

OVERVIEW OF ESTONIA'S PARTICIPATION IN THE EUROPEAN UNION FRAMEWORK PROGRAMME

Horizon Europe

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Introduction

The European Union (EU) research and innovation Framework Programme is the largest and most influential source of external funding for Estonian research and offers abundant opportunities for international research cooperation across all scientific fields. In Estonia, the Framework Programme is coordinated by the Estonian Research Council (ETAG) through its [network](#) of consultants (National Contact Points, hereinafter NCPs).

EU Framework Programmes run for seven years. The current, ninth Framework Programme called Horizon Europe (HEU) covers 2021–2027. The results of the first four years of calls are published, allowing interim conclusions to be made.

To date, 579 calls have been held under Horizon Europe, allocating EUR 48.5 billion, i.e. 51% of the planned budget.

This overview uses the European Commission's eCORDA database as at 11/08/2025, and ETAG's database on Estonian organisations' participation in partnerships at [osaluskava.etaq.ee](#). As the eCORDA database lacks information on partnerships, partnership data are not reflected in the general section of this overview. The eCORDA database also does not contain, and this overview therefore does not reflect, data on grants from the European Institute of Innovation and Technology (EIT).

Estonian organisations' participation in Horizon Europe in figures:

- ▶ **EUR 286 million** in funding has been awarded to Estonian organisations
- ▶ **219 Estonian organisations** have received funding
- ▶ **598 grant agreements** have been signed
- ▶ **34%** of the funding has gone to Estonian companies
- ▶ **10 European Research Council (ERC) grants** have come to Estonia (in addition, 5 ERC proposals have received a positive evaluation decision and their grant agreements are being concluded)
 - ▶ **21%** of funding has been obtained through widening participation measures
 - ▶ **38 Estonian organisations are in a coordinator/lead** partner role.

Estonia's participation in Horizon Europe by fields and instruments

Estonian applicants have taken part in **370 Horizon Europe calls**. A total of **2,974 proposals including Estonian organisations** have reached evaluation, of which **598 have resulted in signed grant agreements**. For comparison, under the previous Framework Programme "Horizon 2020" Estonia's organisations obtained 699 projects in total.

Proposals with Estonian participants **are of high quality** - **1,914 proposals, or 64% of those evaluated**, passed the quality threshold. Of these, 560 received a positive funding decision and 234 proposals with Estonian participation were placed on the reserve list.

The success rate of participations by organisations from EU countries (participations in positively funded proposals as a share of participations in evaluated proposals) ranges between 23% and 15%. **The success rate for Estonian participants is 18.1%**, currently slightly below the EU-27 average (19.1%) but higher than the EU-13 average (17.0%). It should be noted that countries' success rates change over time.

Table 1. Number of proposals and projects with Estonian participation and the funding received in projects, with shares, by Horizon Europe pillars and fields (does not include EU partnership data)

Framework structure	Research area	Number of evaluated proposals	Number of projects	EU net funding for projects	% of total funding
Pillar I: Excellent Science	European Research Council (ERC)	201	10	20,6M€	7,2%
	Marie Skłodowska-Curie Actions	405	66	14,9M€	5,2%
	Research Infrastructures	34	18	3,9M€	1,4%
Pillar II: Global Challenges and European Industrial Competitiveness	Cluster 1: Health	183	56	19,5M€	6,8%
	Cluster 2: Culture, Creativity and Inclusive Society	257	51	14,3M€	5,0%
	Cluster 3: Civil Security for Society	182	21	6,6M€	2,3%
	Cluster 4: Digital, Industry and Space	356	69	25,6M€	8,9%
	Cluster 5: Climate, Energy and Mobility	355	71	35,4M€	12,4%
	Cluster 6: Food, Bioeconomy, Natural Resources, Agriculture and Environment	273	75	33,9M€	11,8%
	Missions	172	45	20,9M€	7,3%
Pillar III: Innovative Europe	European Innovation Council (EIC)	229	32	26,1M€	9,1%
	European Innovation Ecosystems (EIE)	98	21	3,8M€	1,3%
	European Institute of Innovation and Technology (EIT) ¹	-	-	-	-
Widening Participation and Strengthening the European Research Area (ERA)	Widening Participation and Spreading Excellence	199	51	59,6M€	20,8%
	Reforming and Enhancing the European R&I System	30	12	1,1M€	0,4%
Total		2974	598	286 M€	100,0%

¹ Ten Estonian institutions have participated in the EIT measure, collectively receiving €7.5 million (€4.3 million from the European Commission and €3.2 million from local KIC funding).

Table 2. EU net funding received in Horizon Europe projects, number of participations and different participants (organisations), and success rate of participations (participations in positively funded proposals as a share of participations in evaluated proposals) by EU Member State

	Country	EU Net Funding	Number of Participants	Number of Institutions	Proposal Success Rate (%)
	European Union	44 067 M€	97 057	24 074	19%
1	Germany	7634 M€	13 166	3191	21%
2	France	5460 M€	10 686	2629	22%
3	Spain	5095 M€	13 005	3048	19%
4	Netherlands	4174 M€	7299	1755	22%
5	Italy	4123 M€	11 075	2529	17%
6	Belgium	3596 M€	6267	1445	23%
7	Greece	1876 M€	5114	1060	17%
8	Sweden	1655 M€	3328	804	18%
9	Austria	1572 M€	3377	850	20%
10	Denmark	1423 M€	2992	659	21%
11	Finland	1374 M€	2785	678	20%
12	Portugal	1141 M€	3319	844	16%
13	Ireland	1022 M€	2189	540	18%

	Country	EU Net Funding	Number of Participants	Number of Institutions	Proposal Success Rate (%)
14	Poland	755 M€	2041	684	17%
15	Czech Republic	562 M€	1597	426	18%
16	Slovenia	385 M€	1215	348	19%
17	Cyprus	342 M€	1028	240	15%
18	Rumania	322 M€	1233	463	16%
19	Estonia	286 M€	774	219	18%
20	Luxembourg	230 M€	539	120	19%
21	Hungary	217 M€	896	315	18%
22	Lithuania	183 M€	624	189	17%
23	Bulgaria	174 M€	698	334	17%
24	Croatia	161 M€	657	296	16%
25	Slovakia	136 M€	495	201	18%
26	Latvia	112 M€	412	135	17%
27	Malta	57 M€	246	72	17%

Estonia is well represented in Pillar II activities of Horizon Europe (primarily cooperation projects across scientific fields) and in Pillar III projects (which are mainly innovation-related). However, compared to the EU as a whole, differences appear in Pillar I (which supports excellent science), where Estonia participates significantly less, and in widening participation measures, where Estonia is more active than the EU overall.

