

First Edition 2025

# The Battery R&I Funding Handbook



A BEPA Overview of EU Programmes  
and Instruments for the Battery Sector

# Acknowledgments

This document compiles three reports prepared by **BEPA's Policy Task Force**. It reflects the collective effort of BEPA experts contributing to the Task Force's mission of supporting the European battery innovation ecosystem through informed, policy-driven insights. We sincerely thank all members who contributed their expertise, shared experiences, and provided feedback during the drafting and consultation phases.

The Policy Task Force was established to **strengthen the link between EU policy and BEPA members**. Its work is guided by two main objectives.

**First**, to provide timely information to BEPA members on key EU policy developments. The first report in this compilation focuses on the **next Multiannual Financial Framework (MFF)**, announced by the European Commission on **16 July 2025**. It summarises the main elements of the proposal and highlights their relevance for the European battery ecosystem. The report also covers updates on major EU funding programmes announced alongside the MFF, such as the **European Competitiveness Fund (ECF)** and the **next Horizon Europe**, and assesses their



potential impact on research, innovation, and industrial deployment.

**The second objective** of the Policy Task Force is to deliver **briefings and strategic insights on funding mechanisms for battery innovation.**

The other two reports compiled in this document analyse the **Important Projects of Common European Interest (IPCEIs)** and the instruments provided by the **European Innovation Council (EIC)** as funding opportunities supporting technological innovation. These briefings build on the **webinars organised by the Policy Task Force**, where BEPA members exchange views with invited experts on the design, accessibility, and effectiveness of EU funding tools. The insights

collected from these sessions are consolidated into written briefings, which are then circulated among Task Force members to gather feedback and formulate recommendations for improving these instruments.

Through this initiative, **BEPA seeks to ensure that its members remain well-informed and actively engaged in the European policy landscape.** The Policy Task Force acts as a bridge between EU institutions and the battery community, fostering dialogue and helping to improve the policies that shape Europe's battery value chain.

# A guide to the Multiannual Financial Framework 2028–2034: the new EU budget programmes for the battery sector

This document provides a general overview of the next EU long-term budget, comparing its structure and allocations with the current one, and offering a specific perspective on topics relevant to BEPA members and the R&I battery sector. Two brief sections on the European Competitiveness Fund and Horizon Europe have been included to provide additional context. The final section outlines the expected next steps for the new Multiannual Financial Framework (MFF).



## Executive Summary

On 16 July, the Commission presented its proposal for a new EU budget covering the 2028–2034 period. Almost €2 trillion, or 1.26% of the average EU's gross national income (1.12% currently), will support Europe's ambitions and enable the Union to overcome the increasing challenges in security, defence, competitiveness, migration, energy and climate.

The key features of the new EU budget are: greater flexibility across the budget, allowing Europe to act quickly when needed; simpler, more streamlined and harmonised EU financial programmes (from 52 to 16) to ensure easier access to funding; and a boost to Europe's competitiveness to secure supply chains, scale up innovation, and lead in clean and smart technologies.

The European Competitiveness Fund (ECF) is where the R&I battery sector should focus its interest, given its strategic relevance in the coming years and the significant funding allocated to it (€409 billion, including the Horizon Europe allocation).

## Introduction

There have been six multiannual financial frameworks (MFFs) to date. The European long-term budget is established for at least five years (currently seven), with the aim of ensuring that the EU's expenditure develops in an orderly manner and remains within the limits of its own resources. The MFF Regulation sets expenditure ceilings for broad categories of spending, known as headings. In the wake of the COVID-19 outbreak, on 27 May 2020, the European Commission proposed a recovery plan (NextGenerationEU) that included revised proposals for the MFF 2021-2027 and own resources, and the setting up of a recovery instrument worth €750 billion (in 2018 prices). The current package was adopted on 16 December 2020 following interinstitutional negotiations between the European Commission, the Council of the EU (Council) and the European Parliament.

The EU budget is mainly used for investment and complements national budgets. Its main goal is to boost growth and competitiveness at a broader EU level. It is only used when it is more effective to run initiatives at the EU level rather than at the local, regional or national level.

# 6

The Fund will direct its support towards four policy priorities, with the first two being of particular interest to the battery sector:



**Clean Transition  
and Industrial  
Decarbonisation**

**€67.4 billion**



**Health, Biotech, Agriculture  
and Bioeconomy**

**€22.6 billion**



**Digital Leadership**

**€54.8 billion**

**Resilience and Security,  
Defence Industry and Space**

**€130.7 billion**



Horizon Europe will remain a standalone programme, but aligned with the policy priorities of the European Competitiveness Fund. The proposed budget for the EU's research framework will be almost doubled (€175billion) compared to the current MFF (€93.5billion). The new Horizon Europe structure will consist of four pillars: Excellent Science, Competitiveness and Society, Innovation, and the European Research Area. Pillar 2 on Competitiveness, which includes the European Partnerships and collaborative research, will be shaped by the policy priorities mentioned above.

Other relevant programmes for the battery sector include the Connecting Europe Facility, which aims to interconnect Europe through both transport and energy corridors. The budget allocated to the energy strand will increase fivefold to nearly €30 billion, making it an important source of funding for battery energy storage systems.

Last but not least, the Innovation Fund will be part of the European Competitiveness Fund and retain its current allocation of approximately €41 billion.

# CURRENT MULTIANNUAL FINANCIAL FRAMEWORK 2021–2027

This section summarises the structure (headings) and appropriations of the current MFF.

## 1. Single Market, Innovation and Digital

This heading allocates the investment in areas such as research and innovation, digital transformation, strategic infrastructure, and the Single Market. Programmes funded under this section: **Horizon Europe**, InvestEU, the Single Market Programme, EU Space Programme.

## 2. Cohesion, Resilience and Values

The main programmes under this spending category aim to strengthen the cohesion among EU Member States: Recovery and Resilience Facility and REACT-EU under NextGenerationEU, the European Social Fund+, Erasmus+ and RescEU. This heading constitutes the largest section of the budget in terms of spending (60%) and aims at reducing disparities in EU regions, within and across Member States, and promoting sustainable territorial development.

## 3. Natural Resources and Environment

Part of the programmes under this spending category support Europe's farming, agricultural and fisheries sectors and seek to make them more competitive and sustainable. Other programmes are dedicated exclusively to the EU's environmental and climate objectives. The main programme in this section is the Common Agricultural Policy (CAP), but there are others like the LIFE programme and the Just Transition Fund.

## 4. Migration and Border Management

Programmes under this heading tackle the challenges linked to migration and the management of borders. The main programmes are the Asylum and Migration Fund and the Integrated Border Management Fund.

## 5. Security and Defence

This heading includes programmes that strengthen the security and safety of European citizens, improving Europe's defence capacities, and providing the tools to respond to crises. Some examples of programmes under this heading: the Internal Security Fund, financial support to help decommissioning certain nuclear power plants, and the European Defence Fund.

## 6. Neighbourhood and the World

Programmes under this heading invest in the EU's external action in its neighbourhood, in developing countries and the rest of the world. Most instruments that fund the EU's external action were merged into a Neighbourhood, Development and International Cooperation Instrument (NDICI), including the European Neighbourhood, Africa and the Western Balkans. An instrument for pre-accession helps the candidate countries on their path to fulfilling the accession criteria.

## 7. European Public Administration

This heading covers mainly the administrative expenditure of all EU institutions, as well as the pensions of the retired EU officials.

The allocations for each heading are collected in the table below. A more detailed and visual infographic on the MFF (*Figure 1*) can be found in the next pages.<sup>1-3</sup>

Allocations per heading (in € billion)	MFF	NGEU	TOTAL	% MFF
1. Single Market, Innovation and Digital	149.5	11.5	161.0	8%
2. Cohesion, Resilience and Values	426.7	776.5	1 203.2	60%
3. Natural Resources and Environment	401.0	18.9	419.9	21%
4. Migration and Border Management	25.7	-	25.7	1%
5. Security and Defence	14.9	-	14.9	1%
6. Neighbourhood and the World	110.6	-	110.6	5%
7. European Public Administration	82.5	-	82.5	4%
<b>TOTAL</b>	<b>1 210.9</b>	<b>806.9</b>	<b>2 017.8</b>	
<b>TOTAL expressed in 2018 prices</b>	<b>1 074.3</b>	<b>750.0</b>	<b>1 824.3</b>	





# MULTIANNUAL FINANCIAL FRAMEWORK 2021-2027 AND NEXT GENERATION EU

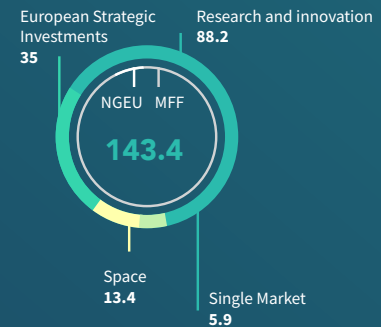
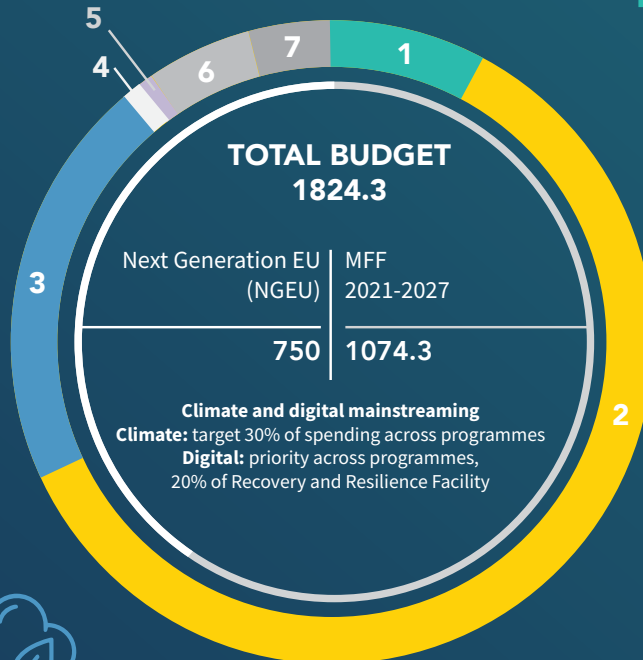
Expenditure for 2021-2027

All amounts in €billion (2018 prices)



1

## Single Market, Innovation and Digital

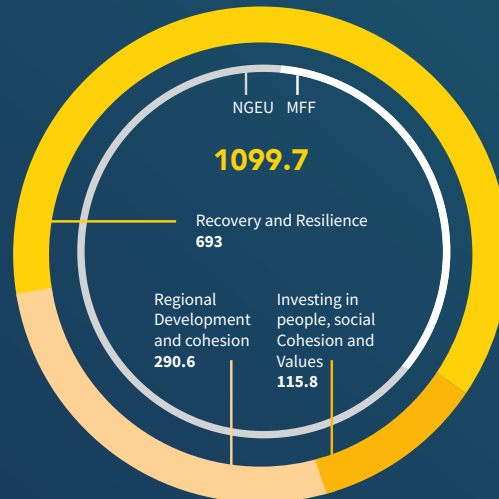
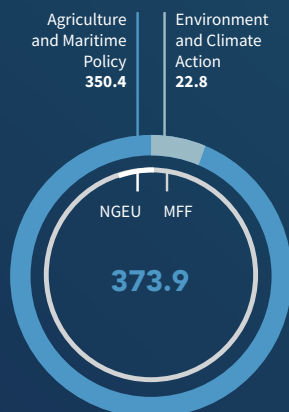


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## Cohesion Resilience and Values

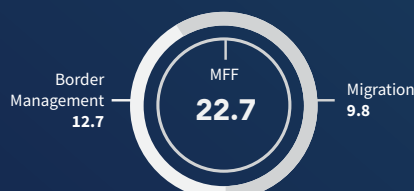
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## Natural Resources and Environment



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## Migration and Border Management



