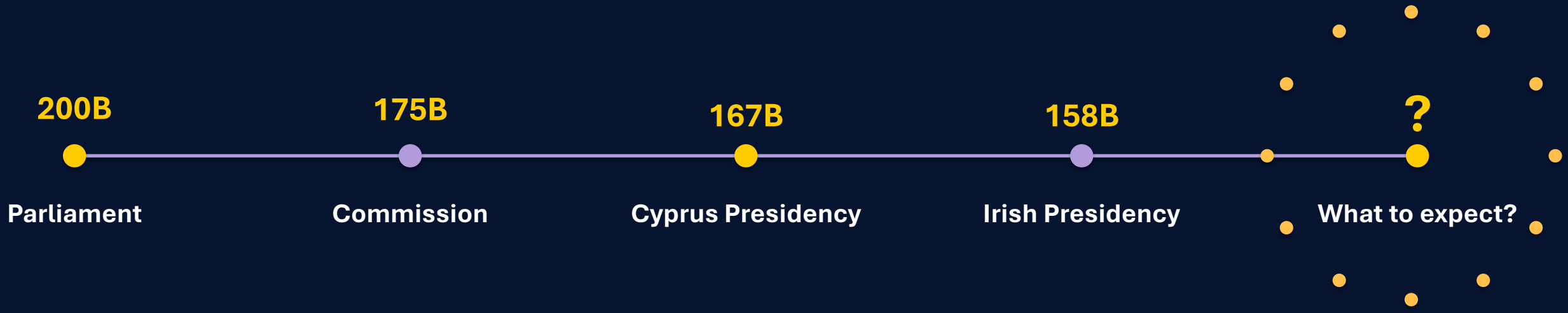
Widening

New concept

«Two years ago, Mario Draghi asked three things of Europe's research programme: reform it, put experts in the lead, and invest 200 billion. FP10 is the only EU programme for which his report recommends a specific amount. We are committed to all three points, which requires a substantial change from the Commission proposal,» Christian Ehler, MEP & EPP ITRE Coordinator, recently announced on social media.

Budget on fire

4 ECF Policy Windows: Clean Transition and Industrial Decarbonisation | Health, Biotech, Agriculture and Bioeconomy | Digital Leadership | Resilience and Security, Defence Industry and Space



As Ekaterina Zaharieva, Commissioner for Startups, Research and Innovation, pointed out at the international AI summit in Dublin on October 14, «Each billion euro cut in Horizon Europe would result in cutting 1,700 awardees, more than 300 SMEs and 500 companies, 600 universities and 2,600 researchers.»



EUROPEAN INNOVATION COUNCIL SUMMIT 26

European Innovation Council

Ekaterina Zaharieva, Commissioner for Startups, Research and Innovation, said:

«You spoke, we listened. As one of Europe's strongest brands, Horizon Europe will place research and innovation at the heart of the EU economy and investment strategy. We will attract and retain talents through 'Choose Europe', de-risk and mobilise private research and innovation financing, empowering innovative startups and work together with Member States to reach the 3% investment target.»



Moonshots

Objective: ambitious technology driven projects that boost the EU's strategic autonomy through research, development and deployment.