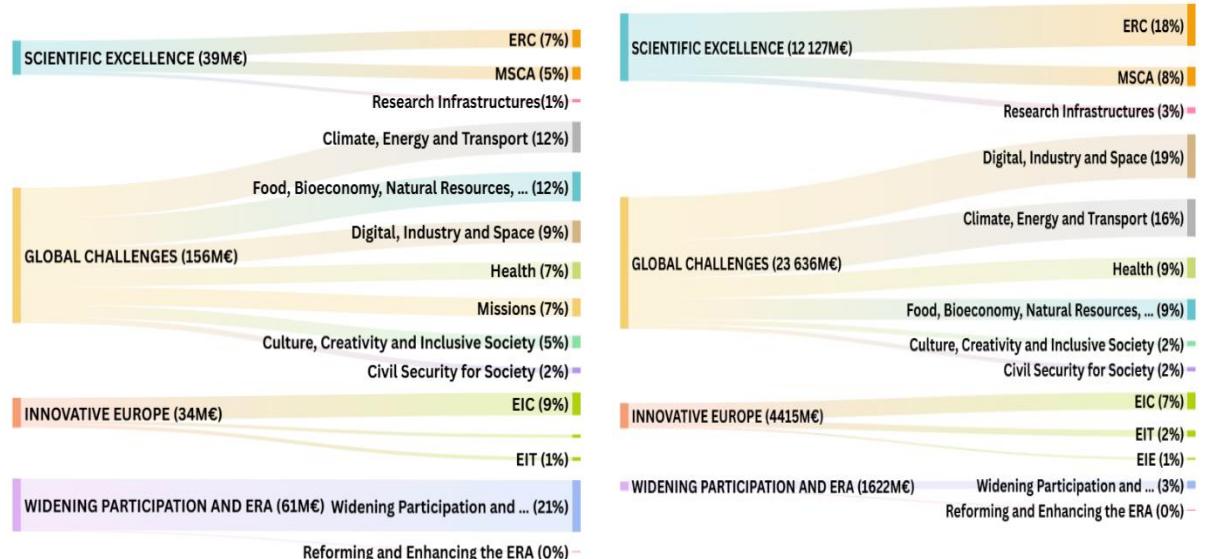


Figure 1. Distribution of EU net funding received in Horizon Europe projects by field, Estonia on the left and the EU as a whole on the right.

Estonia's objectives in the Horizon Europe Framework Programme

In 2021, when Horizon Europe began, the Estonian Research Council formulated objectives to support our efforts. The objectives have helped maintain focus and have supported the design of support measures; they also serve as a benchmark for assessing results. Several key indicators of the TAIE development plan are linked to the Framework Programme's objectives.

Five objectives were set with the understanding that, compared with other countries, Estonian applicants have been very successful and competitive in previous Framework Programmes. One objective was therefore to maintain and support this high level. At the same time, several areas of untapped potential were identified.

- Compared to other countries, relatively fewer frontier-science (European Research Council, ERC) grants have come to Estonia. A relatively large share of projects had received funding from widening participation measures.
- Statistics also showed that Estonian organisations were rather seldom in a coordinator role (project lead) in large cooperation projects and more often participated as regular partners.
- Horizon Europe introduced many opportunities for participation by different types of organisations. Alongside universities and research organisations, a wide variety of organisations and companies are expected to participate. The objective is to encourage applications also from those with no previous application experience.
- In addition to benefiting from the Framework Programme, whether in terms of new knowledge, cooperation contacts or funding, it is important for us as a country to contribute via the Framework Programme to the achievement of common goals. EU partnerships and missions provide opportunities for this.

With these objectives in mind, ETAG has designed all its measures to support participation in the Framework Programme: in addition to various trainings, information and consulting services, also financial support measures - pre-proposal support for applicants, support for participation in partnerships, various supports for applying for an ERC grant, MSCA COFUND support, a support measure for participation in Horizon Europe partnership events, and a support measure for involving experts in the pre-screening of Horizon Europe proposals.

Objective I: Maintain Estonia's current level in Framework Programme calls

Framework Programme budgets have grown steadily over time. The total budget of the previous Framework Programme "Horizon 2020" (H2020) was EUR 79 billion; the budget of Horizon Europe is EUR 93.5 billion, so it is logical that the amount coming to Estonia also increases. **The share of overall Framework Programme funding obtained by Estonian**

organisations has also risen. Estonia's share of the funding awarded under H2020 was 0.40%; in Horizon Europe this indicator is currently 0.59%.

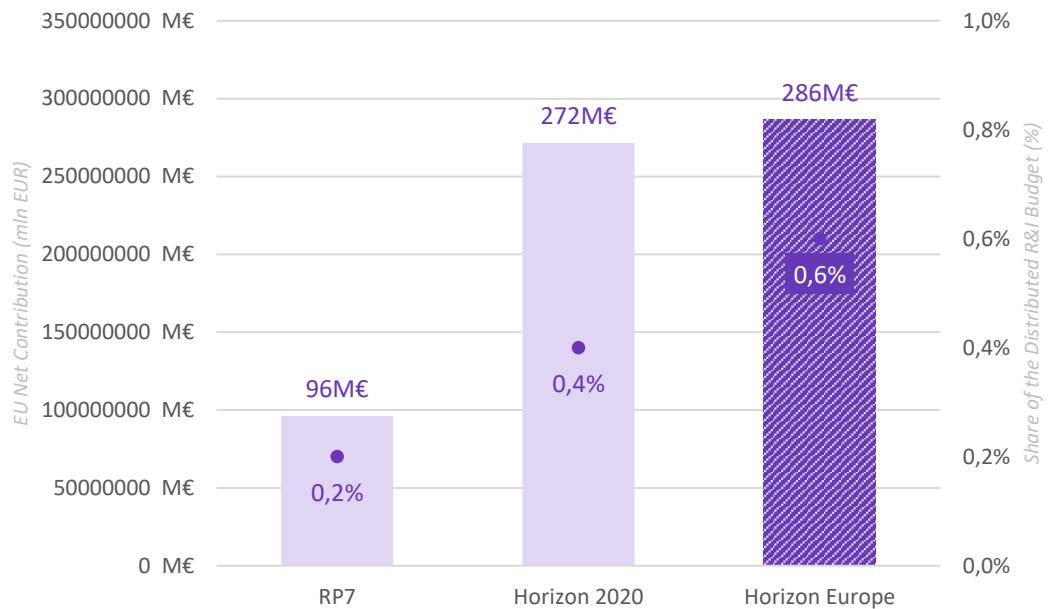


Figure 2. EU net funding received by Estonian organisations by Framework Programme and its share of total EU net funding. The Horizon Europe column is hatched because the programme is still ongoing.

To better compare Estonia's results with other EU Member States, EU net funding received by Estonia is examined relative to GDP and population. The objective is to remain among the top five when ranked by GDP. **Comparing the EU net funding received by Estonian participants in Horizon Europe projects with other EU countries, Estonia ranks 3rd by GDP and 7th by population.** For comparison, at the end of the previous Framework Programme (2020) Estonia ranked 3rd among EU countries by GDP.