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## Security and Defence



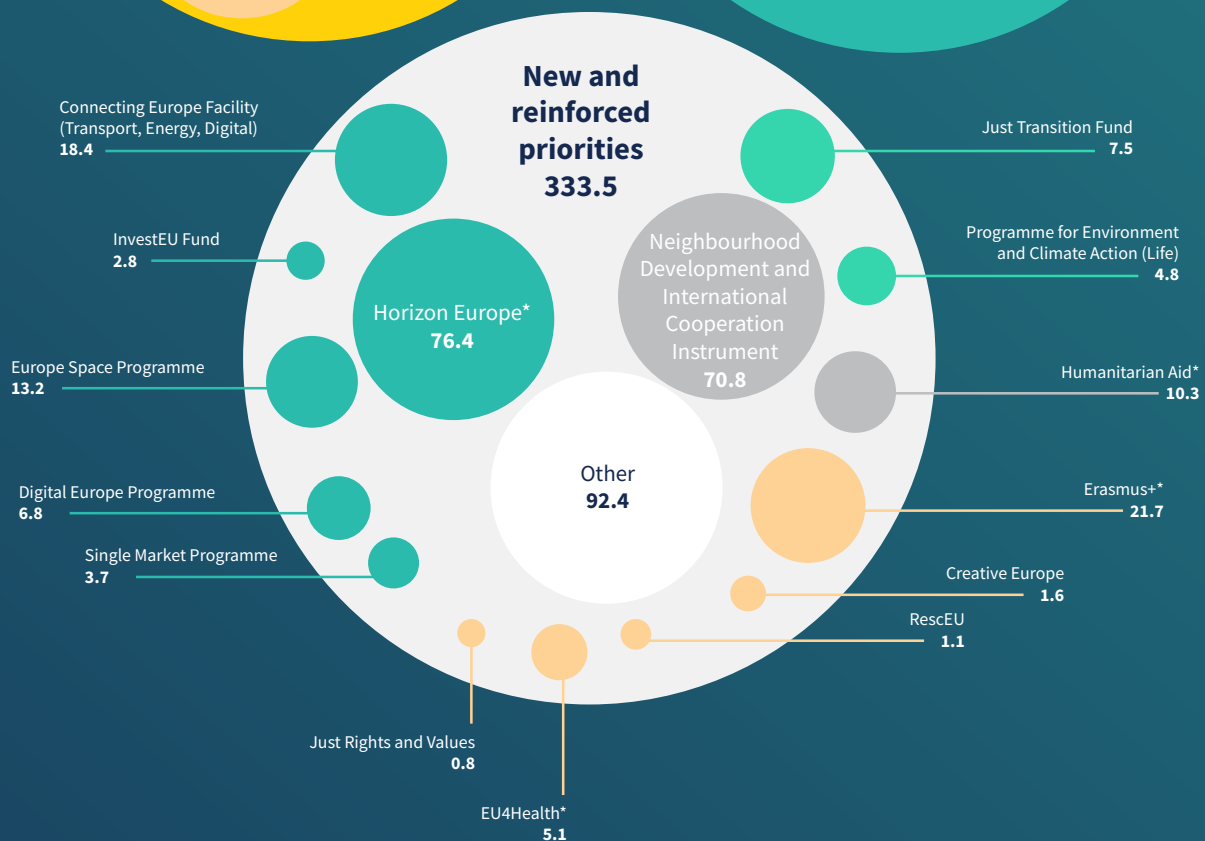
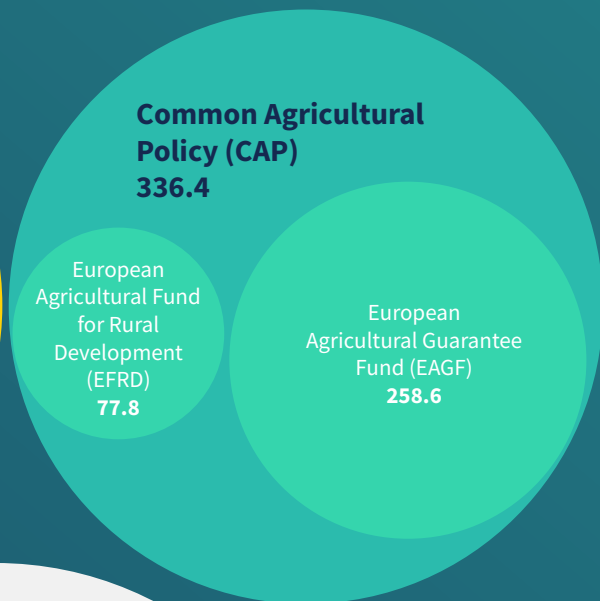
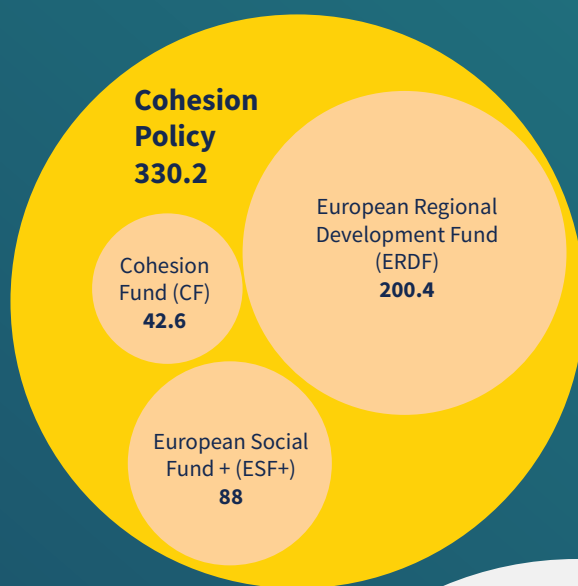
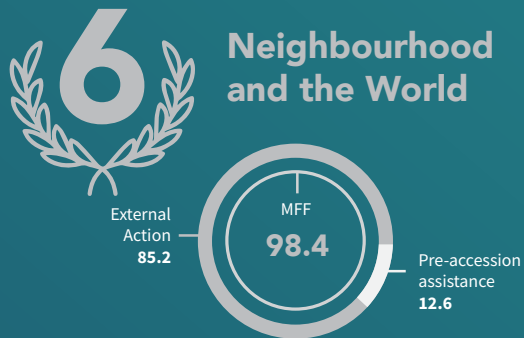


Figure 1. Infographic by the Council on the Multiannual Financial Framework 2021-2027 and Next Generation EU.

This section summarises the structure (headings) and appropriations of the next MFF as proposed by the European Commission. It is noteworthy that negotiations with the Member States and the European Parliament could modify the Commission's proposal. You will find more information on the upcoming steps in the last section of the document.

### **From 7 to 4 headings, from 52 to 16 programmes:**

The proposed 2028-2034 MFF will be structured around three headings related to the Union's major sectors of activity supported by the Union budget and focused on delivering on shared policy priorities. A fourth heading covers expenditure for European public administration.<sup>4-6</sup>

### **Total budget: €2 trillion.**

1.26% of gross national income (1.1% for the previous MFF). The overall total and the figures below are expressed in 2025 prices.

## **1. Europe's social model and quality of life: €1 trillion**

- National and Regional Partnership Plans: **€865 billion**
- Repayment of NextGenerationEU: **€168 billion**

## **2. Competitiveness, prosperity and security: €590 billion**

- European Competitiveness Fund: **€450.6 billion**
  - Horizon Europe: €175 billion (+84%)
  - Innovation Fund €41.2 billion
  - Clean Transition and Industrial Decarbonisation: €67.4 billion
  - Resilience and Security, Defence Industry and Space: €130.7 billion
  - Digital Leadership: €54.8 billion
  - Health, Biotech, Agriculture and bio-economy: €22.6 billion
- Connecting Europe Facility: **€81.4 billion**
  - CEF-E: €29.9 billion
  - CEF-T: €51.5 billion (of which military mobility: €17.6 billion)
- Erasmus+ and AgoraEU
- Justice, Union Civil Protection Mechanism & Health Response



- Single Market Programme, Euratom and ITER, Nuclear decommissioning, Pericles

### 3. Global Europe: **€215 billion**

- Global Europe Instrument: **€200 billion**
- Common Foreign and Security Policy, Overseas countries and Territories

### 4. Administration: **€118 billion**

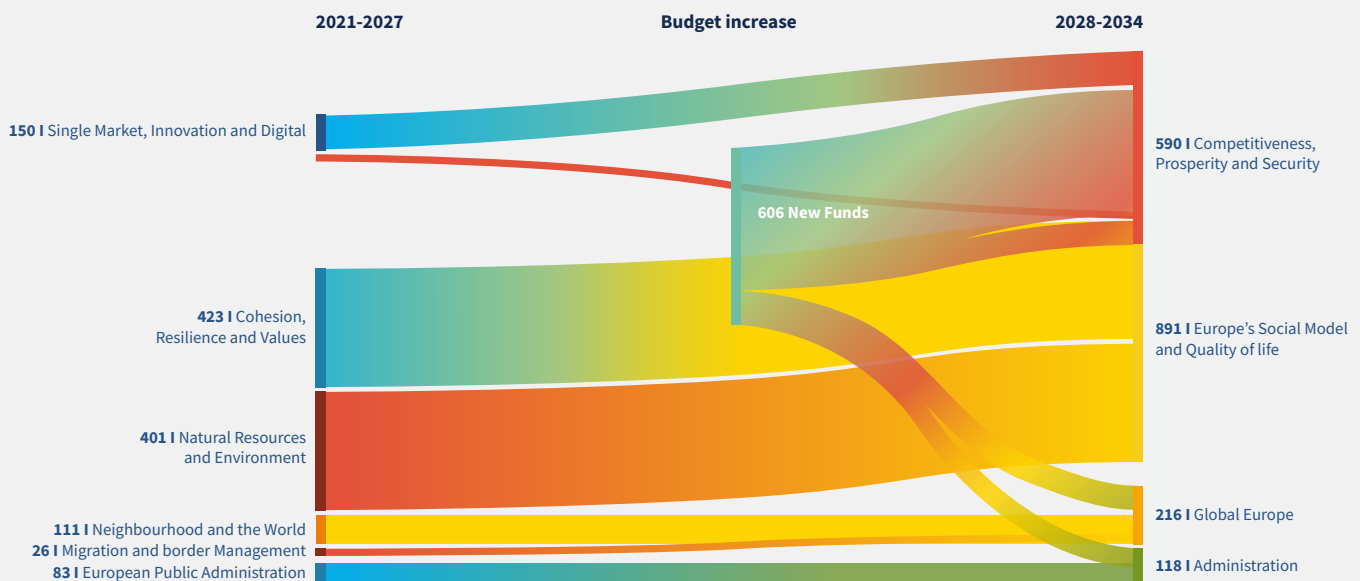
- Expenditures for the European Public Administration. Stable share around 6% of the MFF.

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Beyond these four headings, the MFF includes a Flexibility Instrument of €15.7 billion and a reserve of €100 billion to support Ukraine. Additional revenue will be generated through the new own resources: EU Emissions Trading System (ETS), Carbon Border Adjustment Mechanism (CBAM), the Corporate Resource for Europe (a tax on companies operating in the EU with an annual turnover of at least €100 million), a tobacco tax, and a non-collected e-waste tax. These new own resources are aimed at repaying the post-COVID-19 common debt and creating a more sustainable budget that does not depend solely on Member States' contributions.



To better visualise the differences in budget headings between the current and next MFF, a Sankey diagram is provided below (Figure 2). Most of the “new funds” from the budget increase, from €1.2 trillion to €2 trillion, are channelled into the heading Competitiveness, Prosperity and Security. The allocation for repayment of the NGEU loan (€168 billion) has been excluded from the diagram.



**Figure 2.** Sankey diagram showing the tentative cash flow from the 2021–2027 MFF headings to the 2028–2034 MFF. The repayment of NGEU has been subtracted from the allocation under the heading “Europe’s Social Model and Quality of Life.” Nominal amounts in current prices (2018 and 2025), EUR billion. The inflation variation from 2018 to 2025 has not been taken into account.

## EUROPEAN COMPETITIVENESS FUND

This section summarises the budget allocations for the European Competitiveness Fund (ECF) while providing relevant context, and it does not aim to serve as a briefing on the Fund, which will be circulated in due course.

