

## EARTO Analysis on Budget and Structure of Horizon Europe 2.0

25 July 2025

Following the European Commission (EC)'s proposal for establishing [Horizon Europe](#) and its dedicated [Specific Programme](#) starting in 2028, this memo provides a comparative overview of the proposed changes in budget and structure compared to the current EU Framework Programme for Research & Innovation, Horizon Europe (2021–2027). It is important to note that the figures presented in this analysis remain provisional at this stage and will be subject to further institutional negotiations under the upcoming Multiannual Financial Framework ([MFF](#)) for 2028–2034.

Overall, the EC proposes a general budget increase from €79.5 billion to €175 billion, representing a +83% increase compared to the current Horizon Europe. While no major structural overhaul is introduced, a key modification is the integration of Research and Technology Infrastructures (RTIs) under a consolidated Pillar IV: "European Research Area" (ERA). In parallel, the introduction of the [European Competitiveness Fund](#) represents a major evolution in programming and governance, yet significant uncertainties remain regarding its role in Pillar II's implementation and its overall governance and integration.

### **Pillar I - Excellent Science:**

- This Pillar maintains a similar share of the overall budget, accounting for +25.2% (compared to +26% under the current Horizon Europe). While the **European Research Council (ERC)** budget is set to double, reaching €31.5 billion, it is worth underlining that Research Infrastructures (RIs) have been moved out of Pillar I (of the current Horizon Europe) and are now part of the RTIs under Pillar IV.
- The Joint Research Centre (JRC) budget has been moved from the current Pillar II to Pillar I, accompanied by a +32% increase.

### **Pillar II - Competitiveness & Society:**

- Pillar II of Horizon Europe 2.0 receives an increase of €22.4 billion, representing a +42% rise in its total budget.
- However, a **key uncertainty** surrounds its relationship with the **European Competitiveness Fund**: while the fund is meant to support programming within this pillar, its operational details and governance remain vague.
- If compared to the "cluster" structure and budget of the current Horizon Europe, **the four thematic "windows"** of the new Pillar II will see the following changes:
  - **Clean Transition and Industrial Decarbonisation**: +67% increase, totaling approximately €25 billion (An increase of €10 billion when compared to Horizon Europe cluster 5).
  - **Health, Biotech, Agriculture and Bioeconomy**: +14% increase, totaling approximately €20 billion (An increase of €2.5 billion when compared to Horizon Europe clusters 1 and 6).
  - **Digital Leadership**: +10% increase, totaling approximately €17 billion (An increase of +€1.5 billion when compared to Horizon Europe Cluster 4).
  - **Resilience and Security, Defence Industry and Space**: +303% increase, totaling €6.4 billion (An increase of +€4.8 billion when compared to Horizon Europe cluster 3).

### **Pillar III - Innovation:**

- Pillar III sees the largest relative increase, with a +185% rise in budget, reaching €38.8 billion (+22% of the total budget of Horizon Europe 2.0, compared to +14% under Horizon Europe).
- The **European Innovation Council (EIC)** experiences the most significant growth within this pillar, with a **+242% increase**, reaching **€34.5 billion**.

### **Pillar IV - European Research Area:**

- This Pillar does not introduce new instruments per se, but rather consolidates elements previously housed under other pillars.
- Notably, the consolidation of Research Infrastructures (RIs) and Technology Infrastructures (TIs) into **Research and Technology Infrastructures (RTIs)** under Pillar IV marks a strategic shift in how RTIs are funded and managed, with a +353% increase in budget compared to the previous RIs' allocation, from €2.4 billion to **€10.9 billion**.
- The "Widening Participation and Spreading Excellence" (WIDERA) from the former WIDERA standalone pillar sees a +58% increase, reaching €5.4 billion.