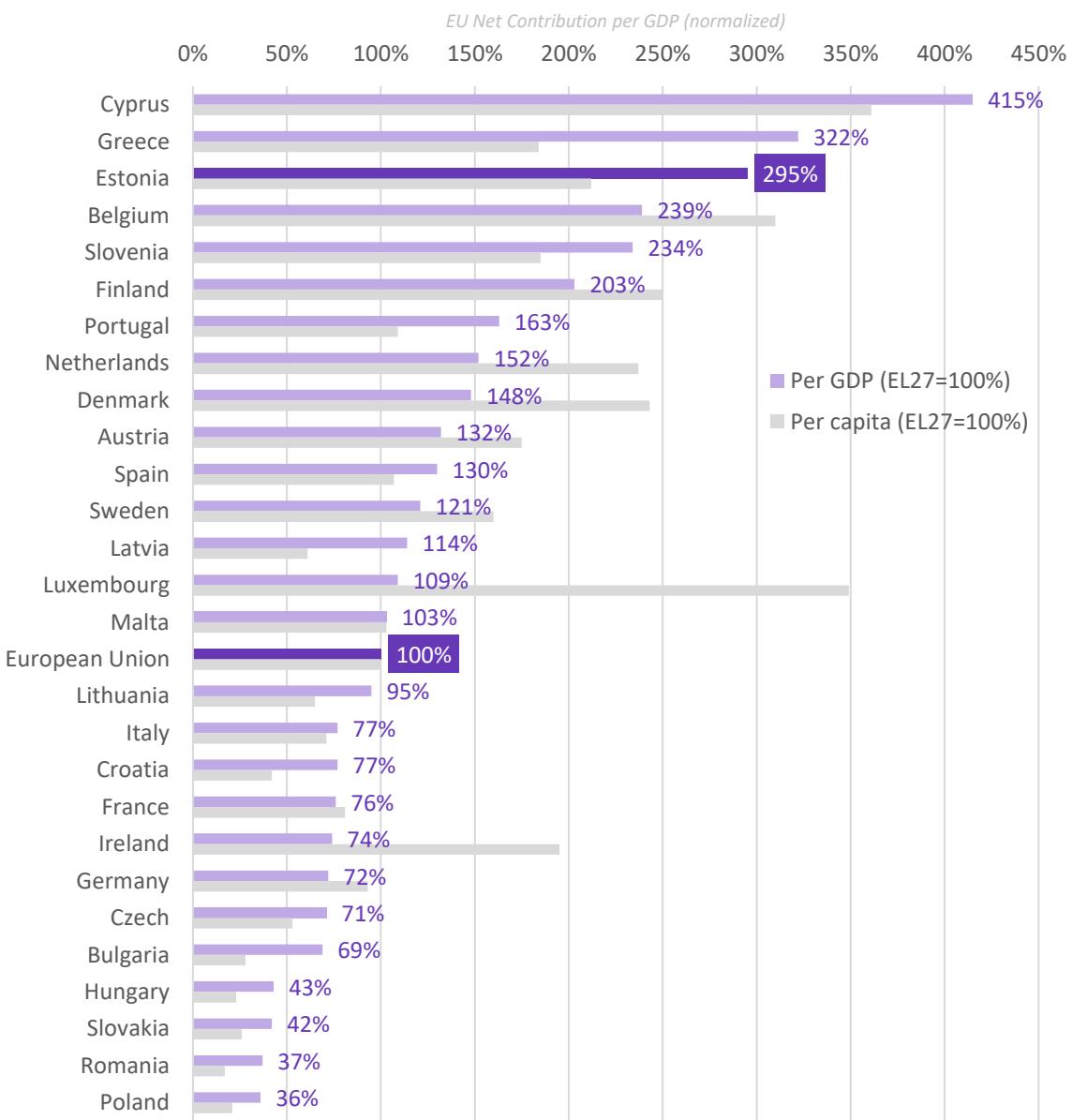


Figure 3. EU net funding per GDP and per capita received in Horizon Europe projects by EU country, compared with the EU-27. Eurostat 2024 GDP and population data used (last updated 26/08/2025)

During the current Framework Programme, positive funding decisions amounting on average to EUR 86 million per year have reached Estonia. Most projects last about three years.

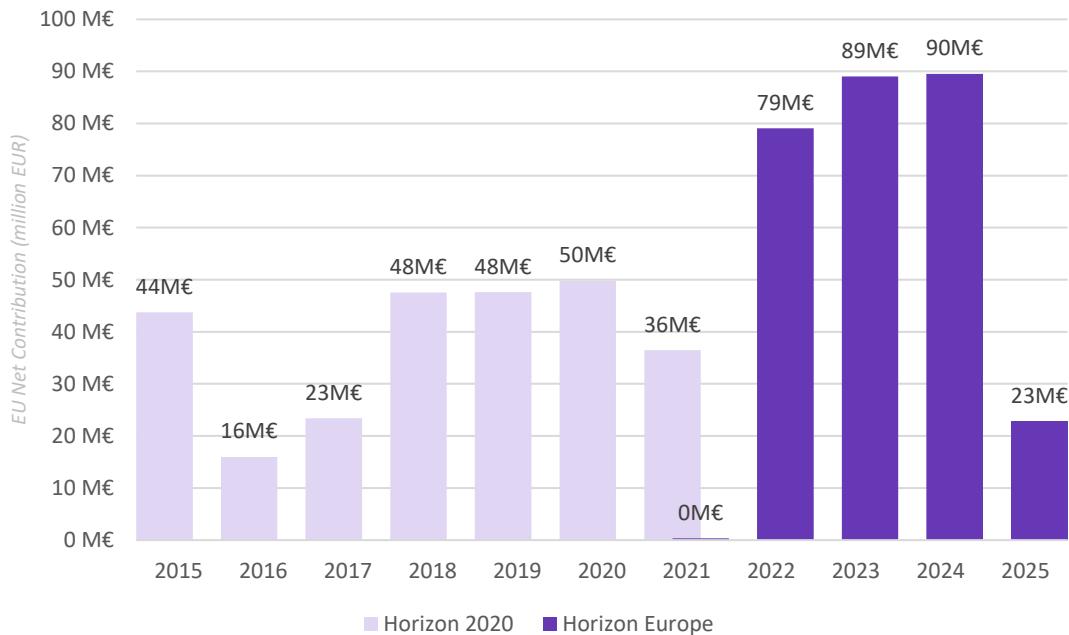


Figure 4. EU net funding received in Horizon Europe projects by grant-agreement signature date, by Framework Programme

The Framework Programme is financed from the EU's common budget, to which countries contribute based on GDP. In the current EU long-term budget, the Framework Programme accounts for about 8%.² Estonia's share in the current cycle is about EUR 372 million per year³, which implies Estonia's notional contribution to Horizon Europe of roughly EUR 30 million per year. **Thus, it can be said that every euro the state pays into the Framework Programme returns almost threefold.**

Objective II: Broaden the circle of participants in the Framework Programme

Horizon Europe expects participation by different types of organisations: in addition to research organisations and universities, companies, government agencies, civil society organisations, museums, hospitals, local authorities, professional associations, and others can participate. In some calls it is mandatory or strongly recommended to include partners with different types of expertise - companies, end-users, or representatives of other stakeholders.