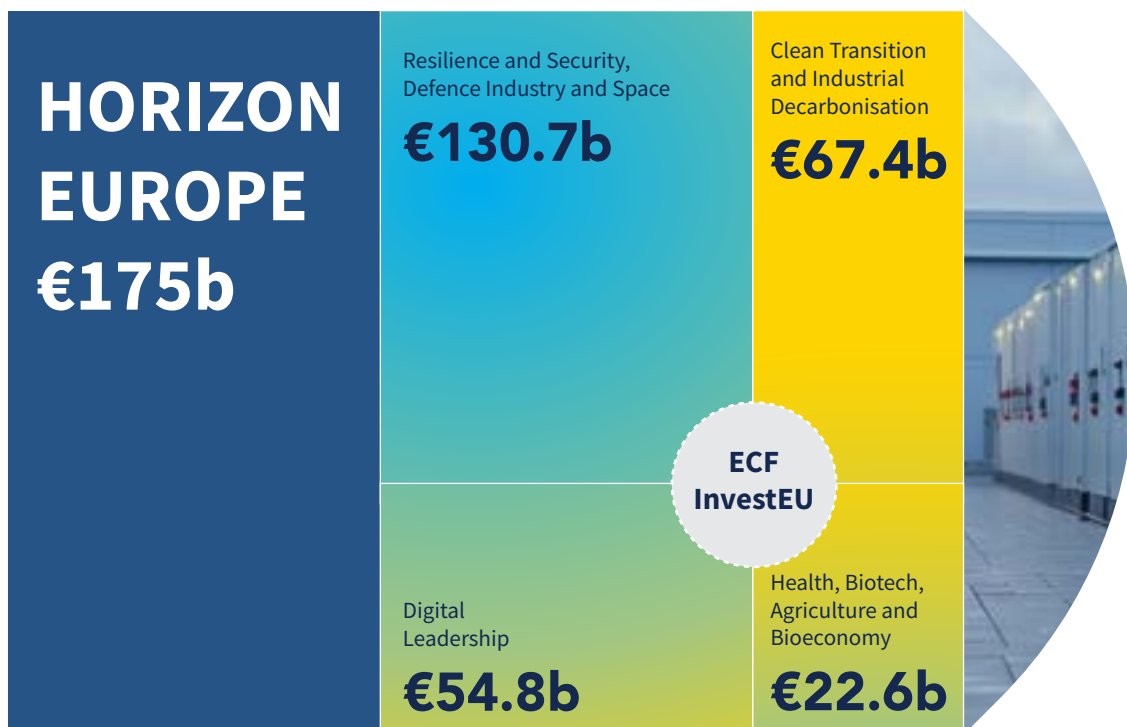
The European Competitiveness Fund (ECF) is the main pillar of the “**Competitiveness, prosperity and security**” heading of the budget. The ECF’s general objective is to increase European competitiveness, notably in strategic sectors and technologies along the investment journey. **The ECF will be closely linked to the Framework Programme for Research and Innovation (Horizon Europe)** through the development of integrated work programmes and a single rulebook under the ECF Regulation.<sup>7</sup>

The ECF is designed to steer investments towards the EU’s industrial and technological priorities, strengthening Europe’s strategic

autonomy and global competitiveness. It will operate under a **single rulebook and a single portal**, providing common rules for project promoters and simplifying access to funding. The ECF will support projects across the entire innovation cycle, from research and development to industrial scale-up, **ensuring that promising technologies can reach the market within Europe**. By leveraging private investment through the ECF InvestEU Instrument, the fund aims to unlock additional financing with greater impact on the EU budget, ensuring that public funds catalyse private capital to accelerate Europe’s green and digital transitions while reinforcing its industrial base.

The allocations for the Horizon Europe and the ECF policy windows are depicted in **Figure 3**.





*Figure 3. Structure and allocations for the European Competitiveness Fund. The Innovation Fund allocation (€41.2b) is included in the total amount of €451 billion.*

**The ECF will consolidate activities currently spread across up to 14 different budget lines:**

- Innovation Fund
- Digital Europe Programme and a €2 billion component of the Connecting Europe Facility (CEF) for digital projects
- European Defence Fund (EDF), Act in Support of Ammunition Production (ASAP), European Defence Industry Reinforcement through Common Procurement Act (EDIRPA), and European Defence Industry Programme (EDIP)
- EU4Health
- European Space Programme and IRIS<sup>2</sup>
- InvestEU

**Horizon Europe will remain a standalone programme** but tightly connected to the ECF policy windows (see Figure 4 in the next section). The European Commission directorates responsible for research (DG RTD) and for industrial policy (DG GROW) will jointly manage the ECF. This reflects the close connection intended between the ECF and the Horizon Europe research programme. At the political level, ECF will be overseen by Ekaterina Zaharieva, the commissioner responsible for research, and Stéphane Séjourné, the commissioner responsible for industrial strategy.



The ECF Regulation<sup>7</sup> presents relevant proposals for the battery sector. These provisions are the following:

## Single Rulebook

- Third parties may make additional financial contributions to the ECF or its activities.
- Cumulative funding from other EU programmes.
- Competitiveness Seal to high-quality projects facilitating access to funding
- EU preferential conditions. Restrictions or incentives for Union entities.
- Union support may be provided in any form (grants, prizes, procurement, non-financial donations, budgetary guarantees, and financial instruments).
- Parts of the ECF may be implemented through Public-Private or Public-public Partnerships established under Horizon Europe.

## ECF Toolbox

### • **Single Market Value Chains Builder.**

The work programmes may include dedicated value chains scaleup calls to support both project preparation and crowding in of additional public and private capital to integrate suppliers, manufacturers, and innovators from different Member States and diversify sources of supply.

### • **EU Tech frontrunners.**

The work programmes may launch two-stage bottom-up awards to support Europe's top tech companies working in industry-led consortia. These calls aim to strengthen their global competitiveness and that of their European SME suppliers by investing in new solutions and helping them find partners. Project preparation and the mobilisation of additional public and private investment may also be supported.

### • **Production ramp-up actions.**

Financial contributions may now cover actions that started prior to the date of the submission of the proposal for those actions.

### • **Top Ups for IPCEIs.**

The ECF may support projects directly participating in an IPCEI.

### • **Accelerated and Targeted Actions for Competitiveness.**

To enable EU support for urgent or imperative public interest actions that cannot be handled under normal budget rules, the work programmes may include specific award procedures that can apply certain exceptions or special rules during project selection and implementation.

- The ECF InvestEU Instrument shall address market failures or suboptimal investment situations:

- It will serve as the Union's integrated platform for delivering targeted financial support to companies across all development phases: startups, scaleups, including those actively pursuing manufacturing, industrial and market deployment.
- The Commission will develop a Scaleup facility in cooperation with the European Investment Bank (EIB) and other financial institutions to provide a set of financing tools tailored for scaleups.
- The budgetary guarantee and financial instruments (including when combined with grants) may be used to support other EU programmes, such as the EU ETS Innovation Fund, in line with their objectives.
- The ECF InvestEU Instrument will be implemented by the EIB, international financial institutions and the national promotional banks and institutions.

## Project advisory, SME collaboration, skills development and access to funding

- The **Project Advisory** will be made available for repayable and non-repayable instruments, which will include investment advisory services, business coaching and acceleration services, cooperation with industrial alliances and European clusters, support the generation of project pipelines and the development of potential investment projects under the ECF InvestEU Instrument.
- An **EU for Business Network**, with particular emphasis on SMEs, startups and scaleups, will be established to help businesses become more competitive and innovative.
- Each policy window will support dedicated, sector-specific actions targeting startups and SMEs to foster innovation, business acceleration, commercialisation and scaling-up.
- The ECF will finance activities in support of skills development.
- **Beneficiary Service Desk.** Maintains and expands a single electronic portal to make it easier for participants to access EU funding, regardless of how the budget is managed. This includes providing advisory services and **business acceleration support**.



## Specific activities of interest to BEPA members to be supported under each policy window:

### • **Clean transition and industrial decarbonisation**

- Energy storage, energy efficiency and demand-response.
- Electrification of energy-intensive industries and cities (energy, transport, buildings).
- Safe transport and mobility, including vehicles and infrastructures.
- Scaling up the manufacturing capacity of net-zero technologies and their supply chain.

### • **Digital leadership**

- Support for cross-sectoral digital technologies and applications.
- Employment of digital solutions across economic sectors, through research, innovation and deployment, to boost their productivity and competitiveness, with a focus on more complex technologies.

### • **Resilience and security, defence industry and space**

- Support for the strengthening of the EU capacity in exploration, extraction, processing, recycling and purchasing of raw materials.

- Support to Defence R&D, Innovation and Technological Superiority, including spin-in actions to adapt civilian technologies for defence.

- Military Logistics Enablement and Support: activities related to the enhancement of military mobility capabilities and/or supporting dual use of civilian-military assets, including infrastructure and super-structures resilience.

As set out in the Clean Industrial Deal, it will be essential to combine decarbonisation and economic growth, through affordable energy prices, support for EU-made clean products (via the **Industrial Decarbonisation Accelerator Act**, still to be published), high-quality jobs and reinforced financing, including through the Industrial Decarbonisation Bank.

The **Industrial Decarbonisation Bank** (IDB), expected to be a €100 billion initiative, will fall under the governance of the ECF, as announced in the Clean Industrial Deal.<sup>8</sup> However, the proposal is anticipated to be presented during the second quarter of 2026. The IDB is expected to draw its funding from four primary sources: Innovation Fund (€20 billion), InvestEU (€25 billion), additional ETS revenues (€25 billion) and co-financing from Member States (€30 billion). The IDB will provide funding based on the carbon emission reduction potential of projects, but its implementation is still uncertain.

## HORIZON EUROPE

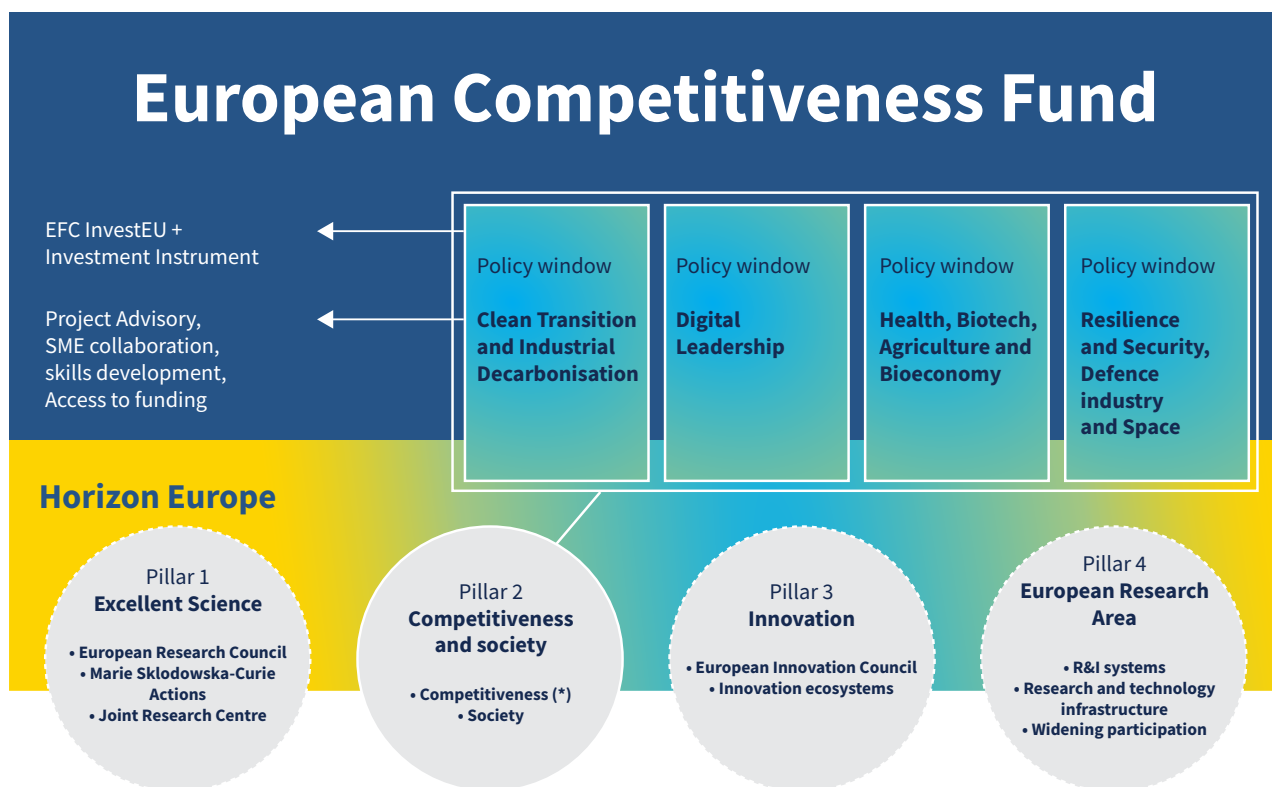
Once more information becomes available, we will duly inform BEPA members, paying special attention to its complementarity with the Innovation Fund (grants for net-zero projects and auctions for renewable hydrogen).<sup>9</sup>

This section summarises the budget allocations for the HE while providing relevant context, and it does not aim to serve as a briefing on the HE, which will be circulated in due course.

The European Commission proposes to almost **double Horizon Europe's funding** to €175 billion for the period 2028–2034, compared to the current programme (€93.5 billion).<sup>10-11</sup> During the 2021–2027 MFF negotiations, the Commission's initial proposal of €120 billion was reduced to €88.5 billion, with a subsequent €5 billion top-up from NGEU funds. More information on the negotiations and approval procedure can be found in the next section of the document.

The Commission aims to promote simplicity and flexibility, enabling faster and more strategic EU spending through clearer rules and more transparent procedures for applicants and stakeholders. The tenth Framework Programme for Research and Innovation (FP10) will be structured around four pillars instead of the current three, with Pillar 2 managed by the ECF ([Figure 4](#)).





*Figure 4. Structure of FP10 and its correlation with the ECF. Pillar 2, highlighted with a yellow dashed border, will be under the ECF.*

The budget for fundamental research under **Pillar 1** (ERC, MSCA and JRC) will go up from €25 billion to €44 billion compared to the current Horizon Europe.

