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EIT Impact Study

Final report

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List of abbreviations

AI	Artificial Intelligence
AIC	Adaptation Investment Cycle
CAPEX	Capital expenditure
CCC	Climate City Contract
CEF	Connecting Europe Facility
CEO	Chief Executive Officer
CFO	Chief Financial Officer
CINEA	European Climate, Infrastructure and Environment Executive Agency
CLCs	Co-Location Centres
COO	Chief Operating Officer
COP	United Nations Climate Change Conference (Conference of the Parties)
CPE	Citizen and Patient Engagement
CRMA	Critical Raw Materials Act
CRMs	Critical Raw Materials
DESI	Digital Economy and Society Index
DGs	Directorates-General
DoH	Declaration of Honour
EBA	European Battery Alliance
EC	European Commission
EDIH	European Digital Innovation Hub
EEA	European Environment Agency
EEN	Enterprise Europe Network
EFSA	European Food Safety Authority
EHDS	European Health Data Space
EIB	European Investment Bank
EIC	European Innovation Council
EIF	European Investment Fund
EIGE	European Institute for Gender Equality
EIS	European Innovation Scoreboard
EISMEA	European Innovation Council and SMEs Executive Agency
EIT	European Institute of Innovation and Technology
ENA	European Nutrition Association
EPO	European Patent Office
ERA	European Research Area
ERDF	European Regional Development Fund
ERMA	European Raw Materials Alliance
ESIA	European Solar Photovoltaic Industry Alliance
ETS	Emissions Trading System
EUAN	European Union Agency Network
EURES	European Employment Services
EV	Electric vehicle
FAN	EIT Food Accelerator Network
FAO	Food and Agriculture Organisation
FBDGs	Food-Based Dietary Guidelines
FS	Financial Sustainability

FTE	Full-time equivalent
GDP	Gross Domestic Product
GEP	Gender Equality Plan
GHG	Greenhouse Gas (or GHG emissions)
GWh	Gigawatt-hour
HE	Horizon Europe
HEI	Higher Education Institution
ICT	Information and Communication Technology
IoT	Internet of Things
IPCC	Intergovernmental Panel on Climate Change
JRC	Joint Research Centre
KAVA	KIC Added Value (implied in KAVA projects)
KIC	Knowledge and Innovation Community (or KICs for plural)
KPI	Key Performance Indicator
KTI	Knowledge Triangle Integration
LCA	Life Cycle Analyses
LCOE	Levelized Cost of Energy
LEs	Legal Entities
LLL	Lifelong Learning
LYG	Life Years Gained
MOOC	Massive Open Online Course
MoU	Memorandum of Understanding
NCD	Non-communicable disease
NPV	Net Present Value
OECD	Organisation for Economic Co-operation and Development
PPP	Purchasing Power Parity
PV	Photovoltaic
P2R	Pathways2Resilience
R&I	Research and Innovation
RIS	Regional Innovation Scheme (or EIT RIS)
ROI	Return on Investment
RRF	Recovery and Resilience Facility
RRJ	Regional Resilience Journey
SDG	Sustainable Development Goal
SEED	Seedbed Incubator Programme
SIA	Strategic Innovation Agenda
SCI	Spinal cord injury
SMEs	Small and Medium-sized Enterprises
SO	Strategic Objective
STEM	Science, Technology, Engineering, and Mathematics
SUPD	Single-Use Plastics Directive
tCO_2-eq	Tonnes of CO_2-equivalent
ToC	Theory of Change
TRL	Technology Readiness Level
TWh	Terawatt-hour
UN	United Nations
UNFCCC	United Nations Framework Convention on Climate Change
WSL	Wider Society Learning

Executive Summary

This study was commissioned by the **European Institute of Innovation and Technology (EIT)**. It provides a **strategic appraisal of the economic and societal impacts** generated by eight of the **EIT Knowledge and Innovation Communities (KICs)** (EIT Climate-KIC, EIT Digital, EIT InnoEnergy, EIT Health, EIT RawMaterials, EIT Food, EIT Manufacturing and EIT Urban Mobility)[1] from their inception to the end of 2024. The scope is global, but with a primary focus on Europe's innovation landscape. Overall, the evidence shows that **the EIT and its KICs have generated measurable economic and societal impacts** in Europe since their inception, with effects extending beyond direct outputs to broader innovation-system outcomes.