Among Estonian applicants there are presently 725 different organisations, which have participated in proposals a total of 3,922 times. Among project participants there are **219 different organisations**, appearing 774 times in participant lists.

Estonian participants have received EU net funding of EUR 286 million, of which EUR 154 million has gone to higher education and research institutions. The share of funding going to Estonian companies is 34%, which is higher than the EU average (27%). Most participating

² <https://op.europa.eu/et/publication-detail/-/publication/d3e77637-a963-11eb-9585-01aa75ed71a1>

³ <https://www.fin.ee/sites/default/files/documents/2025-07/Eesti%20ja%20EL%20eelarve.pdf>

Estonian companies are small and medium-sized enterprises, SMEs account for 70% of company participations in proposals and 77% of company participations in projects.

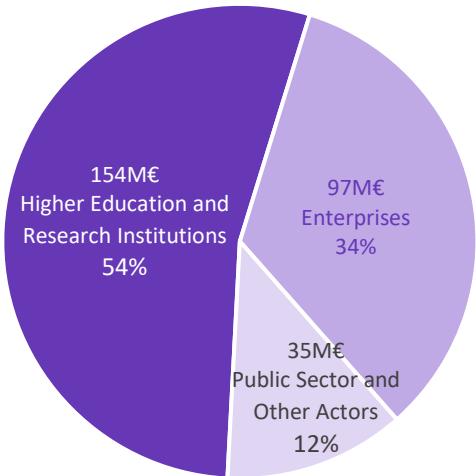


Figure 5. Share of EU Net Contribution to Estonia from Horizon Europe projects, by type of institution

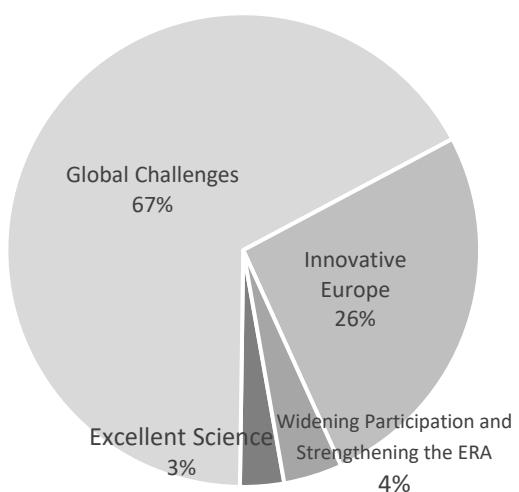


Figure 6. EU Net Contribution received by Estonian enterprises under the pillars of Horizon Europe

The most active applicants among Estonian organisations are the University of Tartu, Tallinn University of Technology, Tallinn University and the Estonian University of Life Sciences. The ranking of EU net funding received in projects also includes several companies participating in higher-budget projects.

Alongside universities and research institutions, many cities - e.g. Tartu and Tallinn and other local authorities as well as other public-sector bodies (e.g. Harno, the Police and Border Guard Board, and the National Institute for Health Development) have received funding from "Horizon Europe." Several universities of applied sciences, e.g. the Estonian Academy of Security Sciences and Tallinn University of Applied Sciences - also implement Horizon Europe projects. Hospitals (e.g. Tartu University Hospital, North Estonia Medical Centre), professional associations (e.g. the Estonian Maritime Cluster, the Estonian Dental Association) and other associations (e.g. MTÜ Kodukant Läänemaa, the Union of Cooperative Housing Associations) have also received support. From the cultural sector, successful projects include, for example, the Tallinn Black Nights Film Festival, the Estonian National Museum and the Estonian Maritime Museum.

Newcomers, i.e. organisations not found among H2020 grant recipients but which have received funding in Horizon Europe, number around 130. These are mainly companies, but over 20 of them are other types of organisations, such as NGOs, museums and other civil-society organisations.



Figure 7. The 15 most successful Estonian organisations by EU net funding received in Horizon Europe projects. The Estonian Research Council's projects are related to NCP networks, mandatory participations in partnerships co-funded by ETAG, and similar activities