**Pillar 2** budget on collaborative research will increase from €53.5 billion to €75.8 billion (€68.2 billion for competitiveness and €7.6 billion for society). The funding for competitiveness will be managed under the ECF and aligned with its priorities as detailed in the previous section: clean transition (€25.3 billion), life sciences (€19.6 billion), digital leadership (€16.8 billion), and resilience, security, defence and space (€6.4 billion). The Clean Transition priority will increase significantly (68%) compared to the current €15 billion allocated for climate, energy and mobility.

The budget for Innovation associated with **Pillar 3** will get the highest increase compared to the current FP9. The allocation will almost triple from €13.6 billion to €38.7 billion. This boost will be mostly directed to the European Innovation Council (EIC), which provides grant and equity funding to startups and researcher-led innovation projects.

The last Pillar funds a common European research policy and will have a budget of €16.2 billion compared to its current €3.4 billion. This increase is due to the funding of research infrastructure moving from Pillar 1 to **Pillar 4**, although the Widening programme will benefit from a meaningful boost from €3 billion to €5.4 billion.

The **European Partnerships**, including in the form of Joint Undertakings, will continue to serve as a key instrument of the FP10, working synergistically with the ECF. They are proposed to be radically simplified and streamlined in their operations and organisation to enhance efficiency. The Partnerships' legal basis can be found in Article 11 of the Horizon Europe Regulation.<sup>10</sup>

The Horizon Europe programme and the European Competitiveness Fund could finance **moonshot projects** managed through the Competitiveness Coordination Tool. The legal basis for these projects is not set out in the Horizon Europe Regulation itself but is instead referenced in its Explanatory Memorandum, as part of ensuring consistency with existing policy provisions. As described in this section, moonshot projects are expected to progress from research to demonstration and real-world deployment. They would be supported by pooled funding from the EU (Horizon Europe and ECF), national, regional, and private sources. Within Horizon, the moonshots could tap into the competitiveness component of Pillar 2, including potentially setting up dedicated European partnerships in some cases. The regulation does not include a dedicated budget for the moonshots, thus reflecting the Commission's ambition to make the future long-term EU budget more flexible. The regulation does not propose specific initiatives. However, it does suggest several possible indicative moonshots.

## NEXT STEPS

The decision on the future long-term EU budget and revenue system will be discussed in parallel by Member States in the Council, and by the political groups in the European Parliament.

The timeline is uncertain as it depends on how the negotiations evolve, but the procedure is well established.<sup>12</sup> The Council identifies the points on which political direction and priority-setting from EU leaders are required. This provides political guidance on the main parts of the budget, enabling the Council to adopt its position, which is expected to happen at the end of this year. The European Parliament also adopts a position on the Commission's proposal. Once both institutions have set out their position, negotiations between Parliament and Council begin with the goal of reaching a common agreement. The Council must then approve the negotiated deal **by unanimity**, and the Parliament gives its consent, without the right to amend the Council's proposal, to conclude the decision-making process.

As mentioned, the timeline for the next MFF approval is uncertain, but the negotiations for the current budget can serve as a reference.<sup>13</sup> The Commission presented its proposal in May 2018, and EU leaders agreed on their position in July 2019, which included the recovery plan for the COVID-19 pandemic. In November 2019, negotiators from the Council and the Parliament reached a provisional agreement. The following month, the European Parliament gave its consent, and the Council adopted the regulation laying down the MFF for 2021-2027.

It is worth noting that, if necessary, **the long-term budget can be revised** during its lifetime in response to unprecedented and unforeseen challenges. This was the case for the current MFF following Russia's invasion of Ukraine, high inflation and interest rates, and challenges related to migration. As a result, the Commission proposed a budget revision in 2023, which the Council adopted after receiving the Parliament's consent in 2024.





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(11) Europe's Budget. Horizon Europe factsheet [https://commission.europa.eu/document/download/a0ecf3f6-a964-4e00-9cb3-4be28833b386\\_en?filename=MFF\\_HORIZON%20EUROPE\\_v9.pdf](https://commission.europa.eu/document/download/a0ecf3f6-a964-4e00-9cb3-4be28833b386_en?filename=MFF_HORIZON%20EUROPE_v9.pdf)

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All referenced content was checked on 29/07/2025. Please contact the BEPA office if any content is currently unavailable.



# Important Projects of Common European Interest (IPCEI)

## EXECUTIVE SUMMARY

### Purpose of the brief

To inform BEPA members about Important Projects of Common European Interest (IPCEI), its relevance for the battery sector, and to gather their insights on how to improve or complement it.

### Key takeaways on the IPCEI procedure

IPCEIs are large-scale, long-term European initiatives designed to create an exception in the state aid rules to enhance Europe's competitiveness and sustainable growth. They involve extensive partnerships across **at least four Member States**, with companies collaborating along **all stages of a strategic industrial value**



**chain.** Each applicant project commits to investing in either **Breakthrough Innovations or Open Infrastructures calls** and to widely disseminating project results to ensure positive spillovers that help offset any competition distortions arising from state aid. For BEPA members, the Breakthrough Innovations call should, in principle, be more conducive to facilitating eligibility. **IPCEIs address clear market failures** and typically involve substantial investments—often in the billions of euros at the project level and hundreds of millions per company—reflecting their role in structuring strategic European value chains over a timeframe of five to ten years.

National State Aid through IPCEI - in the form of a **grant - can fund up to 100% of eligible costs**. Although IPCEIs require cross border cooperation and the Commission authorises compatibility with EU rules, the actual grant allocation is done at national level under each participating Member State's own financial rules.<sup>1</sup>

## Summary of relevance to the battery sector

The consortium best suited to apply are companies who can lead **First Industrial Deployment** projects, meaning the upscaling of pilot facilities, demonstration plants, or first-of-a-kind equipment and facilities, covering the steps beyond the pilot line, including the testing phase and scaling up batch production.

The projects must contribute to **overcome important or systemic market failures, or societal challenges through breakthrough innovation**.

Each Member State must select the undertakings for the planned IPCEI. It is recommended to encourage small and medium-sized enterprises, including innovative startups, to participate either as IPCEI direct participants or as indirect or associated partners (see relevance section).

**Research organisations** can play key roles in indirect involvement in IPCEIs. Undertakings that might benefit from aid on other legal bases can also be part of an IPCEI created ecosystem (as so-called IAPs, “indirect” or “associated” partners) through collaborations with IPCEI direct participants and, in so doing, contribute to the relevant policy objectives pursued by the proposed IPCEI.

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<sup>1</sup> For the time being, a centrally managed EU IPCEI fund does not exist.

## Overview of the feedback process

The IPCEI framework has notable strengths. It supports inclusive participation across the value chain, involving companies of all sizes and research organisations, and can cover up to 100% of eligible project costs. Managed at the Member State level without predefined aid limits, it enables funding tailored to each beneficiary. IPCEIs focus on medium- to long-term transformative projects, financing R&D, pilot testing, first industrial deployment, and scaling-up, with comprehensive coverage of the full product development cycle and strong support for innovation across the battery ecosystem.

Despite these advantages, several weaknesses remain. The claw-back mechanism discourages participation, and cooperation within consortia lacks clear guidance. The process is complex, often requiring consultancy support, while calls for expressions of interest are poorly communicated. Fragmentation arises from varying Member State procedures and EC involvement, leading to unpredictable timelines. Research organisations face limited roles as they cannot participate directly, and cost-based funding provides no upfront support during high-investment phases.

To improve, IPCEIs need clearer communication on processes, timelines, and responsibilities, as well as better coordination and harmonisation across Member States to reduce delays and regulatory inconsistencies.

## OVERVIEW

All practical information about IPCEIs is explained in detail in the “Technical guidance on conditions and process” provided by DG COMP.<sup>1</sup>

If you have an R&D project with high financial or technological risks that requires substantial support to materialise, and you are seeking partners across the value chain, you may consider applying to the IPCEI call for expressions of interest as a direct participant. To receive State aid under IPCEI rules, your company and project must meet specific criteria, which are outlined in this briefing. You will also find information on the responsible authorities, practical guidance, and relevant references for further consultation.

<b>Full name and acronym</b>	Important Projects of Common European Interest (IPCEI)
<b>Managing body</b>	DG COMP. Proposals submitted by the Member States are managed by the Joint European Forum for IPCEI. <sup>1</sup>
<b>Type of support</b>	<p>Grants, up to 100% eligible costs.</p> <p>Eligible costs = Depreciation costs of CAPEX and OPEX for R&amp;D activities until TRL 8.</p> <p>Actual grant amount calculated based on the funding gap:</p> <p>funding gap = Net Present Value (project) – Net Present Value (counterfactual scenario)</p>
<b>Budget and timeline</b>	<p><b>Budget:</b> 1<sup>st</sup> IPCEI on batteries: €3.2b, 2<sup>nd</sup> IPCEI (EuBatIn): €2.9b in public support. <i>Average considering all IPCEIs: €3.7b.</i><sup>2</sup></p> <p><b>Timeline:</b> 1<sup>st</sup> IPCEI process took 8 months (all-time record), 2<sup>nd</sup> took 17 months.</p>
<b>Targeted TRLs and actors</b>	TRL 1-8. <b>Address important or systemic market failures through highly innovative projects.</b> <sup>3</sup>
<b>Eligibility and application</b>	At least 4 Member States involved in the project. Project submitted to the Member State competent authority. <sup>4</sup>
<b>Success stories</b>	<p>1<sup>st</sup> and 2<sup>nd</sup> IPCEIs on Batteries.<sup>5</sup> Advice and learnings:</p> <ul style="list-style-type: none"> <li>• IPCEI process can be lengthy and complex, so plan in advance. Anticipation is crucial.</li> <li>• Multiple stakeholders are involved. Coordination is key.</li> <li>• This is a great funding opportunity. Be ambitious.</li> </ul>

There are no predefined maximum aid amounts, only a requirement to perform a funding gap analysis at the level of each beneficiary. The Commission will often require that Member States implement a **claw-back mechanism** to avoid windfall profits in the event that the project is more profitable than expected.<sup>2</sup>

In the calls to interested undertakings, national authorities should also clarify that, depending on the project's specificities (e.g., scope, low amount of aid, stand-alone project etc.), aid might

<sup>2</sup> A claw-back mechanism is an ex post profit-sharing mechanism in which additional gains resulting from investments whose rate of return exceeds the beneficiaries' cost of capital should, at the request of the Commission and according to a pre-defined methodology, be distributed in a balanced manner to all project participants.

be granted under different legal bases, such as the General Block Exemption Regulation (GBER), the Framework for State aid for research and development and innovation (RDIF), or the Guidelines on State aid for climate, environmental protection and energy (CEEAG). Such projects can still participate fully in the IPCEI ecosystem. **IPCEI funding can be combined with other EU funding or other State aid under different rules**, as long as the total public contribution for the same eligible costs does not exceed the most favourable rate allowed under EU law.

## PROCESS AS IPCEI DIRECT PARTICIPANT

### 1. Calls for Expression of Interest

National authorities launch calls for companies to express interest in an IPCEI.<sup>3</sup> Companies submit a short pre-application; if pre-selected, they provide a detailed project portfolio and funding gap analysis.

### 2. Matchmaking Process

The coordinating country invites pre-selected companies to matchmaking events, to identify cross-border partners, define how their projects interlink along the value chain, and form consortia and decide on joint work packages.

### 3. Design Phase

National authorities assess and approve the projects, forming an integrated cross-border IPCEI with a common structure.

## 4. Pre-notification and Notification

The coordinating Member State submits the project portfolio and funding gap to the European Commission, which assesses all proposals. Projects must be complementary and part of a coherent, integrated structure with shared European goals.<sup>4</sup>

## 5. Adoption of State Aid Decision

The Commission formally approves the State aid, allowing Member States to grant it. A non-confidential version of the decision is then published.

## 6. Implementation of State Aid

National authorities implement the approved aid, managing the timing and disbursement in line with national procedures.

## 7. Project Implementation

Direct participants are typically involved in the IPCEI governance structure set by national authorities.

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<sup>3</sup> At least four Member States must design the initiative and share plans through the Joint European Forum for IPCEI.

<sup>4</sup> According to Article 13 of the IPCEI Communication (reference 7), the Commission may approve an “integrated project,” which consists of individual projects aligned under a common structure or roadmap, targeting a shared European objective and based on a systemic approach. These projects may span different parts of the value chain but must add significant complementary value.