The study was anchored in the **EIT Impact Framework** that was adopted in 2022 and aligned with the **EIT Strategic Innovation Agenda 2021–2027**, and assessed impacts against a selected set of the **Framework's 90+ key performance indicators** (including 61 that are KIC-specific). It utilises indicators to position KIC activities, outcomes, and added value within the European innovation ecosystem, and to attribute the observed impacts to EIT-supported initiatives.

Importantly, the impacts reported in this study are not only the result of individual projects, but also of the EIT model as an ecosystem-based innovation system. The EIT's distinctive Knowledge Triangle approach (business, education, and research) supports collaboration across communities and sectors and helps translate operational outputs into broader innovation-system outcomes. **This is reflected in the development of visible innovation ecosystems not previously in existence**, with the EIT investing in viable innovation ecosystems by establishing bridges between different professional groups and setting the ground for collaboration between key drivers of a knowledge-based society. **This ecosystem logic is reinforced through a place-based dimension, including the EIT Regional Innovation Scheme (EIT RIS)[2],** which is designed to strengthen local and regional innovation capacity while remaining connected to the wider EIT community.

Analysis was structured around three dimensions that reflect the breadth and diversity of the KIC thematic domains: **direct operational outputs**, **economic impact**, and **societal impact**. By tracing the interlinkages between these dimensions (how immediate outputs can translate into wider economic impact and, in turn, into societal impacts), the study built a comprehensive picture of how the EIT and its KICs strengthen Europe's innovation capacity.

The study methodology was designed to utilise the widest range of data sources, carefully address potential data gaps, and ensure a comprehensive and accurate assessment of impact. A mixed-methods approach combined quantitative methods, such as desk research, surveys, KPIs, and econometric analysis, with qualitative methods, including interviews with key stakeholders and case studies.

Work proceeded through interconnected tasks: an inception phase, desk research, economic impact data collection and analysis, societal impact data collection and analysis, and impact attribution. Despite efforts to ensure data triangulation and the robustness of the findings, some limitations emerged, including the availability of data and other complexities that impacted the results. Therefore, the study results must be treated with reasonable caution and not interpreted outside the economic and societal context in which EIT and its supported KICs operate.

Previous evaluations and studies of EIT impact consistently found that the EIT has generated significant added value for the EU innovation ecosystem. EIT-supported ventures show higher survival and growth rates compared

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[1] The first wave of KICs have reached the end of the 15-year EIT grant support and respectively changed names as of 2025: Climate KIC (previously EIT Climate-KIC), 28Digital (previously EIT Digital), InnoEnergy (previously EIT InnoEnergy).
[2] EIT RIS is the main tool for reducing regional innovation gaps across Europe. Launched in 2014, RIS supports innovators, builds local capacity, and integrates regional actors into pan-European networks.

with market averages, and KICs have accelerated technology transfer, strengthened regional innovation networks, and enhanced the entrepreneurial skills of students and researchers.

Evaluations highlighted substantial economic contributions, including job creation, increased private investment leveraged through EIT funding, and stronger cross-border collaboration. They concluded that the EIT plays a unique role in addressing skills gaps, particularly by embedding entrepreneurship in higher education programmes and fostering interdisciplinary collaboration. Overall, their conclusions underscored that the EIT is a key driver of European innovation capacity, demonstrating strong relevance, clear EU added value, and high potential for further scaling up within Horizon Europe.

