



First Trends H2020 vs FP7: winners and losers Special focus on EU13 countries

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INTRODUCTION

Based on data available on the Cordis website on 3 December 2015 and 15 May 2016, it is possible to find out how Member States' stakeholders have or haven't been (more) successful in participating in H2020 compared with FP7. The chosen way is to compare the market share (% of beneficiaries) of each Member State at EU28 level or inside the EU13 community for 14 thematic priorities.

The main trends observed are:

- EU13 market share improved by 2 points of percentage in early H2020 vs FP7,
- EU28 main winners are Slovenia, Estonia, Portugal and Spain,
- EU28 main losers are the UK, Germany and France,
- In EU13, the main winners are Slovenia, Estonia, Cyprus, Croatia and Latvia,
- In EU13, the main losers are Poland, Hungary and Bulgaria,
- In six thematic priorities, Poland has more participants than in some cases Ireland, Finland, Sweden, Denmark or Greece. This occurs for 3 thematic priorities for Slovenia and in one case for HU, CZ and RO,
- The market share of EU13 was better on 3.12.2015 than on 15.5.2016,
- On 15.5.2016, the best performance of EU13 is for the thematic priority "Societal challenges" (13.99%). Their market share for the thematic priority "Industrial leadership" is 10.06%. The market share for "Excellence in science" is 6.59%. Their performance in the field of SMEs is 13.61% vs 14.96% in FP7. Their participation in ERC is rather low, with 243% and in FET 7.39%.

Tables 1 and 2 below present data regarding the developments in the market share for EU28 Member States, as well as inside the EU15 and EU13 communities.

Tables 3 and 4 below show for a sample of 14 thematic priorities the market share of EU15 and EU13 as well as changes that have occurred between H2020 and FP7. The equivalence between FP7 and H2020 is based on the author's perception.

Tables 5 and 6 provide details on the participation per Member State in Horizon 2020 (at 15.5.2016) per thematic priority and for a selection of programmes.

Table 1: Global market share FP7 and H2020 (on 3.12.2015)

	FP7			H2020			Δ EU28 H2020-FP7	Δ EU15 H2020 - FP7
	Σ	% EU28	% EU15	Σ	% EU28	% EU15		
AT	3307	3.2	3.6	514	3.5	4.0	0.3	0.4
BE	5166	5.0	5.6	701	4.7	5.5	-0.3	-0.1
DE	13272	12.9	14.3	1810	12.3	13.9	-0.5	-0.4
DK	2682	2.6	2.9	421	2.9	3.2	0.2	0.3
ES	10021	9.7	10.8	1529	10.4	11.8	0.7	1.0
FI	2313	2.3	2.5	365	2.5	2.8	0.2	0.3
FR	10903	10.6	11.7	1339	9.1	10.3	-1.5	-1.4
EL	3552	3.5	3.8	480	3.3	3.7	-0.2	-0.1
IE	2110	2.1	2.3	322	2.2	2.4	0.2	0.1
IT	9345	9.1	10.0	1328	9.0	10.2	-0.1	0.2
LU	240	0.2	0.3	76	0.5	0.5	0.3	0.2
NL	7297	7.1	7.8	1053	7.2	8.1	0.1	0.3
PT	2163	2.1	2.3	387	2.6	3.0	0.5	0.7
SE	4028	3.9	4.3	547	3.7	4.2	-0.2	-0.1
UK	16630	16.1	17.8	2136	14.5	16.4	-1.6	-1.4
EU15	93029	90.4	100	13008	88.4	100		0
			% EU13			% EU13		Δ EU13 H2020 - FP7
BG	606	0.6	6.1	98	0.7	5.8	0.1	-0.3
CY	484	0.5	4.9	107	0.7	6.3	0.2	1.4
CZ	1307	1.2	13.2	214	1.5	12.6	0.3	-0.6
EE	549	0.5	5.5	121	0.8	7.1	0.3	1.6
HU	1478	1.4	14.9	204	1.4	12.0	0.0	-2.9
HR	384	0.4	3.9	79	0.5	4.7	0.1	0.8
LT	367	0.4	3.7	63	0.4	3.7	0.0	0.0
LV	274	0.3	2.7	70	0.5	4.1	0.2	1.4
MT	186	0.2	1.8	33	0.2	1.9	0.0	0.1
PL	2082	2.0	21.0	293	2.0	17.2	0.0	-3.8
RO	956	0.9	9.6	149	1.0	8.8	0.1	-0.8
SK	436	0.4	4.4	94	0.6	5.5	0.2	1.1
SL	809	0.8	8.2	175	1.2	10.2	0.4	2.0
EU13	9918	9.6	100	1700	11.6			
EU28	102947	100		14708	100	100		0