*Figure 1. Key steps of the process according to the European Commission Technical guidance on conditions and process for IPCEI.<sup>3</sup>*



An IPCEI State aid notification file – required by Member States at the application stage – has three components:

1. **Project portfolio.** Text document to prove that all IPCEI regulatory criteria are met
2. **Funding gap questionnaire (FGQ).** Spreadsheet to identify eligible costs & compute the funding gap and the grand request
3. **Prodcom.** Spreadsheet to compute a proxy of market shares

The **Project portfolio** is a well-structured text document (ca. 80 pages) that describes the company's project (Chapter 1), budget, funding and State aid measures (Chapter 2) and demonstrates the compatibility of the State aid based on the IPCEI Communication's criteria

(Chapters 3-8). You will receive feedback on the Project portfolio composed by more than 100 questions during 3 to 5 rounds. Three quarters of the questions are on technical aspects about the company's project. Spillovers (company's commitments to share results) play a key role in the funding balance. Relevant information must be consolidated and summarised.

The **FGQ** is a pre-formatted spreadsheet used to describe the project's business plan, calculate the funding gap, compute the corresponding State aid request and identify eligible costs and State aid intensity. The assumptions made in the FGQ are challenged by the Commission and should be backed with external references like publicly available market studies or reports.

After matchmaking, each company finalises its Individual Project Portfolio. While PPs are

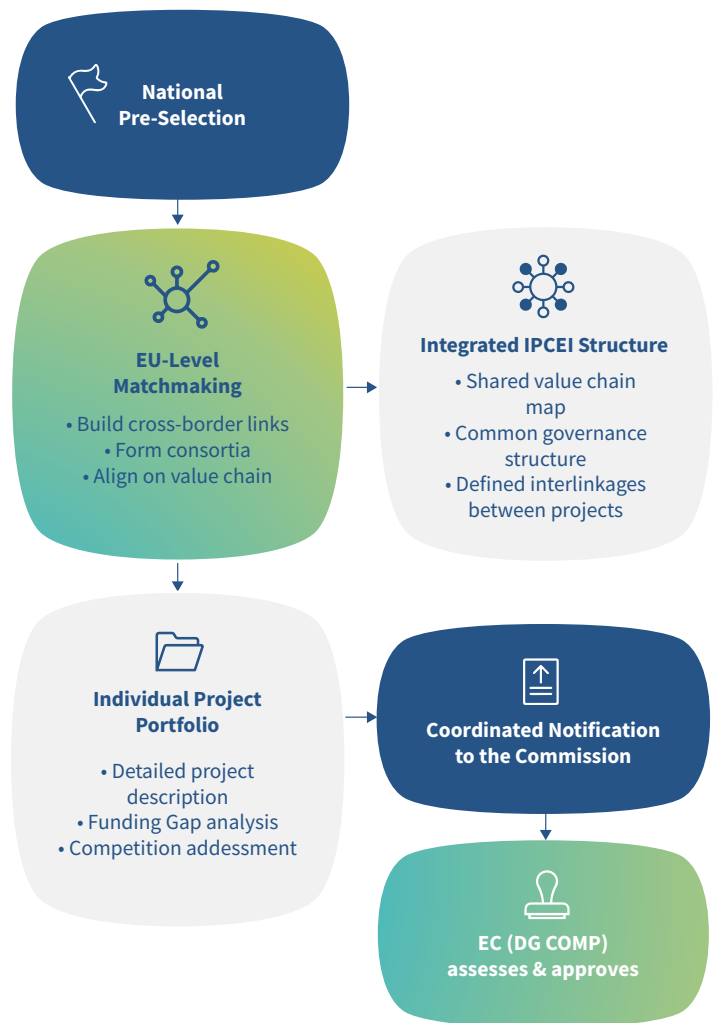


*Figure 2. A State-Gate Process. Procedural chart prepared by European Economics for the BEPA Policy Talks.<sup>6</sup> More detail on the process from step 4 to 5a is depicted in Figure 1 above.*



individual, after matchmaking they are aligned through a shared value chain map, a common governance structure and defined interlinkages between projects. In the Notification to the Commission (Phase 5), Member States, led by a coordinating MS, compile all Individual Project Portfolios and Funding Gap analyses, as well as an integrated project description, hence summarising interlinkages and value chain coherence.

The coordinating MS submits then one joint notification to the European Commission (see [Figure 3](#)). The coordinating MS submits the integrated IPCEI notification, but individual project portfolios remain the basis for DG COMP's state-aid assessment.



*Figure 3. Figure 3. Process for IPCEI Direct Participants.*



## RELEVANCE

The IPCEIs represent a major financial driver for Europe's competitiveness. They can support either open infrastructure or innovative projects, with the latter being particularly relevant for BEPA members. The battery industry already has two successful IPCEI examples to build on, launched in 2019 and 2021 demonstrating the instrument's potential to accelerate Europe's battery value chain.

Type of actors or segments best positioned to apply

Actors best suited for First Industrial Deployment (FID), meaning the upscaling of pilot facilities, demonstration plants, or first-of-a-kind equipment and facilities, covering the steps beyond the pilot line, including the testing phase and scaling up batch production.

Known beneficiaries from the battery sector

All beneficiaries from the 1<sup>st</sup> and 2<sup>nd</sup> IPCEI on batteries can be checked at the approved IPCEIs in the Batteries value chain.<sup>5</sup>

Alignment with key EU strategies

The project must contribute to **overcome important or systemic market failures**, or societal challenges. Key EU strategies for batteries: Strategic Technologies for Europe Platform (STEP) Regulation, Critical Raw Materials Act (CRMA) and Clean Industrial Deal (CID).

Potential impact on scaling, manufacturing, innovation, etc.

Your project must have a **funding gap** that can be calculated using the IPCEI Funding Gap template.<sup>3</sup> You must contribute to the financing of your project. If you are a SME, the Commission will not be as demanding as for a large company, and in duly justified cases this requirement may even be waived for an SME.







Member States are responsible for assessing IAPs' compliance with the relevant criteria.<sup>5</sup>

**IAPs can be all types of organisations: undertakings of any size and research organisations (ROs).** Both indirect and associated partners do not receive State aid funding under the IPCEI Communication:

- **Associated partners** contribute to the IPCEI with an own project and receive public funding under a national/regional aid scheme (incl. GBER) or EU fund. They engage in collaborations with IPCEI direct participants, spillover activities and are represented in the IPCEI governance.
- **Indirect partners** collaborate with at least one IPCEI direct participant or associated partner and may be invited to governance and networking events.

IPCEIs are expected to share scientific knowledge, skills, and know-how developed in both R&D&I and First Industrial Deployment (FID) phases. **Technological infrastructures play a key role in facilitating spillovers** by enabling the dissemination of knowledge and reducing duplication across regions, and by fostering collaborations with associated and indirect partners, including universities and research organisations. They also support SMEs and startups by providing access to equipment and expertise, especially during the FID stage.



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<sup>5</sup> AThe JEF-IPCEI recommends clear and distinct criteria, contributions and involvement in the IPCEI ecosystem for IAPs, as indicated in detail in reference (9) [Recommendation of the Joint European Forum for Important Projects of Common European Interest on the roles of associated and indirect partners in an IPCEI ecosystem](#)

## KEY TAKEAWAYS FROM FEEDBACK AND POLICY RECOMMENDATIONS

Drafted after reviewing the received feedback. Each recommendation is graded from Low (1) to High (5) in terms of feasibility and impact. The recommendations are labelled according to whether they are aimed at the legal basis of the instrument or at its implementation.

		Feasibility	Impact
		(1-5)	(1-5)
Access challenges and administrative process	EC to offer administrative support on long and complex processes that require detailed documentation. <b>Implementation</b>	3	4
Access challenges and administrative process	Risk of fragmentation and misalignment Promote procedural harmonisation across participating Member States to mitigate administrative delays, enhance coordination, and reduce the risk of regulatory divergence; EC to provide common guidelines within the MSs establishing a minimum common ground. <b>Legal basis</b>	2	5
Access challenges and administrative process	Claw-back mechanism may discourage companies from applying. Introduction of a tax on windfall profits instead. <b>Legal basis</b>	2	3
Relevance	Addresses all actors in the value chain. <b>Any recommendation has been collected.</b>	-	-

		Feasibility	Impact
		(1-5)	(1-5)
Gaps in coverage	RTOs to be considered eligible to apply as direct participants with specific criteria. <b>Legal basis</b>	2	3
Complementarity	There is no direct correlation with EU funding, but the acceptance of IPCEI does not exclude accession to EU funds. <b>Any recommendation has been collected.</b>	-	-
Speed and transparency	Ensure streamlined, timely, and transparent communication of the overall process, timeline, key milestones, and responsibilities, including when activities begin and who is responsible at EU level and within each participating Member State. <b>Implementation</b>	3	4
Communication	Unclear timing forecast due to fragmented process; calls for expressions of interest not widely publicised  EC to create a newsletter or any other form of direct communication that interested entities can rely on. <b>Implementation</b>	5	4
Support instruments	No specific support during the time of investments due to cost-based mechanism. Introduction of a hybrid funding scheme combining lump sum payments and the current system. <b>Legal basis</b>	1	3



## Raw feedback received by BEPA Members

### Advantages or strengths

**1. Addresses all actors in the value chain:**

large companies/SMEs/startups as direct participants; all types of organisations including research organisations as associated/indirect participants.

**2. May fund up to 100% of the eligible project costs.**

**3. The funding is managed at Member State level with high level of budget:** There are no predefined maximum aid amounts or intensities, only a requirement to perform a funding gap analysis at the level of each beneficiary.

**4. Covers medium to long term projects:** IPCEIs frequently encompass R&D and first industrial deployment phases that span several years. IPCEIs are not short-term grants, but rather instruments for deep, transformative investment over multiple years. Robust funding gap analyses required by the Commission compare expected cash flows over the lifetime of the investment, indicating long-term project horizon.

**5. Comprehensive instrument, potentially covering all aspects of product development** and investment in new manufacturing plants.

**6. Substantial support for R&D topics** - development is clearly part of IPCEI. This way even large-scale process innovation can be funded: The Commission's IPCEI framework allows funding to cover R&D, pilot testing, first industrial deployment and related investments, including construction of production facilities, equipment, and infrastructure. Both battery IPCEIs support activities across the full battery ecosystem: raw and advanced materials, cell/module production, system integration, recycling, and smart software/testing systems. IPCEI covers the steps beyond the pilot line, including the testing phase and scaling up batch production.

### Drawbacks or weaknesses

**1. The claw-back mechanism is a significant deterrent** that may discourage companies from applying.

**2. The Consortium is requested to cooperate,** but there are **no clear guidelines** on how this is meant to happen since "business cannot be forced".

**3. Long and complex process that requires detailed documentation,** often necessitating support from consulting firms

**4. Calls for expressions of interest are not widely publicized,** yet missing them can be critical.

**5. IPCEI's hybrid nature:** a national subsidy agreed by at least four Member

States and the EC to support strategic value chains, without disrupting EU competition rules. **Risk of fragmentation and misalignment** of the process due to MSs using their own budgets, rules and procedures.

**6. Unclear timing forecast due to fragmented process** and DG COMP screening procedures.

**7.** Although **academic institutions or research centres** can contribute to an IPCEIs as indirect participants, and the results obtained could be useful for training and education, they have **no place to participate as direct participants**.

**8. IPCEI is based on cost** - while the IF is based on lump sum payments. The downside is that the IPCEI payments are spread across the whole project and there is **no specific support during the time of investments**.

## To be improved

**1. Ensure streamlined, timely, and transparent communication of the overall process, timeline, key milestones, and responsibilities**, including when activities begin and who is responsible at EU level and within each participating Member State (the list of national authorities is available, nevertheless some offices in charge of IPCEI have not been updated).

**2. Promote procedural harmonisation across participating Member States** to mitigate administrative delays, enhance coordination, and reduce the risk of regulatory divergence within the IPCEI implementation framework.





# References

- (1) [Joint European Forum for IPCEI \(JEF-IPCEI\)](#)
- (2) [Approved integrated IPCEI up to date \(July 2025\)](#)
- (3) [Practical information for IPCEI](#)
- (4) [Competent authorities in the Member States](#)
- (5) [Approved IPCEIs in the Batteries value chain](#)
- (6) [BEPA Policy Task Force webinar “IPCEIs – A tool for European Industrial & Innovation Leadership”](#)
- (7) [IPCEI Communication](#) (2021/C 528/02) *Criteria for the analysis of the compatibility with the internal market of State aid to promote the execution of important projects of common European interest*
- (8) [DG COMP Code of good practices for a transparent, inclusive, faster design and assessment of IPCEIs](#)
- (9) [Recommendation of the Joint European Forum for Important Projects of Common European Interest on the roles of associated and indirect partners in an IPCEI ecosystem](#)
- (10) [Technical guidance on conditions and process](#)

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# European Innovation Council

## EXECUTIVE SUMMARY

### Purpose of the brief

To inform BEPA members about the **European Innovation Council**, the application process to its funding schemes, its relevance to the battery sector, and to gather the insights from BEPA Members on how to improve EIC funding tools or complement them.