The previous findings have been strongly echoed in this study and are further elaborated regarding EIT's economic and societal impacts. The **economic impact analysis** reveals a consistent, positive contribution across three key dimensions: generating innovation-based growth, creating employment, and leveraging investments in research and innovation. By generating innovation-based growth, the KICs have strengthened Europe's innovation capacity through their unique approach to the Knowledge Triangle (comprising business, education, and research) across priority sectors. Key outcomes are:

- While revenue reporting of KIC-supported companies is incomplete, the subset of firms with full series (around one-tenth of all supported) shows **EUR 1,13 billion in cumulative revenue growth**, a 104% increase over the baseline target.
- **43% of the supported companies with a complete data can be considered as high-growth enterprises,** achieving an average annualised growth of more than 10% over a three-year period.
- The **total cumulative reported revenues** of the companies after the KICs' support amounted **EUR 6,28 billion**. The figure is incomplete due to missing data and delays in reporting. These results reflect not only financial effects, but also the systemic value of the EIT's ecosystem-based model, including the development of innovation networks and collaboration capacity.
- **Survival rate of the KIC-supported companies is estimated at over 90%.**
- Beyond monetary effects, the KICs have deepened Europe's innovation capacity:
    - **1 144 start-ups were created, and 9 438 start-ups and scale-ups were supported.**
    - There were **130 101 graduates from EIT-labelled programmes**, including 7 468 Master's and PhD graduates.
    - A **network of 2 283 active partners**[3] was recorded in 2023–2025.
    - Through their education programmes, **the KICs mitigate critical European skills gaps by combining advanced STEM and digital training with entrepreneurship and leadership development**, thereby strengthening industrial competitiveness, the ICT talent base, and the green transition.
- In terms of employment creation, **headcounts in KIC-created or supported start-ups/scale-ups reached 92 694 in 2023** among companies with available data:[4]

[3] The term *active partners* includes all entities that participate in projects of the KICs within their business plans. They are counted as unique partners, based on the data reported by the EIT KICs for the grant cycle 2023-2025. The KICs may have more partnerships, for example with entities paying memberships fees to the KICs but only passively benefitting from the network or events. Those are not counted as active partners.
[4] Only about half of the companies created or supported by KICs have made their data available. Therefore, the employment in the supported start-ups/scale-ups is likely to be underestimated.

- The difference between the maximum and minimum number of employees in KIC-supported companies **suggest overall employment growth of 69 013 employees. 51% of supported companies recorded an employment growth.** Overall, the KIC-supported ventures **demonstrate substantially stronger employment dynamics compared to the EU-wide trends.**
- The study investigated the **number and type of jobs in existing businesses sustained through innovations**. Although data coverage was limited, **910 sustained jobs** were reported across companies supported by the KICs.
- The study also found that some of the companies previously supported are no longer in operation and, therefore, part of the employment created was subsequently lost. The indicator on **the number and type of skill gaps and/or skill shortages filled by the KIC sector** was difficult to assess due to data limitations.

- Results of an online survey conducted by the JRC in mid-2025[5] were used to assess indicators related to the **career growth** of participants in **EIT-labelled education**. Among respondents, 30% reported completing a higher level of education than previously attained; 66% indicated that EIT-labelled programmes helped them "extremely" or "very much" to develop skills, networks, or support for entrepreneurship and innovation; and 21% reported an increase in their annual net income[6].
- Regarding **entrepreneurship**, 25,2% of respondents stated that they had either joined a start-up or founded one after completing an EIT-labelled programme. Employment outcomes were positive: 65% expressed a favourable view of their post-programme employment status and workplace. More than half reported **annual earnings between EUR 30,000 and EUR 50,000**.
- In leveraging investment for research and innovation, the KICs are mobilising **substantial non-EIT financing and advancing toward financial sustainability**. They leverage additional public and private investment through membership fees, partner contributions, and revenues from innovations, products and services, as well as equity-related returns, aiming to achieve independence from EIT funding by the fifteenth year of operation. Overall, **financial sustainability is developing broadly as projected**, with minor deviations in some KICs; those that have passed the fifteen-year support period report significant increases in non-EIT financing in recent reporting years. **All first-wave KICs (EIT Climate-KIC, EIT Digital, and EIT InnoEnergy) are already financially sustainable**. EIT Climate-KIC and EIT InnoEnergy have achieved a financial sustainability coefficient of over 150%.