Table 2: Global market share FP7 and H2020 (on 15.5.2016)

	FP7			H2020			Δ EU28 H2020-FP7	Δ EU15 H2020 - FP7
	Σ	% EU28	% EU15	Σ	% EU28	% EU15		
AT	3307	3.2	3.6	744	3.5	3.9	0.3	0.3
BE	5166	5.0	5.6	1049	4.9	5.5	-0.1	-0.1
DE	13272	12.9	14.3	2626	12.2	13.7	-0.7	-0.6
DK	2682	2.6	2.9	633	2.9	3.3	0.3	0.4
ES	10021	9.7	10.8	2231	10.4	11.7	0.7	0.9
FI	2313	2.3	2.5	518	2.4	2.7	0.1	0.2
FR	10903	10.6	11.7	1982	8.9	10.4	-1.7	-1.3
EL	3552	3.5	3.8	712	3.3	3.7	-0.2	-0.1
IE	2110	2.1	2.3	498	2.3	2.6	0.2	0.3
IT	9345	9.1	10.0	1994	9.3	10.4	0.2	0.4
LU	240	0.2	0.3	113	0.5	0.6	0.3	0.3
NL	7297	7.1	7.8	1525	7.1	8.0	0.0	0.2
PT	2163	2.1	2.3	567	2.6	3.0	0.3	0.7
SE	4028	3.9	4.3	764	3.6	4.0	-0.3	-0.3
UK	16630	16.1	17.8	3160	14.7	16.5	-1.4	-1.3
EU15	93029	90.4	100	19116	88.7	100		0
			% EU13			% EU13		Δ EU13 H2020 - FP7
BG	606	0.6	6.1	138	0.6	5.7	0.0	-0.4
CY	484	0.5	4.9	146	0.7	6.0	0.2	1.1
CZ	1307	1.2	13.2	295	1.4	12.2	0.2	-1.0
EE	549	0.5	5.5	168	0.8	6.9	0.3	1.4
HU	1478	1.4	14.9	274	1.3	11.3	-0.1	-3.6
HR	384	0.4	3.9	121	0.6	5.0	0.2	1.1
LT	367	0.4	3.7	99	0.5	4.1	0.1	0.4
LV	274	0.3	2.7	98	0.5	4.1	0.2	1.4
MT	186	0.2	1.8	42	0.2	1.7	0.0	-0.1
PL	2082	2.0	21.0	436	2.0	18.0	0.0	-3.0
RO	956	0.9	9.6	235	1.1	9.7	0.2	0.1
SK	436	0.4	4.4	127	0.6	5.2	0.2	0.8
SL	809	0.8	8.2	245	1.1	10.1	0.3	1.9
EU13	9918	9.6	100	2424	11.3	100		0
EU28	102947	100		21540	100	100		

Table 3: EU15 vs EU13 - Thematic priorities FP7 vs 2020 (on 3.12.2015)

Theme	FP7					H2020					Δ H2020 - FP7 for EU13
	EU28	EU15		EU13		EU28	EU15		EU13		
	Nr	Nr	%	Nr	%	Nr	Nr	%	Nr	%	
Health	8342	7770	93.14	572	6.86	1178	1041	88.37	137	11.63	4.77
KBBE (Food & Bio)	5215	4643	89.03	572	10.97	779	674	86.52	105	13.48	2.51
Energy	2746	2500	91.04	246	8.96	1115	956	85.74	159	14.26	5.30
Environment	4930	4419	89.63	511	10.37	593	511	86.17	82	13.83	3.46
Transport	5478	4931	90.01	547	9.99	829	739	89.14	90	10.86	0.87
Space	2119	1919	90.56	200	9.44	431	385	89.33	46	10.67	1.23
Σ Societal Challenges	28830	26182	90.57	2648	9.43	4925	4306	87.55	619	12.46	3.02
ICT	13279	12168	91.63	1111	8.37	1752	1589	90.70	163	9.30	0.93
NMP (Nano. Advanced Manufacturing & Materials)	6876	6220	90.46	656	9.54	1200	1084	90.33	116	9.67	0.13
Σ Industrial Leadership*	20155	18388	91.05	1767	8.96	2952	2673	90.52	279	9.49	0.53
Σ SME	7487	6367	85.04	1120	14.96	1376	1198	87.06	178	12.94	-2.02
Σ ERC	4722	4612	97.67	110	2.33	968	943	97.41	25	2.59	0.26
Σ other themes	10183	8603	84.06	1580	16.94	1849	1509	80.2675	340	19.7325	2.79
Science in Society	1569	1271	81.01	298	18.99	211	153	72.51	58	27.49	8.50
Security	2965	2616	88.23	349	15.77	400	341	85.25	59	14.75	-1.02
SSH	2372	1983	83.6	389	16.4	385	311	80.78	74	19.22	2.82
Infrastructure	3277	2733	83.4	544	16.6	853	704	82.53	149	17.47	0.87
Σ of the 14 thematic priorities	71377	64152	88.89	7225	11.11	12070	10629	86.56	1441	13.44	2.34