### Key takeaways on the EIC funding instruments

Launched in 2021 as a key component of Horizon Europe (Pillar III Innovative Europe), the European Innovation Council (EIC) **supports the development and scaling up of disruptive deep tech innovations and breakthrough technologies** with market-creating potential, which carry a high risk for private and public investors. Covering the entire innovation chain, the EIC aims to **bridge the gap between scientific discovery and market impact** through six main funding schemes aligned with different stages of innovation:



- **EIC Pathfinder:** early-stage research and breakthrough technologies.
- **EIC Transition:** technology maturation, validation and preparation for market readiness.
- **EIC Accelerator:** supporting startups and SMEs in developing and scaling up disruptive innovations.
- **STEP Scaleup:** supporting major funding rounds to help startups, SMEs, and investors scale up breakthrough innovations.
- **EIC Pre-Accelerator:** Supporting early-stage deep-tech startups and SMEs in widening countries to advance their technology, business, and investment readiness.
- **Advanced Innovation Challenges-Pilot:** Supporting high-risk deep tech innovations by startups, SMEs, and research teams with strong transformative potential but where commercial uptake is lacking.

The EIC supports top European innovators through proactive programme management, **Business Acceleration Services** (mentoring, investor and corporate engagement), and follow-up funding from EU and national programmes. To complement its grant-based support, and to bridge the gap between public funding and private investment, particularly for high-risk, deep-tech innovations, the

EIC has established the **EIC Fund** for direct equity investments, advised by the European Investment Bank<sup>5</sup>. The EIC Fund, with over €4 billion in capital, has invested €1 billion in ~261 companies across 25 countries, leveraging its funding to attract additional private investment.

## Summary of relevance to the battery sector

For spin-offs, startups, or SMEs with a disruptive technological proposal, the instruments created by the EIC are particularly recommendable. The EIC Accelerator is especially attractive to battery system developers close to commercialization (TRL 6-9). It funds highly innovative projects with very high risk and growth potential. The proposed product, service, or business model must be highly innovative and create new markets or revolutionise existing ones.

The EIC STEP Scale Up scheme, part of the Strategic Technologies for Europe Platform and managed by the EIC Fund, includes clean-tech - covering net zero energy technologies like battery storage - with equity investments ranging from €10 million to €30 million. This stream is ideal for scaling mature battery ventures towards large-scale manufacturing<sup>1</sup>.

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<sup>1</sup> [For details see the Guidance Note on STEP.](#)

## Overview of the feedback process

Members highlighted that the EIC funding instruments are technology neutral (including dual use technologies), well-focused and clearly structured, with well-defined dimensions and realistic budgets. The lead time between application and funding is generally reasonable, ensuring a predictable and efficient process for applicants.

Concerns were raised about the composition of expert panels, which can significantly influence evaluation outcomes. Past experience, particularly with the EIC Accelerator, showed that within a four-member panel, one or two experts may have limited understanding of the specific technology or topic proposed. This can lead to inconsistent feedback or evaluations that do not fully capture the quality and innovation potential of a proposal. Combined with a mission-oriented approach, there is a risk

that funded portfolios become a miscellanea of projects spanning diverse technologies and applications, without generating meaningful impact in specific sectors or addressing clearly defined application needs.

Members recommended strengthening the selection process for evaluation experts across the Pathfinder, Transition, and Accelerator short applications to ensure a more balanced and technically competent assessment. They also welcomed the recent decision to involve a highly qualified external technology expert to review proposals before submission to the evaluation panel. This measure is expected to reduce rejections caused by misunderstandings or weak proposal editing and to enhance the overall fairness and reliability of the evaluation process.



Additionally, there is a need to prioritize sectors and applications that are most relevant for the European economy and industry, including energy (with a focus on storage systems), ICT, health, manufacturing, defence, and others. Energy storage systems in particular should receive greater visibility and support across both Challenge and Open calls.

Moreover, the EIC could increase focus on DARPA-style challenge calls specifically targeting SMEs/startups for breakthrough chemistries not covered under Horizon Europe, to complement the existing Pathfinder → Transition → Accelerator pipeline. Stronger

coordination and matchmaking support during the Transition and Accelerator phases could help ensure that innovative technologies reach industrial-scale deployment more efficiently.

Finally, leveraging dedicated investment funds alongside grant funding could further de-risk scale-up and enhance the commercial impact of these next-generation innovations.



## OVERVIEW

To receive funding under EIC rules, your organisation and project must meet specific criteria, which are outlined in this briefing. You will also find information on the responsible authorities, practical guidance, and relevant references for further consultation.

<b>Full name and acronym</b>	European Innovation Council (EIC)
<b>Managing body</b>	<p>EISMEA - European Innovation Council and SMEs Executive Agency (implementation of calls and grant management, coordination with equity, Business Accelerator Services)</p> <p>EIC Board (strategic oversight)</p> <p>DG RTD (political responsibility)</p>
<b>Type of support</b>	<p><b>Grants:</b> up to €3 million (Pathfinder Open) and €4 million (Pathfinder Challenges); up to €2.5 million (Transition - Accelerator<sup>2</sup> - Advanced Innovation Challenges)</p> <p><b>Blended finance:</b> grants up to €2.5 million; equity investment up to €10 million (Accelerator<sup>3</sup>)</p> <p><b>Equity only investments:</b> minimum investment €10 million, maximum €30 million (STEP Scaleup)</p>
<b>Budget (2021-2027)</b>	<p>€10.1 billion (see <i>Figure 3</i>)</p> <p>Pathfinder €262 million; Transition €98 million; Accelerator €634 million; STEP Scale-Up €300 million</p>





## Timeline

### EIC Pathfinder

- Notification of evaluation outcome: ~ 5 months after the call deadline
- Grant agreement signature: by ~ 8 months after call deadline
- Project start typically soon after signature (within 1–2 months)

### EIC Transition

- Outcome of remote evaluation including feedback: ~ 9 weeks after deadline
- Interview: ~12–14 weeks after deadline
- Result of interview: ~ 4 weeks after interview start
- Grant agreement signature: within ~ 6 months from deadline

### EIC Accelerator

- Feedback on Step-1: ~ 4–6 weeks (for proposals passing first check)
- Evaluation of full (Step-2) proposals: ~ 8–9 weeks
- Interview decision: 2–3 weeks after interview
- Grant/investment agreement negotiation & due diligence: variable — could take a few additional weeks to a few months, depending on complexity

### EIC Advanced Innovation Challenges

Two-stage funding:

- €300K (up to 9 months) for feasibility and benchmarking
- up to €2.5M (2.5 years) to develop and test the most promising solutions with users.

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## Targeted TRLs and actors

TRL 1-3/4 (Pathfinder) Research teams

TRL 4-5/6 (Transition) SMEs and research organisations

TRL 6-9 (Accelerator) SMEs and startups

## Eligibility and application process

EU Member States/countries associated to Horizon Europe. Particular eligibility conditions (organisation types, technology readiness levels, consortia rules, etc.) will be defined in a specific call/work programme for a given year. (See *Figure 1* and *Figure 2*)

### *Example of a past call*

EIC Accelerator Challenges: Energy Storage (HORIZON-EIC-2023-ACCELERATOR-01) and Renewable energy sources and their whole value chain including materials development and recycling of components (HORIZON-EIC-2024-ACCELERATOR-RENEWABLE-ENERGY)

- Applicant type: Single startup or SME (including spin-outs)
- TRL: Proposals should focus on innovations that have a high potential to meet the objectives of the challenge.
- Consortium rules: While the call does not specify consortium requirements, the EIC Accelerator typically supports single entities.
- Geographical eligibility: Applicants must be established in EU Member States or countries associated with Horizon Europe.

*For the Application Process, please refer to the dedicated section in this briefing.*

## Success stories

PUSH-CCC, SULPHURREAL (long-term storage)

HIPERZAB, ReZilient, VanillaFlow, MeBattery, M-TES (mid-term storage)



## TABLE 1. SUMMARY OF MAIN CALLS IN 2025

Call	Who can apply	What for	EIC Open		EIC Challenge	EIC Challenges	
			Deadlines	Indicative Budget (EUR million)		Deadlines/ Cut-offs	Indicative Budget (EUR million)
<b>EIC Pathfinder</b>	Open call: only consortia can apply. Challenges call: smaller consortia (at least two eligible entities) or single applicants as well as larger consortia.	Open Call: Grants up to EUR 3 million. Challenge Call: Grants up to EUR 4 million. Higher amounts if duly justified. Projects to achieve the proof of principle and validate the scientific basis of breakthrough technologies (starting from early TRLs aiming at achieving TRL3 or 4).	21 May 2025	142	BioTech for Climate Resilient Crops and Plant-Based Biomanufacturing Generative-AI based Agents to Revolutionize Medical Diagnosis and Treatment of Cancer Towards autonomous robot collectives delivering collaborative tasks in dynamic unstructured construction environments Waste-to-value devices - circular production of renewable fuels, chemicals and materials	29 October 2025	120
<b>EIC Transition</b>	Single applicants (SMEs, spin-offs, start-ups, research organisations, universities) or small consortia (minimum 2, maximum 5 eligible entities).	Grants of up to EUR 2.5 million to validate and demonstrate technology in application relevant environment (starting at TRL 3/ 4 aiming at achieving TRL 5/ 6) and develop business and market readiness.	17 September 2025	98			
<b>EIC Accelerator</b>	Single start-ups and SMEs (including spin-offs), individuals (intending to launch a start-up/ SME) and in some cases small mid-caps (fewer than 499 employees).	Grant component: below EUR 2.5M for innovation activities (TRL 6 to 8). Investment component of EUR 0.5 up to 10 million for scaling up and other activities. Grant only and investment only component under certain conditions.	Short applications: any time (continuous) Full applications: 12 March 2025, 1 October 2025	384	Acceleration of advanced materials development and upscaling along the value chain Biotechnology driven low emission food production systems GenAI/ML: Creating European Champions in Generative AI Innovative in-space servicing operations, space-based robotics and technologies for resilient EU space infrastructures Breakthrough innovations for future mobility	12 March 2025, 1 October 2025	250
<b>EIC Accelerator - STEP scale-up call</b>	Single start-ups and SMEs, small mid-caps, investors on behalf of eligible companies.	Investment component of EUR 10 up to 30 million for scaling up strategic technologies for Europe.	Any time (continuous)	300			

This table provides a simplified overview. All applicants need to read the relevant sections for the full information on eligibility and conditions for funding, including Annex 2. As affiliated entities do not sign the grant agreement, they do not count towards the minimum eligibility criteria for consortium composition (if any). The Director-General responsible for the call may decide to open the calls up to one month prior to or after the envisaged date(s) of opening. The Director-General responsible may delay the call deadline(s) by up to two months.

Figure 1. Summary of main EIC calls in 2025, [EIC Work Programme 2025](#).<sup>1</sup>

## TABLE 2. SUMMARY OF MAIN CALLS IN 2026

Call	Who can apply	What for	EIC Open		EIC Challenge	EIC Challenges	
			Deadlines	Indicative Budget (EUR million)		Deadlines/ Cut-offs	Indicative Budget (EUR million)
<b>EIC Pathfinder</b>	Open call: only consortia can apply. Challenges call: smaller consortia (at least two eligible entities) or single applicants as well as larger consortia.	Grants up to EUR 4.5 million. Higher amounts if duly justified. Projects to achieve the proof of principle and validate the scientific basis of breakthrough technologies (starting from early TRLs aiming at achieving TRL3 or 4).	06/01/2026			28/10/2026	
<b>EIC Transition</b>	Single applicants (SMEs, spin-offs, start-ups, research organisations, universities) or small consortia (minimum 2, maximum 5 eligible entities).	Grants of up to EUR 2.5 million to validate and demonstrate technology in application relevant environment (starting at TRL 3 achieved/or 4 aiming at achieving TRL 5 or 6) and develop business and market readiness.	16/09/2026				
<b>EIC Advanced Innovation Challenges</b>	Single applicants (SMEs, spin-offs, start-ups, research organisations, universities) or small consortia (minimum 2, maximum 5 eligible entities).	First stage grants up to [ ] to develop potential solutions followed by larger grants up to €2.5m to prototype and user test selected solutions					
<b>EIC Accelerator</b>	Single start-ups and SMEs (including spin-offs), individuals (intending to launch a start-up/ SME) and in some cases small mid-caps (fewer than 499 employees).	Grant component: below EUR 2.5M for innovation activities (TRL 6 to 8). Investment component of EUR 1M up to 10 million for scaling up and other activities. Grant only and investment only component under certain conditions.	Continuous with batches 7/01/2022, 04/03/2026, 06/05/2026, 08/07/2026, 02/09/2026, 03/11/2026			Continuous with batches 7/01/2026, 04/03/2026, 06/05/2026, 08/07/2026, 02/09/2026, 03/11/2026	
<b>EIC- STEP Scale Up</b>	Single start-ups and SMEs, small mid-caps, investors on behalf of eligible companies.	Investment component of EUR 10 up to 30 million for scaling up strategic technologies for Europe.	One cut off per quarter: 11/02/2026, 06/05/2026, 09/09/2026, 25/11/2026			One cut off per quarter: 11/02/2026, 06/05/2026, 09/09/2026, 25/11/2026	

This table provides a simplified overview. All applicants need to read the relevant sections for the full information on eligibility and conditions for funding, including Annex 2. As affiliated entities do not sign the grant agreement, they do not count towards the minimum eligibility criteria for consortium composition (if any). The Director-General responsible for the call may decide to open the calls up to one month prior to or after the envisaged date(s) of opening. The Director-General responsible may delay the call deadline(s) by up to two months.