The **societal impact analysis** confirms that **EIT addresses major global challenges** and that **KICs contribute across the green, digital, health and industrial transitions**, while **strengthening gender mainstreaming and regional cohesion**. The analysis of a specific KPI (EITHE14)[7] demonstrated that a substantive share of the EIT portfolio is explicitly invested in activities related to global challenges: climate change, biodiversity, clean air, digital transformation, Sustainable Development Goals (SDGs), health, and European strategic autonomy and economic resilience. Some KICs sustain broad, multi-dimensional engagement with these priorities (notably EIT Climate-KIC and EIT Urban Mobility), while others take more specialised or evolving approaches consistent with their mandates.

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[5] Online survey conducted by the JRC in mid-2025 among graduates of EIT-labelled Master's and doctoral programmes (297 respondents; response bases vary by question).
[6] It should be noted, however, that the respondent sample in the JRC study was non-representative. Details are discussed further in the report.
[7] EITHE14 monitors the proportion of the EIT's funding portfolio explicitly invested in these areas. It provides insights into how and to what degree the EIT grants are aligned with EU and global policy frameworks and needs, serving as a proxy for relevance to broader societal challenges.

The connection between the thematic areas covered by the KICs and their impact on the SDGs (KPI EITHE15)[8] was evident, though differences among the KICs emerged. **Climate Action (SDG 13)** is the most consistently reported area of strong positive impact across most KICs. Digital tools are increasingly integrated into health and green innovations, while advances in food, energy, and raw materials directly support health outcomes and environmental goals. Across the portfolio, **all KICs contribute to the green and digital transitions through activities such as decarbonisation, process digitalisation,** and circular economy practices. **63% of KIC projects contribute directly to green transition goals, signalling strong thematic coherence with Horizon Europe** thematic clusters and missions.

The **EIT embeds gender mainstreaming across its activities**. The **EIT Gender Equality Policy** commits to a gender-responsive portfolio, and the **Gender Equality Plan (GEP)**, adopted in December 2022, sets out the roadmap for 2022–2024. **KICs have introduced measures** to improve gender balance in programmes, governance and results, and to integrate the gender dimension into innovation content. **All EIT GEP participation targets were met**, including a minimum of **40% women in KIC decision-making bodies.** However, representation at the executive and senior management levels continues to vary by KIC.

Regional cohesion is pursued primarily through the **Regional Innovation Scheme (RIS),** and **each KIC implements a regional strategy to strengthen ties with national, regional and local actors**. This place-based delivery logic enables KIC activities to be embedded in local and regional ecosystems while leveraging pan-European networks and cross-border collaboration to scale results. Between 2021 and 2024, in RIS-eligible countries, the EIT supported **over 4 000 start-ups and scale-ups, developed 718 innovations and graduated more than 300 000[9] students and learners**. By October 2024, the number of active **KIC partners from RIS countries had reached 1 212**.

The analysis of **EIT Climate-KIC** highlighted system-level progress across its strategic objectives of systemic innovation, sustainable ecosystems, entrepreneurship and skills, investment mobilisation, and climate-friendly employment. Key achievements include:

- **100+ regions supported on adaptation (potentially reaching up to 53 million people).**
- **14 000+ people trained in adaptation.**
- **EUR 1,19 billion investment attracted to its supported startups**.[10]
- **21 000 jobs supported,** created or sustained by 2024.

To assess progress in enabling cities, regions, countries and large businesses to act at the required speed and scale, the indicator *# number of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve **rapid decarbonisation and resilience*** was used. By 2024, **43 collaboration agreements, Memoranda of Understanding (MoUs), or formal contracts had been signed to establish the foundations for strategic partnerships, surpassing the target of 30** and signalling overperformance, and with a solid trajectory toward the 2027 target of 50.