* ICT&NMP is only part of the Industrial Leadership under H2020

Table 4: EU15 vs EU13 – Thematic priorities FP7 vs 2020 (on 15.5.2016)

Theme	FP7					H2020					Δ H2020 – FP7 for EU13
	EU28	EU15		EU13		EU28	EU15		EU13		
	Nr	Nr	%	Nr	%	Nr	Nr	%	Nr	%	
Health	8342	7770	93.14	572	6.86	1746	1570	89.92	176	10.08	4.77
KBBE (Food & Bio)	5215	4643	89.03	572	10.97	1114	951	85.36	163	14.63	3.66
Energy	2746	2500	91.04	246	8.96	1916	1606	83.82	310	16.18	7.22
Environment	4930	4419	89.63	511	10.37	1036	888	85.71	148	14.29	3.92
Transport	5478	4931	90.01	547	9.99	1065	954	89.58	111	10.42	0.43
Space	2119	1919	90.56	200	9.44	656	594	90.55	62	9.45	0.01
Σ Societal Challenges	28830	26182	90.57	2648	9.43	7533	6563	87.12	970	12.88	3.45
ICT	13279	12168	91.63	1111	8.37	2678	2446	91.34	232	8.66	0.29
NMP (Nano. Advanced Manufacturing & Materials)	6876	6220	90.46	656	9.54	984	886	90.04	98	9.96	0.42
Σ Industrial Leadership*	20155	18388	91.05	1767	8.96	3662	3332	90.99	330	9.01	0.05
Σ SME	7487	6367	85.04	1120	14.96	1851	1599	86.39	252	13.61	-1.35
Σ ERC	4722	4612	97.67	110	2.33	1574	1538	97.71	36	2.29	-0.04
Σ other themes	10183	8603	84.06	1580	16.94	2601	2140	82.28	461	17.72	0.78
Science in Society	1569	1271	81.01	298	18.99	311	238	76.53	73	23.47	4.48
Security	2965	2616	88.23	349	15.77	709	612	86.32	97	13.68	-2.09
SSH	2372	1983	83.6	389	16.4	726	580	79.89	146	20.11	3.71
Infrastructure	3277	2733	83.4	544	16.6	855	710	83.04	145	16.96	0.36
Σ of the 14 thematic priorities	71377	64152	88.89	7225	11.11	17127	15078	88.04	2049	11.96	0.85
Spreading excellence and widening participation						359	240	66.85	119	33.15	

* ICT&NMP is only part of the Industrial Leadership under H2020

Table 5: Thematic priorities H2020 First Trends: Data of 19.05.2016

	Excellence in Science	Industrial Leadership	Societal Challenges	Spreading Excellence and Widening Participation	Science in Society	EURATOM	TOTAL
AT	208	195	320	14	25	3	765
BE	258	275	476	14	23	20	1.066
DE	915	805	914	41	25	23	2.723
DK	253	137	263	7	10	3	673
ES	634	841	914	11	25	14	2.439
FI	139	171	211	9	7	12	549
FR	783	553	646	16	16	27	2.041
EL	164	224	315	5	12	4	724
IE	170	162	188	3	7	1	531
IT	538	733	841	29	24	11	2.176
LU	17	35	52	7	2	0	113
NL	588	350	608	17	18	12	1.593
PT	148	150	244	26	8	5	581
SE	242	210	331	8	6	14	811
UK	1.601	705	920	34	30	13	3.303
EU15	6658	5.546	7.243	240	238	162	20.087
BG	22	26	74	5	7	7	141
CY	38	30	56	13	8	1	146
CZ	82	65	115	10	8	19	299
EE	24	49	84	17	5	4	183
HU	60	73	156	10	8	6	313
HR	22	16	72	7	4	2	123
LT	18	31	40	2	3	9	103
LV	11	23	56	6	2	3	101
MT	5	7	19	5	5	5	46
PL	95	128	193	17	15	5	453
RO	36	48	129	13	5	5	236
SK	23	30	59	8	4	8	132
SI	34	94	125	6	7	5	271
EU13	470	620	1.178	119	81	79	2.547
EU28	7.128	6.166	8.421	359	319	79	22.634
Nb. projects	4.462	2.345	1.991	115	42	24	8.979