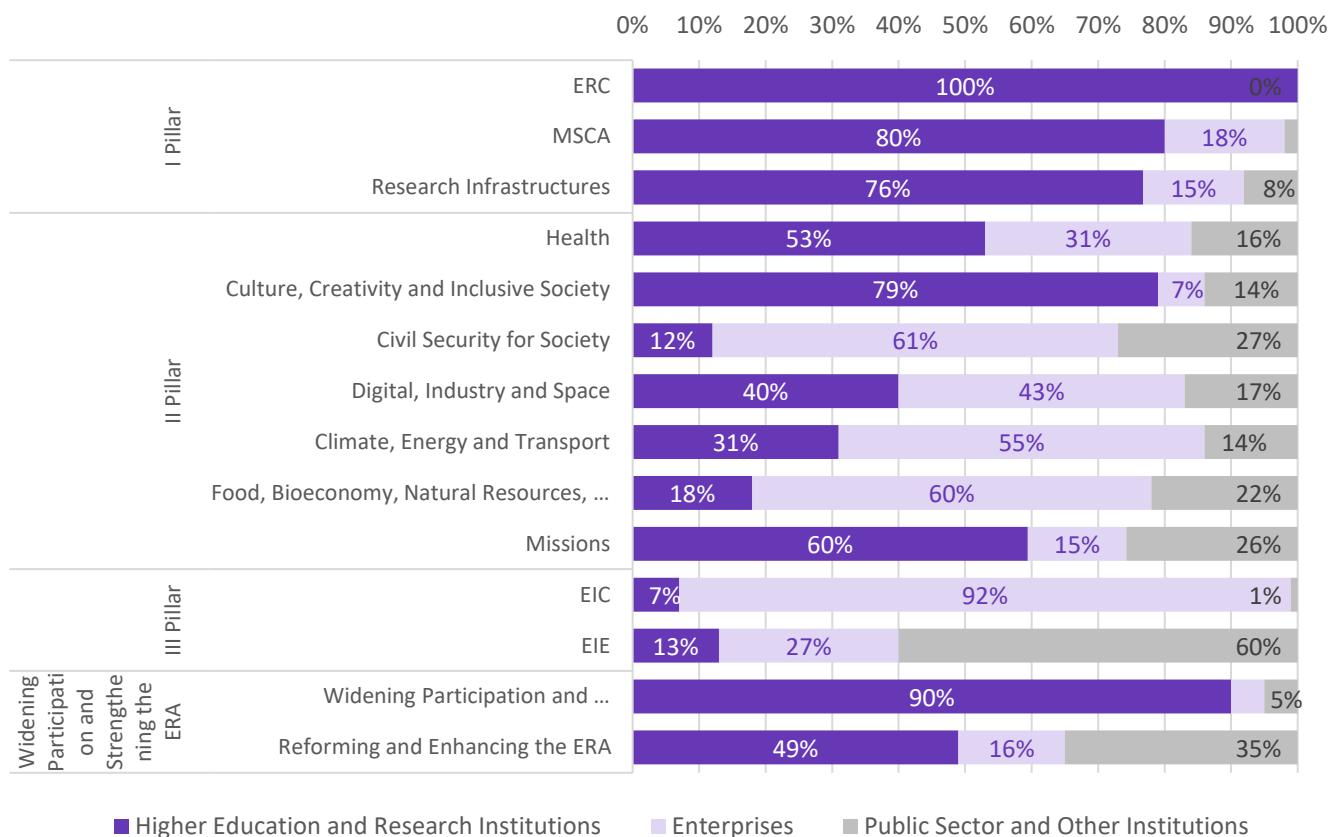


Figure 8. Share of EU net funding received by Estonian organisations in Horizon Europe projects by type of organisation across fields

The funding scheme also influences participant diversity by organisation type. Figure 8 shows the different target groups of Horizon Europe measures: research organisations dominate in Pillar I excellent-science projects and in the widening participation part aimed at strengthening the European Research Area; companies and other organisations dominate in Pillar III, which is oriented towards innovation. By contrast, Pillar II topic-based calls, driven by predefined research and development tasks, feature a much more diverse circle of participants: large consortium projects are funded here, which, in addition to researchers and innovators, also require the involvement of target and stakeholder groups. At the same time, the typical circle of participants within this pillar also varies depending on the thematic cluster focus. The closer the research questions are to basic science, the more successful projects involve universities and, as representatives of target groups, the public sector (e.g. in the “Culture, Creativity and Inclusive Society” cluster focusing on social sciences and humanities). Conversely, the more technically oriented and user- and market-proximate (i.e. higher Technology Readiness Levels) the innovation expected in a cluster’s calls, the more companies are involved in successful projects (e.g. in the “Civil Security for Society” cluster). The circle of participants is particularly diverse in EU mission projects, since compared with the rest of Pillar II, mission calls place an even stronger emphasis on bringing together different types of participants. Missions are a new instrument in Horizon Europe, intended to influence national policies, regulations, standards and practices in addressing various problems; therefore, end-users and other target and stakeholder groups are often involved in research and development. (See also p. 17 for missions.)

Objective III: Participate in calls in a leadership role

Coordinating a consortium project implemented in cooperation between many countries offers the opportunity to have a greater say in team formation, in defining project content and in implementation. In Estonia, the share of coordinated cooperation projects out of all projects with Estonian participation is rather average or low, and there is potential to increase the number of projects where we are in a leadership role.

At the same time, coordinating a consortium is a challenge that presupposes the existence of a support team and specific skills. ETAG supports taking on the coordinator role both financially and through a dedicated [coordinators’ development programme](#) launched in 2025.

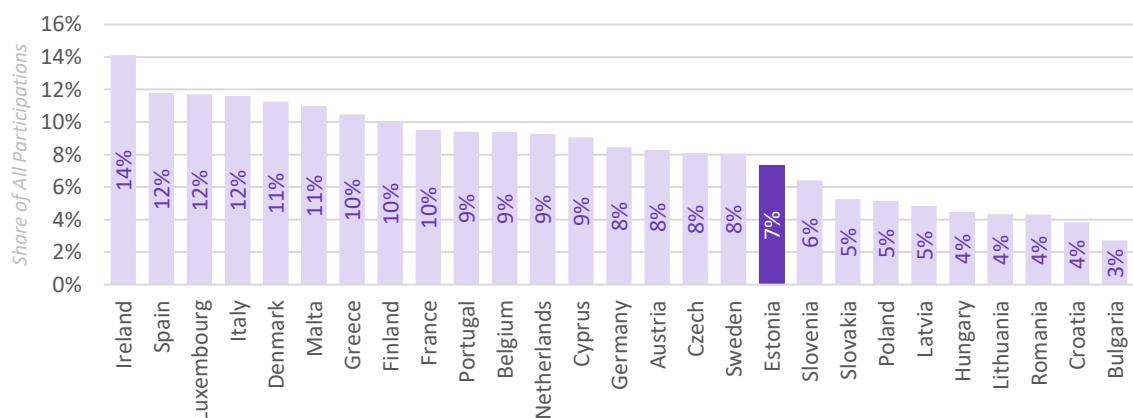


Figure 9. Share of participations as a consortium project coordinator in Horizon Europe out of all participations, by EU Member State. A consortium project here is any project with more than one participant

Among project participants there are 219 different organisations in total; of these, 38 different organisations have acted as a coordinator at least once. Altogether, Estonian organisations have coordinated 102 projects, including individual-beneficiary projects (e.g. ERC and EIC projects).

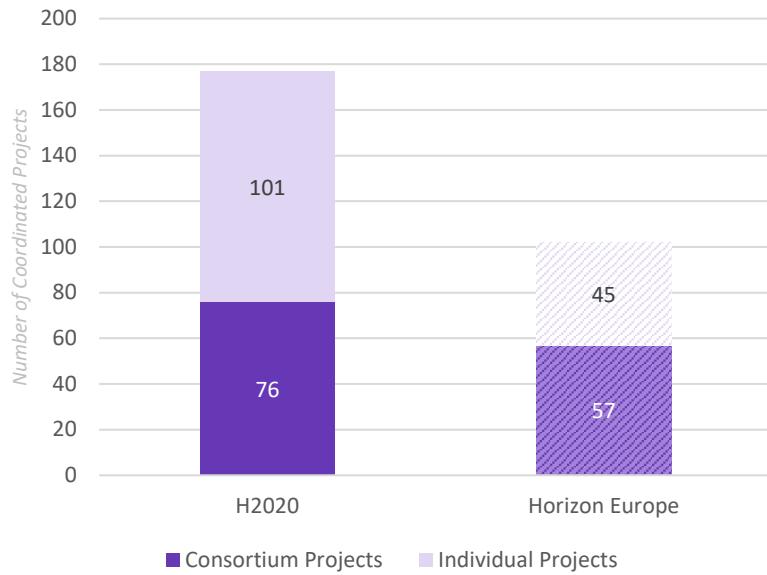


Figure 10. Number of projects coordinated by Estonian organisations in H2020 and “Horizon Europe .” A consortium project is any project with more than one participant

Objective IV: Compete successfully in frontier-science calls

The European Research Council (ERC) supports frontier research - fresh scientific ideas with novel and innovative approaches in new research fields.