EIT Climate-KIC reported: (1) a leading role in the EU Cities Mission[11] via NetZeroCities,[12] which has supported 112 cities in 35 countries, with 92 cities awarded the EU Mission Label; (2) involvement in the EU Mission on

[8] EITHE15 measures the impact of KICs on achieving the UN SDGs. This KPI is based on the self-assessment of KICs, which annually report the SDGs where their activities have generated an impact.
[9] The number includes students and learners of EIT-labelled programmes as well as those of non-labelled programmes.
[10] EITHE06 value as reported by Climate-KIC and validated by EIT in the KPI reporting.
[11] The Mission 100 Climate-Neutral and Smart Cities by 2030 is a bold EU initiative aiming to transform at least 100 European cities into climate-neutral, sustainable, and digitally advanced urban centres by 2030.
[12] The NetZeroCities project (10.2021-9.2025) is coordinated by EIT Climate-KIC. It is an initiative under the Horizon 2020 Research and Innovation Programme, established to support the objectives of the European Green Deal and the Mission within the Horizon Europe framework.

Adaptation[13] through Pathways2Resilience,[14] including a seven-month outreach campaign that reached 200+ regions and communities and led to the selection of the first 40 regions for support; (3) implementation of Deep Demonstrations[15] delivering targeted support in Slovenia (circular economy), Ireland (agri-food and bio-based value chain), and Gipuzkoa, Spain (mobility and food).

Regarding **funding leveraged to support scale-up and diffusion of climate innovations** (*# Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change*), reported figures indicate more than EUR 1 billion of cumulative validated investment attracted by supported ventures 2017-2024), including approximately EUR 117 million attracted by EIT RIS start-ups/scale-ups supported (2017-2024). However, given the layered financing from EU/national programmes, as well as private investors, this should be read as a contribution rather than a sole attribution.

For **EIT Digital**, the analysis indicates strong delivery across five areas: the competitiveness of EU Member States, digital talent development in Europe, digital upskilling of European professionals, gender equality in digital education, and influence on Digital Innovation Hubs. Key achievements include:

- The **launch of 692 products and services.**
- A **network of over 440 partners.**
- **Support for 784 start-ups and scale-ups.**
- **The creation of approximately 15 000 direct and indirect jobs** since 2010.
- **A 35% increase in partnership projects** in 2024.

EIT Digital has made **some progress in increasing participation from less digitally advanced Member States**. The study found that the *# level of participation of Member States with the Digital Economy and Society Index (DESI) lower than 50 in EIT Digital Activities (e.g., through RIS programme)* rose in 2021-2022, declined in 2023, and the 2024 target (+100% participation) was not achieved. The adoption of the EIT Digital Master School model, the Industrial Doctoral School model and the EIT Quality Label by European technical universities was assessed directly through the number of institutions partnering with EIT Digital. Both the 2024 and 2027 targets were achieved as **23,9% of Europe's 184 technical universities were in a partnership with EIT Digital**.

For digital upskilling of European professionals, two indicators were used*: # of EIT Digital professional and online learners*, and *# of new micro-credentials developed by EIT Digital-supported universities*. About **472 000 learners were reached** (versus a 1 000 000 target for 2024), and approximately **25 500 micro-credentials[16] were issued** (vs 50 000 planned), indicating substantial reach but below interim milestones.

Despite the shortfall in numeric targets, the evidence indicates a significant **impact on Europe's digital talent base**. Learners acquired targeted skills in areas directly aligned with Europe's strategic digital needs, including artificial intelligence, data science, cybersecurity, cloud and edge computing, digital transformation management, and entrepreneurial and innovation competencies. The micro-credentials address well-documented **digital skill**

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[13] The Mission on Adaptation to Climate Change is a European Union initiative, which aims at supporting at least 150 regions and communities in building climate resilience by 2030.
[14] Pathways2Resilience (P2R) project (1.2023-12.2027) aims to assist at least 100 regions and communities in co-designing resilience pathways and innovation agendas. P2R is coordinated by EIT Climate-KIC.
[15] Deep Demonstrations are a strategic initiative developed by EIT Climate-KIC as part of its "Transformation, in Time" approach, launched in 2019. They serve as real-world pilots to explore how systems innovation can be applied to support transformative climate action in specific places, sectors, or value chains.
[16] The European Council Recommendation (2022) defines a micro-credential as: "*a record of learning outcomes that a learner has acquired following a short learning experience, assessed against transparent standards, and which is recognised by issuing institutions*."

gaps identified at the EU level – particularly shortages in advanced ICT skills and the need to upskill professionals in non-tech sectors undergoing digitalisation.