Table 6: Selection of programmes H2020 First Trends: Data of 19.5.2016

	ICT	NANO	ADV. MAT	BIO	ADV. MANU	SPACE	HEALTH	FOOD	ENER	TRANS	ENV	SOCI	SECU	ERC	SME	FET	SPRED EXC & WID. PART.	SC IN SOC	RISK FIN	INFRA
AT	100	15	7	3	29	18	60	25	94	47	35	28	29	36	35	20	14	25	0	27
BE	123	21	13	2	40	42	93	56	107	66	65	42	42	46	35	17	14	23	2	34
DE	377	40	31	15	124	82	210	93	225	133	91	79	66	271	171	58	41	25	3	93
DK	48	12	6	6	11	9	65	46	66	26	30	18	12	44	60	8	7	10	0	18
ES	325	68	28	15	91	78	163	140	234	112	125	53	75	113	347	30	11	25	1	66
FI	81	11	9	1	26	12	46	31	44	17	35	18	19	24	55	9	9	7	1	33
FR	264	29	20	9	54	95	150	98	136	96	77	40	41	191	121	50	16	16	0	88
GR	132	10	6	0	33	25	56	39	60	33	34	43	46	5	24	13	5	12	1	43
IRL	81	12	4	3	15	10	40	44	45	8	16	14	20	27	49	6	3	7	0	20
IT	258	69	29	4	80	94	161	110	182	123	107	76	76	94	295	34	29	24	1	76
LU	17	2	4	0	5	3	6	1	12	15	1	8	9	3	10	0	7	2	0	1
NL	151	30	13	9	52	28	169	86	104	82	79	35	39	157	80	23	17	18	3	63
PT	68	15	10	6	17	17	42	41	52	21	37	20	30	21	35	9	26	8	0	30
SE	89	15	12	3	27	15	86	40	62	42	49	23	22	51	68	19	8	6	0	37
UK	332	53	22	9	68	66	223	101	178	133	107	83	86	363	214	55	34	30	2	81
EU15	2446	402	214	85	672	594	1570	951	1606	954	888	580	612	1538	1599	351	240	238	14	710
BG	7	3	1	0	1	3	4	9	34	3	6	9	9	0	16	2	5	7	0	11
CY	10	2	1	0	7	6	9	4	14	4	11	7	7	5	6	1	13	8	0	5
CZ	26	3	3	2	11	10	21	16	30	13	16	10	7	9	12	6	10	0	0	29
EE	18	2	1	2	1	5	15	15	16	7	10	12	9	1	34	1	17	5	0	6
HR	5	0	0	1	0	1	9	7	31	5	6	10	4	2	10	3	7	4	0	6
HU	30	5	1	0	6	3	30	24	23	17	16	21	5	9	43	2	10	8	0	21
LT	8	3	3	0	4	3	0	9	13	5	6	9	0	0	17	0	2	3	0	6
LV	8	3	2	0	3	3	10	12	19	3	3	6	3	0	7	0	6	2	1	5
MT	1	1	0	0	0	2	0	3	6	1	4	3	2	0	4	0	5	5	0	2
PL	49	7	3	1	22	16	33	28	39	23	23	25	21	4	44	8	17	15	0	27
RO	22	3	1	0	2	4	16	19	37	9	18	10	19	3	15	0	13	5	0	15
SI	36	5	3	3	15	4	19	10	34	18	21	14	5	1	38	3	6	7	0	9
SK	12	3	3	1	4	2	10	7	14	3	8	10	6	2	11	2	8	4	0	9
EU13	232	40	22	10	76	62	176	163	310	111	148	146	97	36	252	28	119	73	1	145
EU28	2678	442	236	95	748	656	1746	1114	1916	1065	1036	726	709	1574	1851	379	359	311	15	855
NB. PRO	686	184	36	38	117	166	415	239	456	344	237	136	139	1576	1596	77	115	42	6	100