Like other newer EU Member States, Estonia has been less successful than Western Europe in applying for ERC grants. Estonian researchers are active applicants; however, Estonia’s current success still lags behind the EU average.

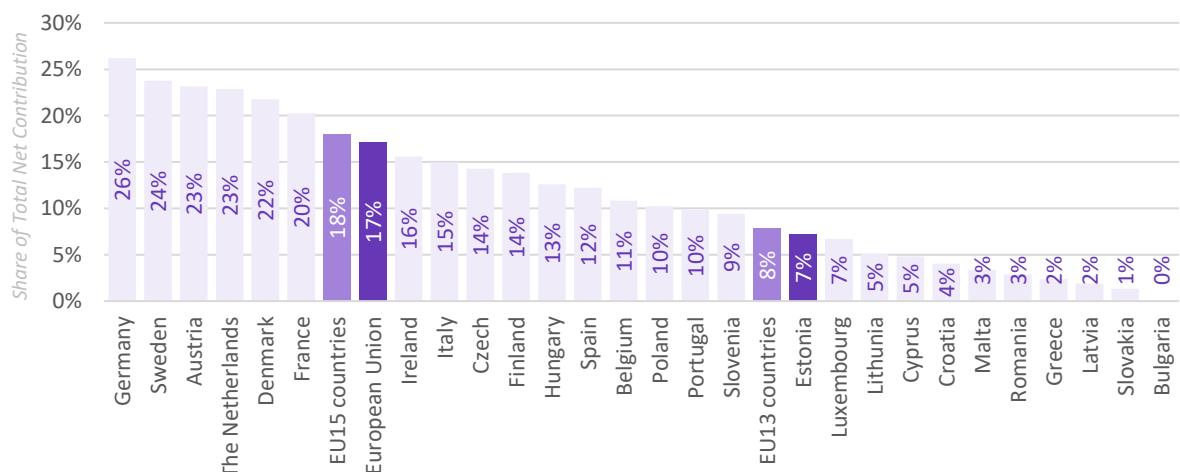


Figure 11. Share of ERC grants in total EU net funding received in Horizon Europe by EU Member State

In recent years, Estonia's application activity and success have increased thanks to national and institutional support measures. In H2020, Estonian researchers submitted 179 proposals, seven of which were successful. In Horizon Europe Estonian researchers have already submitted 201 proposals and obtained 15 ERC grants. Year by year, the share of funding from the "Excellent Science" pillar has grown, from 4% in the early years of the programme to 12% in the current accounting.

Participation in MSCA measures has not grown at the expected pace after ETAG's incoming postdoctoral scheme was linked to the MSCA Seal of Excellence system. A positive boost, however, has been provided by the launch in 2025 of the MSCA COFUND support measure for doctoral programmes.

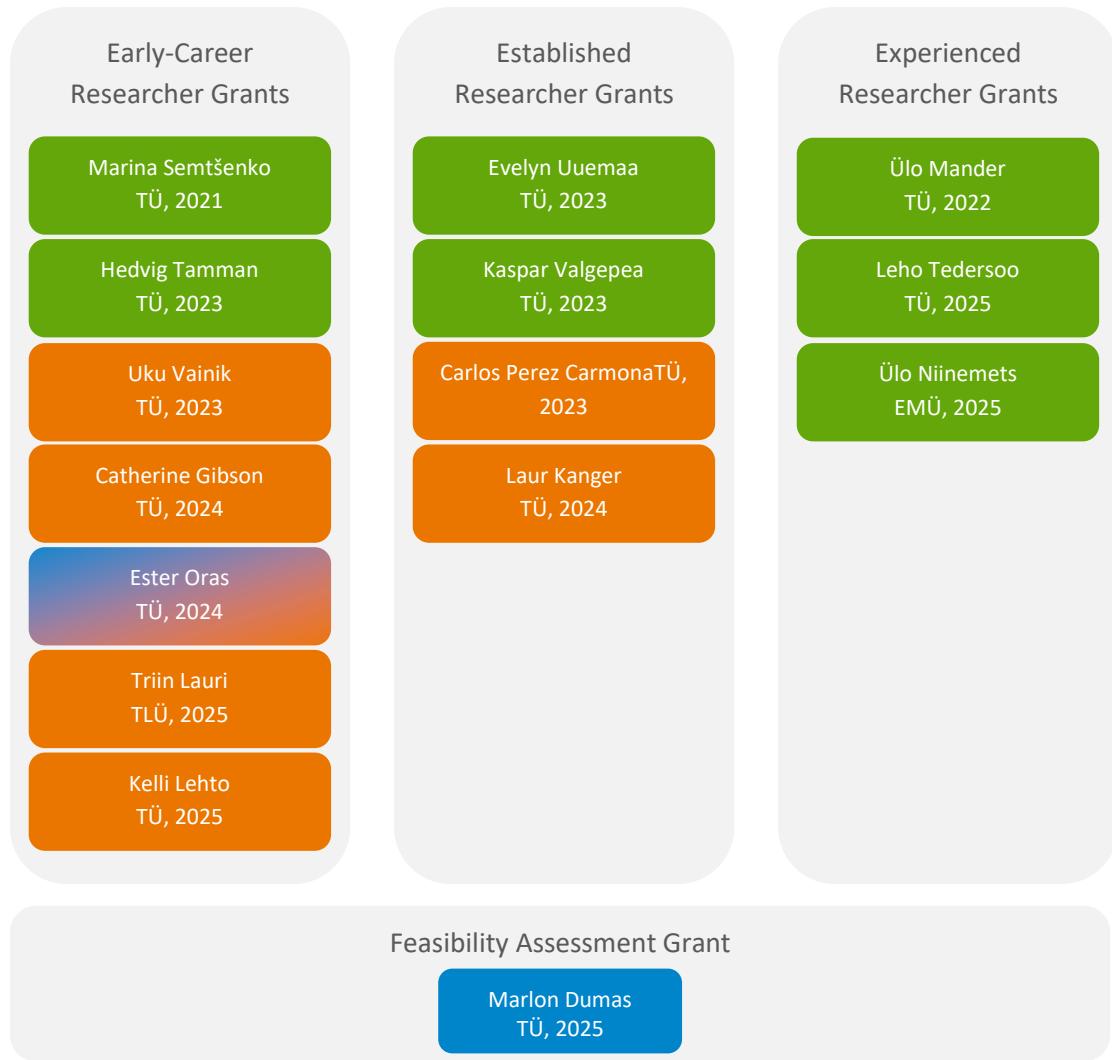


Figure 12. ERC grants coordinated by Estonian organisations in "Horizon Europe ." **Green boxes** indicate bio- and environmental-science projects, **orange** denote social sciences and culture, **blue** denote natural sciences and engineering)

Objective V: Contribute to EU partnerships and missions

An EU co-funded partnership is a form of inter-country cooperation for the strategic planning of research and the joint funding of transnational research cooperation. Unlike the rest of the Framework Programme, the specific feature of research funding here is that each country

funds the participation of its own researchers in a successful cooperation project. In some cases, the European Commission adds co-funding. Funding decisions are made in competitive calls, and there may be multiple funders per participating country. ETAG's participation has required ministerial support or a financial contribution that ETAG leverages.