01
the future circular collider

02
clean aviation

03
quantum computing

04
next-generation AI

05
data sovereignty

06
automated transport & mobility

07
regenerative therapies

08
fusion energy

09
space economy

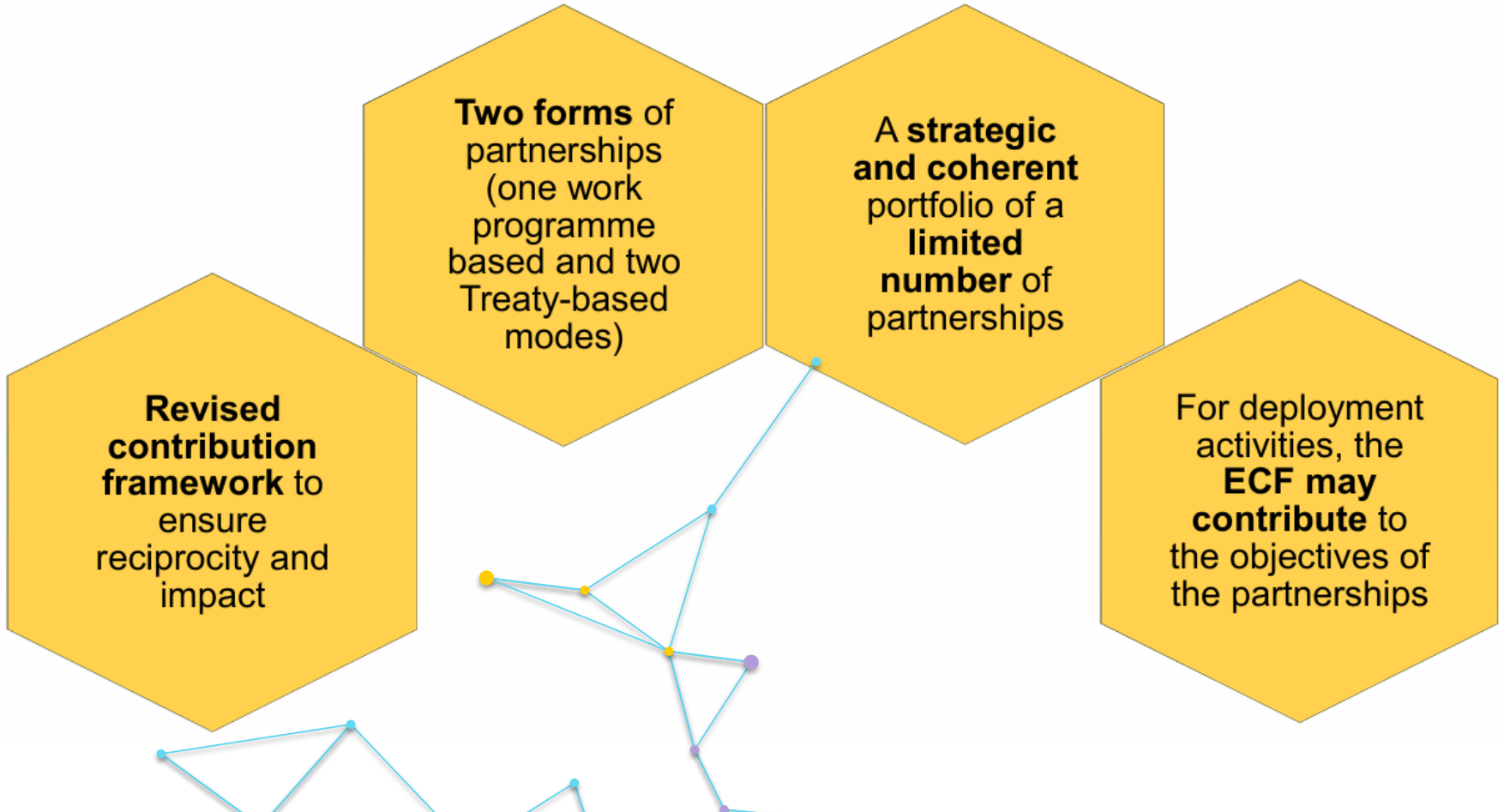
10
zero water pollution & ocean observation



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European Partnerships

European Partnerships will remain a key instrument of the programme and will work in synergy with the ECF. The legislation and the future European Partnerships portfolio are being shaped in parallel.



Call for evidence

Feedback period

16 June 2026 - 14 July 2026

Feedback: Closed

Public consultation

Consultation period

10 July 2026 - 16 October 2026

Feedback: Closed

Upcoming

Commission adoption

Planned for

Fourth quarter 2026

Feedback: Upcoming

Widening

3.3% of overall budget: to preserve support for a broader range of countries and research ecosystems.

EXELLENCE



TRANSITION COUNTRIES

- Cyprus
- Malta
- Estonia
- Portugal
- Greece
- Slovenia

WIDENING COUNTRIES

- Bulgaria
- Lithuania
- Croatia
- Poland
- Czechia
- Romania
- Hungary
- Slovakia
- Latvia

International Cooperation – Association to Horizon Europe

Approach to 3rd country association similar to Horizon Europe.