Survey evidence from EIT Digital also suggests that **learners report improved employability, increased confidence in applying digital tools, and stronger innovation capacities**. As such, the initiative makes a meaningful contribution to strengthening Europe's digital workforce and supports broader EU objectives under the Digital Decade and the Pact for Skills.

Increased gender equality in digital education in Europe was assessed through checking the *# % of women students in EIT Digital programmes* (target: 40% by 2024, and 50% by 2027) together with *# average DESI for Human Capital development in Europe*, reflecting system-level progress through trends in gender representation in STEM and ICT professions (target: 35% by 2024 and 40% by 2027). None of the targets related to these indicators have been met, indicating that **structural gender barriers persist**. Finally, the *# presence of EIT Digital partners among the European Digital Innovation Hubs (EDIHs)* was not examined due to a lack of data, although **EIT Digital's direct involvement in the EDIHs network was generally found to be significant**.

The analysis finds **solid delivery against the current EIT InnoEnergy's strategic objectives** to build a trusted sustainable-energy ecosystem and scale strategic value chains, with continued progress toward serving as a Green Deal implementation vehicle, strengthening financial sustainability, expanding transatlantic reach, consolidating RIS coverage, and mobilising a senior industry leadership community. Key achievements include:

- A partner base of **over 1 400 organisations across 23 Member States.**
- **Support to approximately 450 ventures.**
- **EUR 9,5 billion of investment leveraged**, **255 patent applications**.
- **Leadership** in the European Battery Alliance, the European Solar PV Industry Alliance and the European Green Hydrogen Acceleration Centre.
- A growing skills pipeline (**1 746 EIT-labelled Master's graduates; 32 000+ professionals reskilled; 100 000+ non-labelled learners**).
- Contribution to **EUR 9,1 billion in energy cost savings** through support for start-ups and industrial alliances.

Four societal-impact areas were examined. To ensure the workforce in the InnoEnergy field (*# % of alumni who continue their work in the InnoEnergy field, specifically in the battery sector*), InnoEnergy is building a skilled battery workforce and creating clear pathways into the value chain. **94% of EIT-labelled graduates are employed within six months, and 77% work in sectors that are aligned with their programme**.

On gender balance promoted in the InnoEnergy field (*# survival rate of a venture managed by a woman entrepreneur (%)* and *# investment attracted by women entrepreneurs*), the **portfolio of women-led ventures shows survival rates above target of 75%** and **investment volumes well above typical market shares for women founders**[17], indicating progress at overcoming residual structural gaps.

For **increased access to innovative energy** (*# people with access to energy in developing countries thanks to InnoEnergy deployed assets*), EIT InnoEnergy provided **access to energy for 503 615 households worldwide in 2022, exceeding the 2027 target** (324 000 people with access to energy in developing countries thanks to EIT InnoEnergy deployed assets). This shows how innovation-driven, decentralised solutions (combining strategic

[17] Between 2017 and 2023, they attracted EUR 2 148 961 078,80 of investment.

investment, local deployment and capacity building) can complement large infrastructure programmes in settings where grid expansion is slow or uneconomic.

On resources leveraged for sector growth (*# external funds raised by supported assets; # the value-added of the EIT InnoEnergy, as reported in the financial statements*), by 2022, EIT InnoEnergy-supported ventures had attracted nearly **EUR 9,5 billion in cumulative external funding** (advancing toward the 2027 target of EUR 12,8 billion) and in addition the KIC **generated EUR 194 million in financial-sustainability revenues** (toward a EUR 250 million target) between 2017 and 2024. These results indicate a strong leverage effect relative to EIT InnoEnergy's own funding base.