ETAG participates as a funder **in 16 Horizon Europe co-funded partnerships**. In addition, ETAG continues to fund research cooperation projects launched from joint ERA-NET calls in previous Framework Programmes. ERA-NETs were the predecessors of Horizon Europe co-funded partnerships, and nearly ten of them remain active. As of August 2025, **a total of 58 ERA-NET and EU co-funded partnership projects** with ETAG funding are underway, **with 11 Estonian organisations participating**. To date, the total amount of funding decisions for partnership projects is EUR 4.1 million (ETAG funding since the start of Horizon Europe i.e. since 2021). This is complemented by EUR 1.3 million of EC co-funding.

In addition to ETAG, sectoral ministries also fund partnerships and ERA-NET cooperation projects: chiefly the Ministry of Climate and the Ministry of Regional Affairs and Agriculture, but also the Ministry of Social Affairs and the Ministry of Economic Affairs and Communications. The full list of partnerships and descriptions of their content and activities can be found at osaluskava.etag.ee.

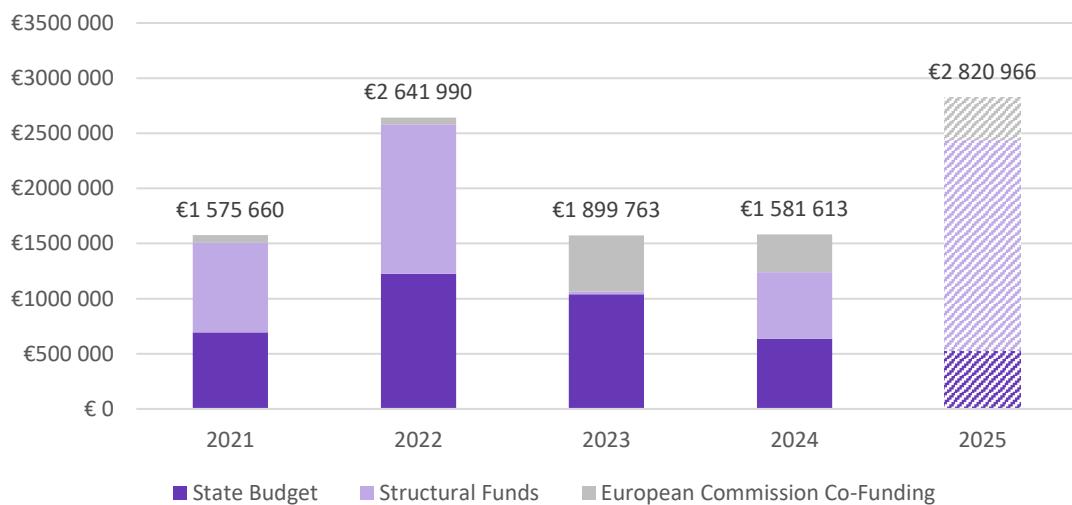


Figure 13. Size of the Estonian Research Council's partnership-support budgets by source over the years

The most active participants in partnership projects are, as expected, universities: the University of Tartu, Tallinn University of Technology, Tallinn University and the Estonian University of Life Sciences. The participant list also includes several public-sector bodies and companies.



Figure 14. Estonian organisations participating in ongoing partnership projects supported by ETAG, by funding received

As shown in Figure 15, the largest number of projects with ETAG co-funding are in multidisciplinary partnerships, medical and health sciences, and engineering and technology. The field distribution of partnerships is indicative, because both the partnerships themselves and their calls often require an interdisciplinary approach. For example, in engineering and technology, the partnership [“CET: Clean Energy Transition.”](#) through which most Estonian-participation projects have received funding, ranges from specific energy solutions to the economic and social dimensions of the clean-energy transition. The ERA-NET [“CHANSE: Collaboration of Humanities and Social Sciences in Europe”](#) and the EU partnership [“DUT: Driving Urban Transitions”](#) are referred to as multidisciplinary initiatives in Figure 15 because they cross Frascati field boundaries more than others: CHANSE focuses equally on the humanities and social sciences, and DUT requires cross-disciplinary participation by fields dealing with urban innovation.

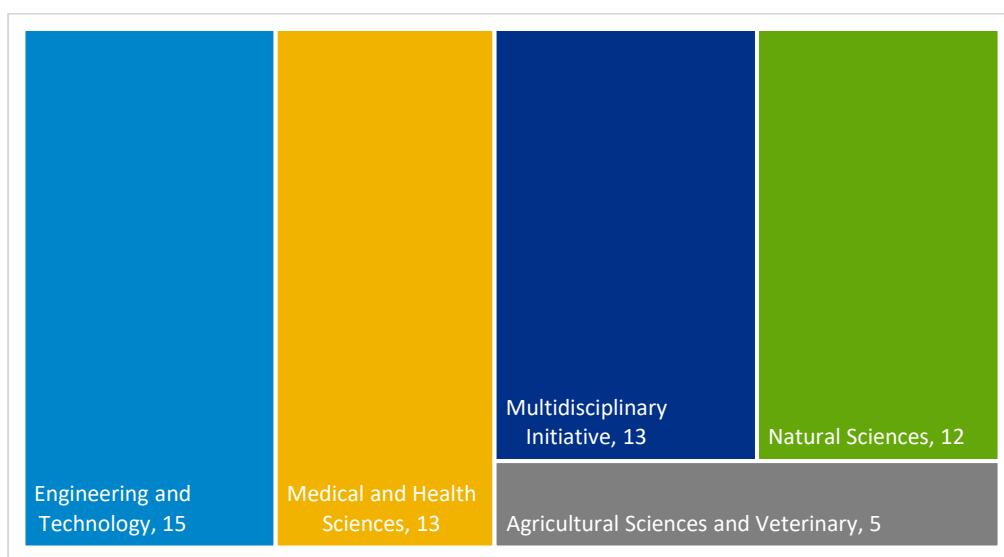


Figure 15. Field distribution of ongoing projects with ETAG funding

From 2021 to 2025, the Ministry of Climate's funding-decision budget is about EUR 1.4 million, plus EUR 146,000 of EC co-funding. Over the same period, the Ministry of Regional Affairs and Agriculture's funding-decision budget is about EUR 1.9 million, plus EUR 135,000 of EC co-funding; the Ministry of Social Affairs has EUR 300,000 plus EUR 139,000 of EC co-funding; and the Ministry of Economic Affairs and Communications has EUR 850,000.