MAIN NOVELTIES

Association may be «full or partial» and consistent with the objectives of Horizon Europe

Scope of association to consider not only benefit but also risk to the Union

Association also extended to European Micro-States

Joint Statement

Association: A Strategic Asset for Europe's Research, Innovation and Competitiveness

31 August 2026

Preamble

The European Commission has described association to Horizon Europe as *"the closest form of cooperation with non-EU countries, which allows entities of associated countries to participate in programme actions on equal terms with entities of EU countries."* Experience across successive EU Framework Programmes has consistently demonstrated the value of this model in strengthening scientific excellence, fostering collaboration and enhancing Europe's research and innovation (R&I) capacity.

As discussions on the next generation of EU research and innovation programmes enter a decisive phase, we, ten like-minded countries associated to Horizon Europe 2021–2027, present our shared perspective on the future of association. With the Council and the European Parliament defining their positions on Horizon Europe and the European Competitiveness Fund (ECF) 2028–2034, we believe association should remain a cornerstone of EU research and innovation policy.

Experience from successive EU Framework Programmes has shown that:

- **Association strengthens Europe's global R&I capacity and competitiveness** by widening access to talent, excellence, knowledge, research infrastructures, innovation ecosystems and markets.
- **Association enhances Europe's resilience and technological leadership** by enabling trusted partners to address shared scientific, societal and geopolitical challenges together.
- **Openness is a strategic strength.** It can be combined with clear, risk-based and proportionate safeguards that protect Europe's interests while preserving excellence and trusted international cooperation.
- **Associated countries make substantial scientific, strategic and financial contributions**, increasing the programme's scale, impact and global reach.

Signed by Luxembourg, Canada, Faroe Islands, Iceland, Japan, New Zealand, Norway, Republic of Korea, Switzerland, United Kingdom.

Dual-Use by Design

The statement calls to support a “dual-use by design” approach, including dedicated calls aimed exclusively at dual-use technologies, with the possibility also to support dual-use activities in open calls.

JOINT STATEMENT ON SUPPORT FOR STRENGTHENING EUROPEAN COMPETITIVENESS AND SECURITY THROUGH THE INTEGRATION OF DUAL-USE RESEARCH AND INNOVATION IN THE NEXT FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

In today's rapidly evolving global landscape, Europe's competitiveness, security and wellbeing rely on our ability to develop and deploy key technologies. All critical technologies have dual-use potential by default and can serve strategic objectives related to competitiveness, resilience, defence and security. This fundamental shift requires us to rethink the role of research and innovation and to align our policy frameworks with the realities of technological development and geopolitical competition.

We, the Research Ministers from Denmark, Estonia, Finland, Latvia, Lithuania, Poland, Romania and Sweden, call for the next EU Framework Programme for Research and Innovation, "Horizon Europe", to support technologies with dual-use potential through a horizontal, responsible and risk-based approach. The choices we make today regarding Horizon Europe will influence Europe's ability to transform scientific excellence into economic growth and strategic resilience for decades to come.

We recognise the concerns expressed regarding the inclusion of research with dual-use potential within Horizon Europe, and share the commitment to academic freedom, open science, excellence, international cooperation and societal impact that lies behind these concerns.

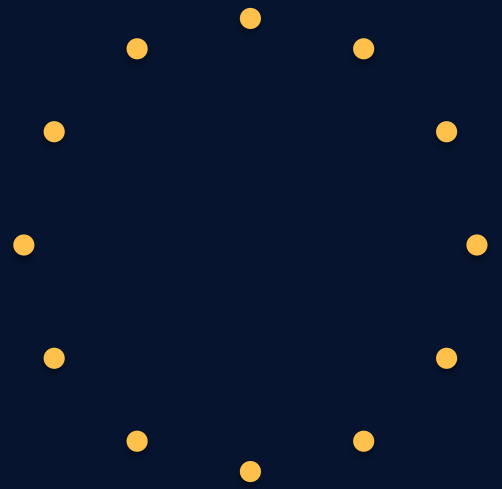
Signed by Estonia, Denmark, Finland, Latvia, Lithuania, Poland, Sweden, Romania.

International Cooperation



[WIPO Global Innovation Index 2026: Switzerland, Sweden, US, Republic of Korea and Singapore Top Ranking; AI Reshaping Innovation Investments as Deep Science Startups Top $7.6 Trillion]





Thank you!