## Comparison of Horizon Europe (HE) and Horizon Europe 2.0 Budget and Structure

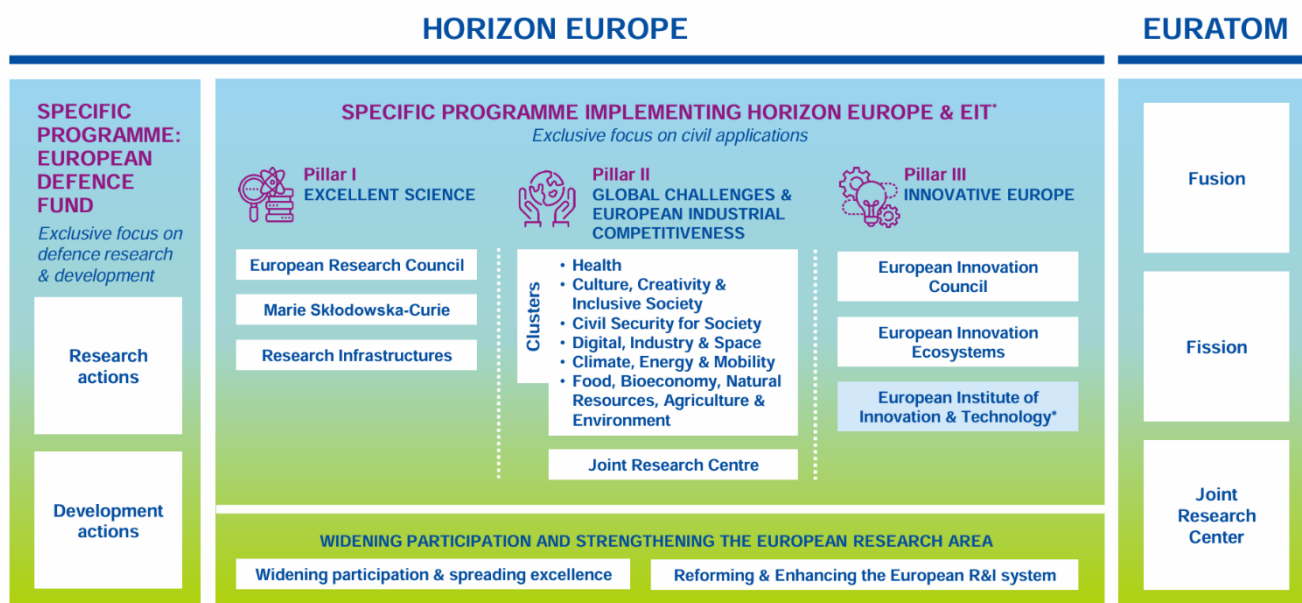
Please note that the figures *in blue* are not included in the official EC regulation and should therefore be considered indicative only.

Horizon Europe <i>Budget</i> (M€) under MFF 2021-2027			Horizon Europe 2.0 <i>Budget</i> (M€) under MFF 2028-2034			HE vs HE 2.0		
Structure	Budget	% Total Budget	Structure	Budget	% Total budget	+/- (M€) HE vs 2.0	% Increase compared to HE	
<b>Pillar I:</b> Excellent Science	<b>25 000 €</b>	<b>26%</b>	<b>Pillar I:</b> Excellent Science	<b>44 079 €</b>	<b>25.2%</b>	<b>+ 19 079 €</b>	<b>+ 76%</b>	
ERC	16 000 €	17%	ERC	31 500	18%	+ 15 500 €	+ 97%	
MSCA	6 600 €	7%	MSCA	10 000	5.7%	+ 4 400 €	+ 67%	
RIIs	2 400 €	3%	RIIs moved to Pillar IV					
			Science for EU Policies	No dedicated budget				
			Joint Research Centre (JRC) – moved from Pillar II	2 600 €	1.5%	+ 630 €	+ 32%	
<b>Pillar II:</b> Global Challenges & EU Industrial Competitiveness	<b>53 516 €</b>	<b>56%</b>	<b>Pillar II:</b> Competitiveness & Society	<b>75 876 €</b>	<b>43.4%</b>	<b>+ 22 360 €</b>	<b>+ 42%</b>	
CL5: Climate, Energy & Mobility	15 123 €	16%	C O M P E T	Clean Transition and Industrial Decarbonisation	25 331 €	14.5%	+ 10 208 €	+ 67%
CL1: Health	8 246 €	9%		Health, Biotech, Agriculture and Bioeconomy	19 650 €	11.2%	+ 2 452 €	+ 14%
CL6: Food, Bioeconomy, Natural Resources	8 952 €	9%						
CL4: Digital, Industry & Space	15 349 €	16%		Digital leadership	16 854 €	9.6%	+ 1 505 €	+ 10%
CL3: Civil Security for Society	1 596 €	2%		Resilience and Security, Defence Industry and Space	6 435 €	3.7%	+ 4 839 €	+ 303%
Total CL 1,3,4,5,6	49 266 €	51%		Total "Competitiveness"	68 270 €	39%	+ 19 004 €	+ 39%
CL2: Culture, Creativity & Inclusive Societies	2 280 €	2%	S O C I E T Y	Global Societal Challenges	.	.	.	.
EU Missions	Clusters are including a budget for Missions			EU Missions	.	.	.	.
New European Bauhaus Facility				.	.	.	.	
				Total "Society"	7 606 €	4.3%		
JRC	1 970 €	2%	JRC budget moved to Pillar I					
<b>Pillar III:</b> Innovative Europe	<b>13 600 €</b>	<b>14%</b>	<b>Pillar III:</b> Innovation	<b>38 785 €</b>	<b>22.2%</b>	<b>+ 25 185 €</b>	<b>+ 185%</b>	
EIC	10 073 €	11%	EIC	34 500 €	20%	+ 24 427 €	+ 242%	
EIE	527 €	1%	Innovation Ecosystems and the Knowledge Triangle	4 285 €	2%	+ 758 €	+ 21%	
EIT	3 000 €	3%						
<b>WIDERA</b>	<b>3 400 €</b>	<b>4%</b>	<b>Pillar IV:</b> ERA	<b>16 262 €</b>	<b>9.3%</b>	<b>+ 12 862 €</b>	<b>+ 378%</b>	
			ERA Policies	No dedicated budget				
RIIs under Pillar I with 2 400 M€			RTIs	10 875 €	6.2%	+ 8 475 €	+ 353%	
Widening	2 960 €	3%	Widening Participation and Spreading Excellence	5 387 €	3.1%	+ 1 987 €	+ 58%	
Reforming	440 €	0.5%						
<b>HE Total</b>	<b>95 516 €</b>		<b>HE 2.0 Total</b>	<b>175 002 €</b>		<b>+ 79 486 €</b>	<b>+ 83%</b>	