A significant change in partnership funding took place at the beginning of 2024: whereas previously an Estonian participant's project budget in a partnership could be up to EUR 150,000, from partnership calls announced in 2024 onwards the applicant's budget **as consortium lead (coordinator) may be up to EUR 300,000**. The aim is to motivate Estonian applicants to take on a leadership role more often. Until now, the number of projects coordinated by Estonian participants in partnerships has averaged one per year. As about a year to a year and a half elapses from the announcement of a call to funding decisions and the start of funded projects, it will be possible at the end of 2025 to assess whether the measure has had a positive effect.

Another instrument intended to steer countries to engage more systematically with specific fields in Horizon Europe is the set of [EU missions](#). Missions have ambitious objectives and are expected to deliver concrete results by 2030. To date, 45 projects and EUR 21 million have been brought to Estonia from calls held in mission areas, involving a total of 32 different organisations.

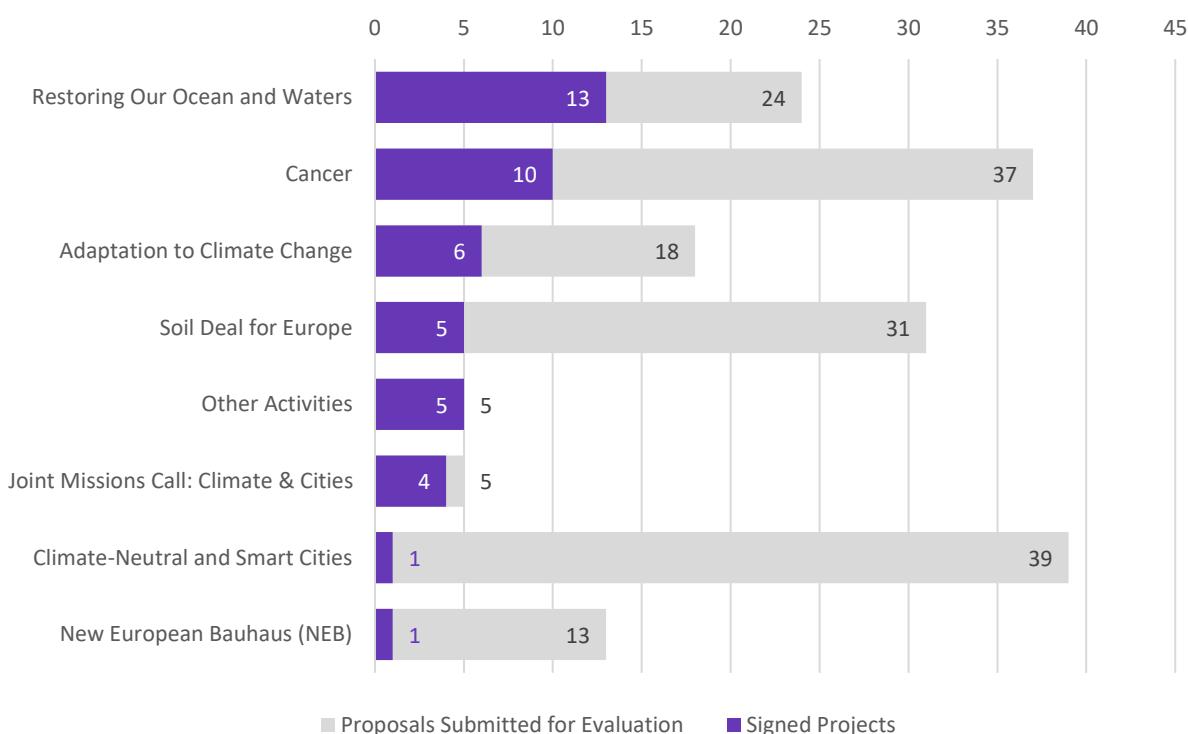


Figure 16. Number of proposals and projects with Estonian participation in Horizon Europe mission calls. The category "Other activities" aggregates calls focusing on coordination and horizontal themes

Summary

Estonia has performed very well in the EU research and innovation Framework Programme (FP) Horizon Europe – 286 EUR million in research funding has been brought to Estonia through strong competition, supporting the launch of nearly 600 international projects since 2022. At present, with half of the FP budget still remaining, more support has already been obtained than during the entire previous seven-year FP.

Not only has the volume of funding increased, but the share of the FP total budget coming to Estonia has risen with each programme: in FP7, Estonia's share among all participating countries was 0.2%; in FP8 it was 0.4%; and currently it stands at 0.6%. Comparing the EU net funding received by Estonian participants in Horizon Europe projects with other EU countries, Estonia currently ranks 3rd by GDP and 7th per capita.

The success rate of Estonian organisations is 18.1%, slightly below the EU-27 average (19.1%) but higher than the EU-13 average (17.0%). Although the overall success rate is satisfactory, a negative outlier is the European Research Council (ERC), where the rate is low (7%). This is why ETAG provides comprehensive support for applying for ERC grants. Recently, a series of positive funding decisions have been received in the ERC context, and 15 ERC grants implemented by Estonian organisations are currently underway or about to start, ETAG's various support measures may also have played a role in this.

The profile of participating organisations becomes more diverse with each Framework Programme: alongside research organisations and universities, hospitals, professional associations, civil-society organisations, local authorities and others have also been successful. The share of funding going to Estonian companies is 34%, higher than the EU average (27%). The most successful organisation in Horizon Europe has been the University of Tartu with nearly EUR 90 million. Three other Estonian organisations have received more than EUR 10 million: Tallinn University of Technology (EUR 32.1 million), Fibenol Imavere OÜ (EUR 16.5 million) and Tallinn University (EUR 15 million).

Estonian organisations predominantly act as partners in projects; compared to other countries, the share of coordinated projects out of all projects is rather average or low. In 2025, ETAG increased financial support aimed at coordinators and prepared dedicated trainings, whether these motivate Estonian organisations to take on a leadership role more often can be assessed in the second half of the Programme.

The Estonian state participates in most EU partnerships and co-funds calls held within the partnerships. Partnerships also enable various ministries to contribute to finding solutions to problems in their fields (e.g. agriculture, health, climate, biodiversity, etc.). To date, the total amount of funding decisions for partnership projects since the start of Horizon Europe in 2021 is EUR 4.1 million. This ETAG funding is complemented by EUR 1.3 million of EC co-funding.

Although this statistical overview focuses mainly on financial figures, rankings and comparisons with other countries, the impact of participating in the Framework Programme is much broader: access to top-level research infrastructures and the latest technologies, cooperation with leading experts from other countries and, most importantly, the opportunity to conduct research at the highest level.