Figure 2. Summary of main EIC calls in 2026, [EIC Work Programme 2026](#).<sup>2</sup>

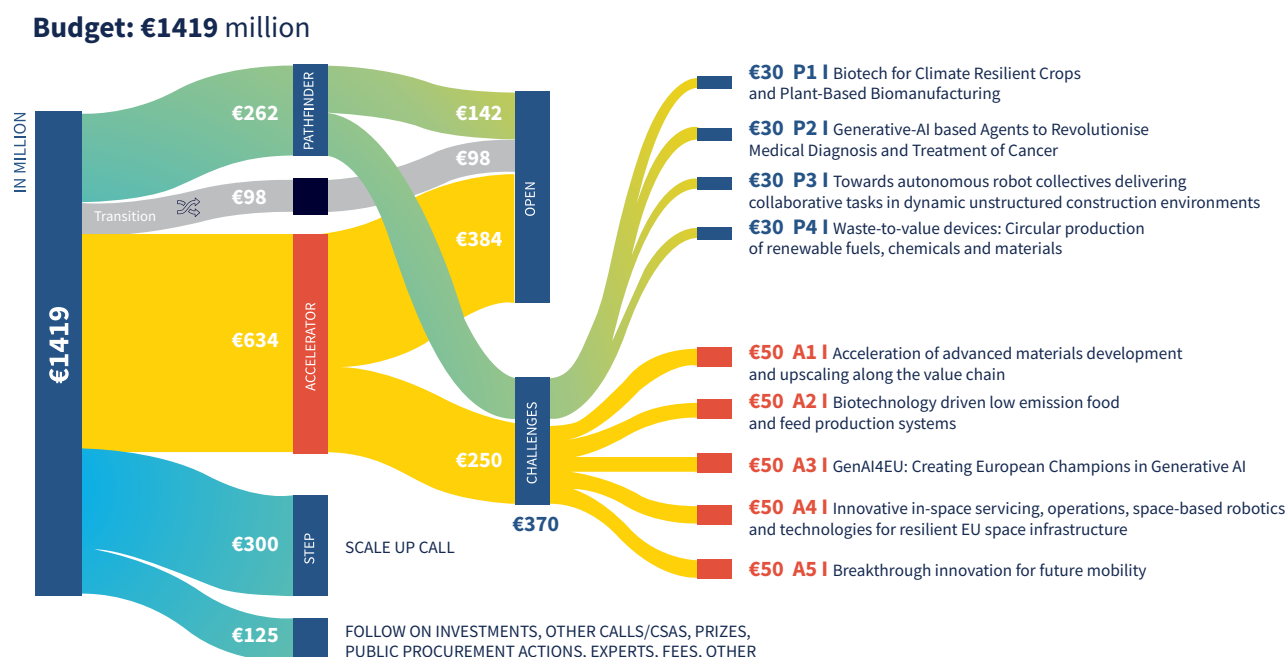


Figure 3. Budget overview, [EIC Work Programme 2025 factsheet](#).<sup>3</sup>

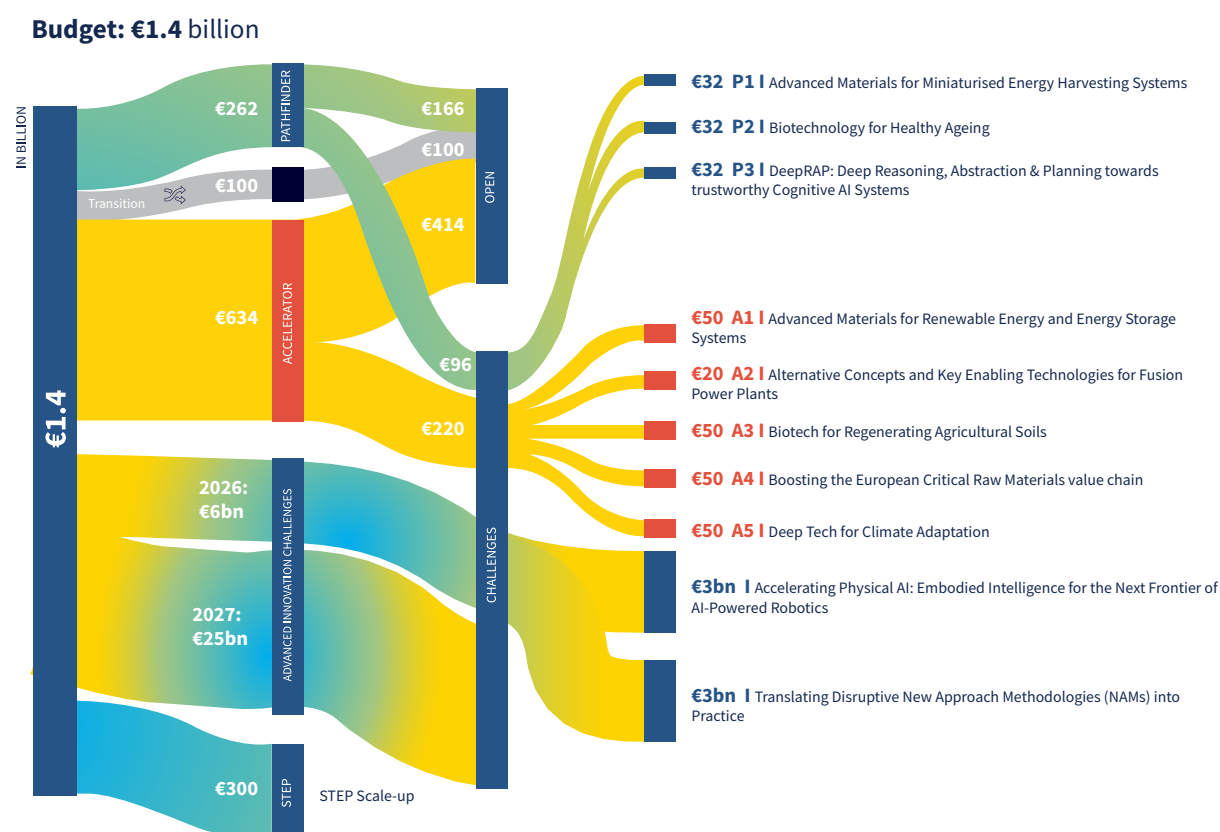


Figure 4. Budget overview, [EIC Work Programme 2026](#).<sup>2</sup>

# APPLICATION PROCESS

All details can be found on the [EIC Funding opportunities](#)<sup>4</sup> dedicated page.

## EIC Pathfinder

**1. Submission** – The proposal has to be submitted via the [Funding and Tender Opportunities Portal](#) before the given deadline:

a. EIC Pathfinder Open: 21 May 2025

b. EIC Pathfinder Challenges: 29 October 2025

**2. Evaluation** – Up to four EIC expert evaluators; results within 5 months from the call deadline

**3. Grant Agreement** – if your proposal is selected for funding, you can expect your grant agreement to be signed by 8 months after the call deadline.

## EIC Transition

**1. Submission** – Upload your proposal to the Funding & Tenders Portal before the deadline.

**2. Evaluation** – Expert evaluators review the proposal. If successful, you will be invited to an interview about 12–14 weeks after the deadline.

**3. Interview** – Up to 6 Jury Members assess your project. Results are usually communicated within ~4 weeks after interviews start.

## EIC Accelerator

**1. Submission** – Anytime (evaluated first-come, first-served); feedback within 4–6 weeks; if successful, you are invited to submit a full proposal to any of the 2026 cut-offs<sup>4</sup>.

**2. Evaluation** – Up to three EIC experts; result in 8–9 weeks.

**3. Interview** – Within 4–5 weeks after the announcement of the previous step's results. Results within 2–3 weeks

October 1 cut off: interviews January 19–23, 2026;

Dates of the 2026 cut-offs:

7/01/2026

04/03/2026

06/05/2026

08/07/2026

02/09/2026

04/11/2026

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<sup>4</sup> The full proposal consists of a full business plan, pitch deck and a 3 minutes video pitch.

**4. Funding Agreement** – Negotiate the grant component, start due diligence for investment component.

**4.1 Grant only:** you will sign the **Grant Agreement** and receive first pre-financing payment

**4.2 Blended finance:** you can use the additional flexibility of the investment component and negotiate a raise of maximum € 2 million.

From 2026, the application procedure will be streamlined and shortened to address stakeholders' comments, as it is explained in the next section.

## STEP Scale Up

**1. Submission** – Apply anytime via the Funding & Tenders Portal with a business plan, pitch deck, investor pre-commitment, and ownership declaration<sup>5</sup>.

**2. Interview** – notification within 4–6 weeks; jury decision communicated within 2 weeks after the interview.

## EIC Advanced Innovation Challenges

**1. Stage 1** – 2026: to prepare and benchmark breakthrough solutions and explore their feasibility and viability.

Deadline: 26 February 2026

**A single legal entity** such as startups, SMEs or research organisations.

**2. Stage 2 – 2027:** to further develop the most promising solutions and test them in real world environments and with the involvement of users.

Deadline: 18 June 2027

**A single legal entity** such as startups, SMEs or research organisations, or

A small consortium of two independent legal entities from two different Member States or Associated Countries, or

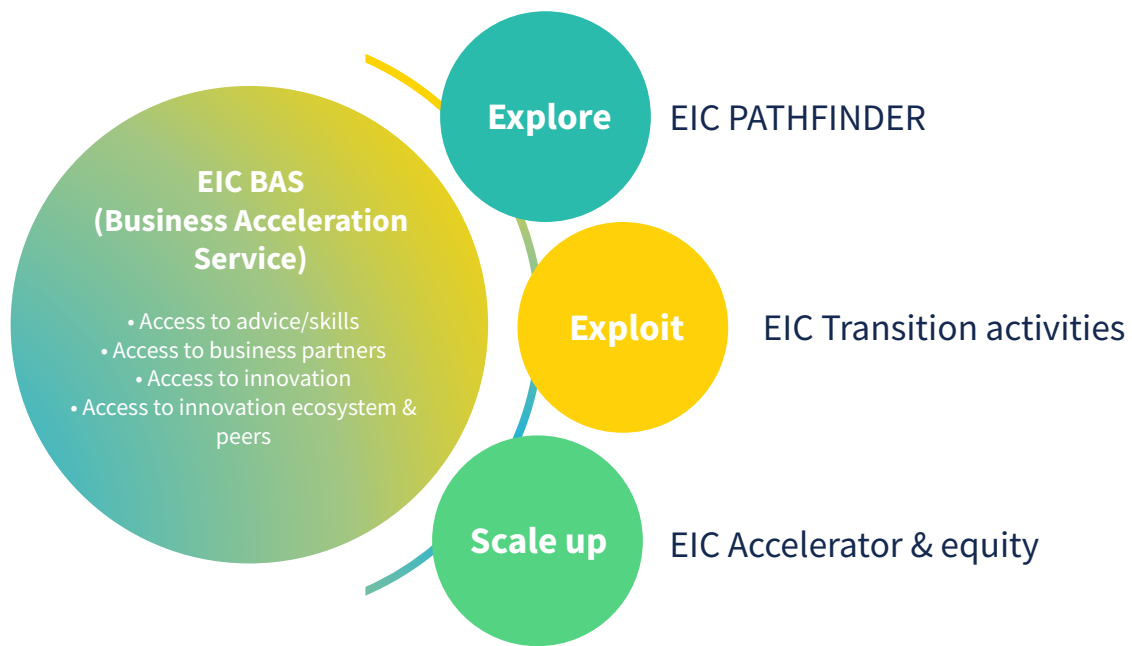
A consortium of maximum three eligible independent legal entities.

The award of Seals of Excellence under the Transition and Accelerator calls, and the new STEP Seal under the STEP Scale up and Accelerator Challenge calls aim to facilitate access to complementary and alternative funding sources such as Cohesion Policy Funds as well as to the EIC [Business Acceleration Services \(BAS\)](#).<sup>13</sup> The EIC BAS have no expiration date so beneficiaries are eligible to apply even if the project has ended.