## Annex 1 - Architecture Overview

For clarity, this page presents a structural synthesis of Horizon Europe and Horizon Europe 2.0.

### Horizon Europe (2021-2027)



\* The European Institute of Innovation & Technology (EIT) is not part of the Specific Programme



### Horizon Europe 2.0 (2028-2034)

With a proposed **€175 billion** budget, the new programme will be based on four pillars.



<sup>1</sup> Consistent with activities under the European Competitiveness Fund

## Annex 2 - Horizon Europe 2.0: Full Budget table overview

Please note that the figures *in blue* are not included in the official EC regulation and should therefore be considered indicative only.

Horizon Europe 2.0: EC Proposed Regulation (16.07.2025)				
Structure		Budget (M€)	+/- Compared to HE 2021-2027(M€)	% Increase compared to HE
<b>Pillar I: Excellent Science</b>		<b>44 079 €</b>	<b>+ 19 079 €</b>	<b>+ 76%</b>
ERC		31 500 €	+ 15 500 €	+ 97%
MSCA		10 000 €	+ 4 400 €	+ 67%
Science for EU Policies		No dedicated budget		
Joint Research Centre (JRC)		2 600 €	+ 630 €	+ 32%
<b>Pillar II: Competitiveness &amp; Society</b>		<b>75 876 €</b>	<b>+ 22 360 €</b>	<b>+ 42%</b>
C O M P E T	Clean Transition and Industrial Decarbonisation	25 331 €	+ 10 208 €	+ 67%
	Health, Biotech, Agriculture and Bioeconomy	19 650 €	+ 2 452 €	+ 14%
	Digital leadership	16 854 €	+ 1 505 €	+ 10%
	Resilience and Security, Defence Industry and Space	6 435 €	+ 4 839 €	+ 303%
	<b>Total Pillar II "Competitiveness"</b>	<b>68 270 €</b>	<b>+ 19 004 €</b>	<b>+ 39%</b>
S O C	Global societal challenges			
	EU Missions			
	New European Bauhaus Facility			
	<b>Total Pillar II "Society"</b>	<b>7 606 €</b>		
<b>Pillar III: Innovation</b>		<b>38 785 €</b>	<b>+ 25 185 €</b>	<b>+ 185%</b>
EIC		34 500 €	+ 24 427 €	+ 242%
Innovation Ecosystems and the Knowledge Triangle		4 285 €	+ 758 €	+ 21%
<b>Pillar IV: European Research Area</b>		<b>16 262 €</b>	<b>+ 12 862 €</b>	<b>+ 378%</b>
ERA Policies		No dedicated budget		
Research and Technology Infrastructures		10 875 €	+ 8 475 €	+ 353%
Widening Participation and Spreading Excellence		5 387 €	+ 1 987 €	+ 58%
<b>Total</b>		<b>175 002 €</b>	<b>+ 79 486 €</b>	<b>+ 83%</b>

### EARTO - European Association of Research and Technology Organizations

Founded in 1999, EARTO promotes RTOs and represents their interest in Europe. EARTO network counts over 350 RTOs in more than 31 countries. EARTO members represent 150,000 highly-skilled researchers and engineers managing a wide range of innovation infrastructures.

### RTOs - Research and Technology Organizations

From the lab to your everyday life. RTOs innovate to improve your health and well-being, your safety and security, your mobility and connectivity. RTOs' technologies cover all scientific fields. Their work ranges from basic research to new products and services' development. RTOs are non-profit organizations whose core mission is to produce, combine and bridge various types of knowledge, skills and infrastructures to deliver a range of research and development activities in collaboration with public and industrial partners of all sizes. These activities aim to result in technological and social innovations and system solutions that contribute to and mutually reinforce their economic, societal and policy impacts.

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