These services are provided to the EIC Awardees and other eligible organisations as defined to support the innovation development of EIC project results and the commercialisation and scaling up of EIC supported innovations, including access to coaches and training, access to services of the EIC Ecosystem Partners, and access to global partners.

<sup>5</sup> [STEP application guidance document](#)





*Figure 5. EIC Business Acceleration Services. BAS are for all EIC awardees, as well as selected applicants. [BEPA Policy Talk "How can battery innovators best navigate European Innovation Council funding opportunities?"](#)<sup>6</sup>*



## RELEVANCE

The European Innovation Council (EIC) is a key instrument to boost Europe's strategic autonomy and technological leadership by supporting breakthrough innovations and scaling up high-potential startups. With dedicated funding for both early-stage research and later-stage commercialization, the EIC provides a unique bridge across the innovation chain. For BEPA members, it offers opportunities to secure equity and grant support to bring cutting-edge battery technologies to market, reinforcing Europe's competitiveness in the global battery race.



**Type of actors or segments  
best positioned to apply**

Pathfinder: Research teams

- Consortia of at least 3 different independent legal entities established in different countries
- Single applicants (Pathfinder Challenges only)

Transition: Startups, SMEs or research organisations

- Single applicants (SMEs, spin-offs, startups, research organisations, universities)
- Small consortia (minimum 2, maximum 5 eligible entities)

Accelerator: Startups and SMEs

- Single startups and SMEs
- Individuals intending to launch a SME and small mid-caps (can apply for equity only)

STEP Scale Up: Startups, SMEs and investors

- Single startups and SMEs, small mid-cap
- Investors on behalf of eligible companies

EIC Advanced Innovation Challenges: Startups, SMEs and research teams

- Startups and SMEs
- Research performing organisations (university, research or technology organisation, including teams, individual Principal Investigators and inventors)

**Known beneficiaries from  
the battery sector**

[PUSH-CCC](#) | [SULPHURREAL](#) | [HIPERZAB](#) | [ReZilient](#) | [VanillaFlow](#) | [MeBattery](#) | [M-TES](#)

**Alignment with key EU  
strategies**

Green Deal, Clean Industrial Deal (CRMA and NZIA), EU Digital Strategy, New European Innovation Agenda, EU Startup and Scaleup Strategy

**Potential impact on scaling, manufacturing, innovation, etc.**

- Scaling up deep tech firms in batteries and energy storage
- Mobilising investment and bridging finance gaps
- Facilitating innovation and R&D to manufacturing transition
- Supporting EU strategic industrial objectives and supply chain resilience
- Manufacturing innovation and deployment at scale

In October 2024, the European Commission adopted the **European Innovation Council's Work Programme for 2025**, setting out how the EIC will allocate its funding of over EUR 1.4 billion (a nearly €200 million increase compared to 2024) to strategic technologies and company scaling up.

The **2025 Work Programme** introduces a €300 million STEP initiative offering up to €30 million in scale-up financing, faster evaluations, easier access to InvestEU Venture Debt, and a STEP Seal to unlock complementary funding. The 2025 Work Programme adds €250 million for early-stage companies in target technologies, €120 million for emerging tech guided by EIC Programme Managers, and expands Business Acceleration Services with a new Pre-Accelerator scheme for widening countries.



## Overview of the major changes to the main EIC instruments from 2025 to 2026

<b>Pathfinder</b>	Greater focus on the potential solutions described in applicants' technology visions.
<b>Transition</b>	More applicants invited to jury interviews; introduction of <b>Seal of Excellence</b> to ease access to other funding for excellent proposals with insufficient EIC budget.
<b>Accelerator</b>	<b>Investment limit reduced</b> from €15M to €10M (higher amounts via STEP Scale Up); applications must have reached <b>TRL 5</b> ; short applications evaluated monthly with results in 4–6 weeks.

The 2026 **EIC Work Programme** introduces a number of changes and simplifications, following advice from the EIC Board, the mid-term review of Horizon Europe, the policy priorities of the EU in particular the Startup and Scaleup Strategy, and experience and feedback from implementation.

### **1. Launch of an ARPA-like pilot programme - EIC Advanced Innovation Challenges for 2026–2027**

The main changes concern the introduction of pilot EIC Advance Innovation Challenges to reinforce the risk taking and user uptake of innovations. The call introduces a new pilot scheme with staged funding and closer integration of user and demand perspectives inspired by the ARPA-style approach but adapted to the Horizon Europe legal and operational framework. The 2026 EIC Work Programme provides the provisions for the implementation of Stage 1 support for this pilot. It also sets out indicative provisions for Stage 2 which is anticipated to be funded under the 2027 EIC Work Programme and is subject to the adoption of this Work Programme.

This call will be implemented through two stages of funding, a first stage open to all applicants calls for proposed solutions to the challenge, and a second stage to be funded through a call for 2027 to select a limited number of the first stage projects to proceed to implement their solutions.

**Stage 1:** €300,000 lump sum<sup>6</sup> for up to nine months to prepare and benchmark breakthrough

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<sup>6</sup> Eligible costs will take the form of a fixed lump sum defined in a Decision that will be published on the Funding and Tenders Portal by call opening.

solutions and explore their feasibility and viability. **Stage 2:** Up to €2.5 million lump sum<sup>7</sup> for up to 2.5 years to further develop the most promising solutions and test them in real world environments and with the involvement of users. The funding rate of the grants for Stage 1 and Stage 2 is 100% of the eligible costs.

**Demand-side integration:** Commercial users, end users and other major stakeholders, such as regulators, should be involved from the outset to validate use cases, enhance market relevance and encourage uptake.

**Proactive portfolio management:** A Programme Manager will oversee the portfolio, guiding projects, fostering synergies, and ensuring strategic alignment and coherent development across stages. **Total indicative budget:** EUR 6 million under 2026 Work programme for Stage 1 projects and EUR 25 million under 2027 EIC work programme in the restricted call for Stage 2 projects.

## 2. Simplified and faster Accelerator evaluation process

The EIC Accelerator evaluation process will be streamlined by shortening application forms (full proposals forms cut from 50 to 20 pages), allowing reuse from short to full stages, adding technical due diligence before the jury phase, accelerating investment decisions, and introducing regular batching with three jury weeks annually (evaluations every two months instead of every six months).

## 3. Support to Start-up and Scale-up Strategy

This includes strengthened Business Acceleration Services for internationalisation and corporate engagement.

## 4. Increased maximum grant for Pathfinder projects

Up to €4 million to boost impact. This will enable progress to the proof-of-concept stage, along with further introduction of lump-sum together with some minor improvements to the evaluation process.

## 5. Broader access to EIC Transition

It will be now open to results from Horizon research infrastructures programme, alongside EIC Pathfinder, ERC Proof of Concept, and Horizon Europe Pillar II projects.

## 6. Continuation of EIC STEP Scale-up call

for equity investments to catalyse larger investments rounds of €50 million or above to companies with pre-commitments from investors.

## 7. Launch of a Gender & Diversity Innovation Index, building on successful pilot studies.

## 8. Relaunch of the Plug-in scheme for certified national/regional programmes.

<sup>7</sup> Lump sum based on their estimated project costs as defined in the Decision of 7 July 2021 authorising the use of lump sum contributions under the Horizon Europe Programme – the Framework Programme for Research and Innovation (2021-2027) – and in actions under the Research and Training Programme of the European Atomic Energy Community (2021/2025).



## Next Multiannual Financial Framework 2028-2034

In the next Multiannual Financial Framework for 2028-2034, the budget for Innovation associated with Pillar 3 will get the highest increase compared to the current Framework Programme for Research and Innovation. The allocation will almost triple from €13.6 billion to €38.7 billion, with the EIC set to benefit the most. The EIC will be expanded with more ‘ARPA’ elements into its operations to support high risk projects. It will further develop pathways from ERC or collaborative research projects into the EIC to commercialise faster and scale up breakthrough technologies.

The Draghi Report recommends transforming the EIC into a European ARPA-style agency, with empowered programme managers, simplified governance, and significantly scaled-up funding to drive high-risk, high-reward innovation. It calls for mission-oriented challenges, innovation-friendly procurement, and stronger pathways to scale breakthroughs from prototypes to deployment<sup>8</sup>. A ‘DARPA’ approach<sup>9</sup> will also be adopted, aiming at supporting defence and dual use technologies and their scaling up operating in full complementarity with the ECF InvestEU Instrument and the EU Defence Innovation Scheme (EUDIS) activities.

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<sup>8</sup> Draghi Report, *The future of European competitiveness*, 2024

<sup>9</sup> The “DARPA approach” in the Draghi Report refers to the US model of the Defense Advanced Research Projects Agency (DARPA), and how Europe might emulate it in order to boost innovation, especially in high-risk, high-reward or “deep tech” areas.



KEY TAKEAWAYS FROM FEEDBACK AND POLICY RECOMMENDATIONS

To be drafted by the BEPA office after reviewing the feedback received. Each recommendation will be graded from Low (1) to High (5) in terms of feasibility and impact. The recommendations will be labelled according to whether they are aimed at the legal basis of the instrument or at its implementation.

		Feasibility	Impact
		(1-5)	(1-5)
Access challenges and administrative process	There is a gap between the Pathfinder’s academic focus and the Accelerator’s business-driven innovation.	4	5
Gaps in coverage	An agile, high-risk, high-reward DARPA-style funding scheme should enable both deep-tech SMEs and research groups to compete on equal footing to tackle targeted challenges. It would provide low-TRL support to startups and SMEs, accelerating high-risk innovations and generating strong success stories that can progress from Pathfinder to Transition and then Accelerator, bridging the gap between research-driven and market-driven innovation.  Disclaimer: This recommendation was made prior to the publication of the 2026 EIC Work Programme, which established the EIC Advanced Innovation Challenges in order to address this issue.		
Implementation			

		Feasibility	Impact
		(1-5)	(1-5)
Access challenges and administrative process Complementarity	Increase focus on DARPA-style challenge calls specifically targeting SMEs/startups for breakthrough chemistries not covered under Horizon Europe, to complement the existing Pathfinder → Transition → Accelerator pipeline. <b>Implementation</b>	3	4
Access challenges and administrative process	Strengthen the selection process for evaluation experts across Pathfinder, Transition, and Accelerator short applications to ensure a more balanced and technically competent assessment. <b>Implementation</b>	4	4
Gaps in coverage	Focusing on SMEs and start up could leave research institutions and academia without a program.  To ensure research institutions and academia are not excluded, an ARPA approach should be applied to management and scope rather than limiting eligible beneficiaries. This would support balanced participation across the innovation chain. <b>Implementation</b>	3	4
Speed and transparency	The EIC should improve transparency in the evaluation process by informing applicants of their interview status as soon as committee decisions are made, rather than waiting until all interviews are completed. <b>Implementation</b>	3	5
Speed and transparency	The process for communicating interview decisions should be made more transparent, as applicants currently must navigate multiple layers through NCPs and intermediaries to obtain basic information. <b>Implementation</b>	3	5

		Feasibility	Impact
		(1-5)	(1-5)
Support instruments Complementarity	Provide stronger coordination and matchmaking support during the Transition and Accelerator phases to ensure innovative technologies reach industrial-scale deployment efficiently. <b>Implementation</b>	3	4
Support instruments Relevance	Leverage dedicated investment funds alongside grant funding to de-risk scale-up and enhance commercial impact of next-generation innovations. <b>Implementation</b>	3	4

# References

- (1) [EIC Work Programme 2025](#)
- (2) [EIC Work Programme 2026](#)
- (3) [Work Programme 2025 Factsheets](#)
- (4) [EIC Funding opportunities](#)
- (5) [EIC Fund Investment Guidelines & Approach](#)
- (6) EIC Fund companies' portfolio ([Advanced Manufacturing & Advanced Materials](#) | [Energy](#) | [Mobility](#))
- (7) [European Innovation Council website](#)
- (8) [BEPA Policy Talk "How can battery innovators best navigate European Innovation Council funding opportunities?"](#)
- (9) [EIC Impact Report 2025](#)
- (10) [Fast Track scheme - Guidance document](#)
- (11) [Standard Application Form \(HE EIC TRANSITION\) - With instructions](#)
- (12) [Draghi Report, The future of European competitiveness, 2024](#)
- (13) [Regulation proposal establishing Horizon Europe, the Framework Programme for Research and Innovation, for the period 2028-2034 COM\(2025\) 543 final](#)
- (14) [European Innovation Council \(EIC\) datahub](#)
- (15) [EIC Business Acceleration Services \(BAS\)](#)

All referenced content was checked on 27/08/2025. Please contact the BEPA office if any content is currently unavailable.