Evidence shows strong progress on **EIT Health's** agenda, including improved health for citizens, more sustainable healthcare systems, and a more competitive healthcare economy. Key results include **2 285 ventures supported** that together attracted: **EUR 1,993 billion in funding**; **1 373 direct and 13 500 indirect jobs created**; **125 innovations launched** on the market; **700+ EIT-labelled graduates** and **64 000+ participants in non-labelled learning**.

Two societal-impact areas were examined in depth. In terms of **engagement of citizens and patients** in shaping health innovations (*# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment*), the targets were exceeded substantially. By 2024, The EIT Health reported that **more than 60,000 citizens and patients were involved, exceeding the 25 600 target for 2024 and the 38 400 target for 2027**. As for structured processes created for the accelerated implementation and scaling up of innovations, using digital tools *(# upscaled projects that make healthcare more agile through structured (digitised) processes*), **45 upscaled projects** were reported for 2021–2024, meeting the 2024 milestone and setting a solid trajectory toward the 2027 target of 77.

EIT RawMaterials demonstrates clear progress against its mandate to secure raw-materials supply, design materials solutions, and close materials loops. Highlights include:

- **Support to over 750 start-ups and scale-ups** (attracting EUR 593 million in investment).
- **373 innovations introduced to the market**.
- **787 EIT-labelled graduates** and **100 000+ participants in non-labelled courses**.
- **36% women participation in EIT-labelled Master's programmes**.
- **Eight new advanced materials developed**; **62 new or improved products with reduced toxic content**; and **71 validated substitution cases for critical or toxic materials**, supporting higher recycling rates and the EU circular-economy goals.

Through its leadership of the European RawMaterials Alliance (ERMA), EIT RawMaterials is assessing over 100 investment projects, representing qualified investment opportunities worth more than EUR 25 billion, thereby fostering innovation and investment in the sector.

The **raw materials concentrate produced indicates that output rose by nearly 50%** between 2016 and 2023, which is well above the 2024 and 2027 targets of 2% and 5%, respectively. This confirms that the EIT RawMaterials' funding, technical support, and ecosystem facilitation have enabled projects to reach commercialisation and industrial application.

For **critical raw materials substitution/reduction (number of cases)**, 71 cases were recorded by 2024 (below the 2024 target of 80), but a substantial improvement from the 2017 baseline of 3. This trend aligns with EU strategic objectives under the Critical Raw Materials Act, which prioritise diversification and substitution for supply security. With the **production of advanced materials (resulting in a percentage increase), the 2024 targets**

were met (for example, gains in scandium and selected ferroalloys). However, percentage growth often reflects low baselines and niche volumes. At the EU level, there is limited evidence of systemic expansion in advanced-material production, with import dependency for critical inputs remaining high.

For **EIT Food**, the evidence indicates substantive progress against its consumer-centric and system-wide objectives. Headline results include:

- Support to **1 260** start-ups (raising **EUR 1,34 billion**).
- **286 innovations on the market, 1 130 new jobs created.**
- **12 799 EIT-labelled graduates, of which 161 are Master's graduates.**
- **Eight new skills and professions developed.**
- **63 120 consumers supported in making healthier choices alongside 43 products with improved nutritional profiles**.

On **increased public engagement in the food system** (*# people taking part in EIT Food co-creation activities*), both 2024 and 2027 targets have been exceeded, reflecting strong public mobilisation via Consumer Engagement Labs, targeted interventions and the TrustTracker. For **increased adoption & uptake of innovation in the food system** and **Improved food safety & security** *(# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency*), **56 solutions** were in use by 2024, surpassing the 2024 and 2027 targets (10 and 20, respectively). This demonstrates solid portfolio progress in line with the sector's digitalisation trend.

Regarding the **reduction in the relative risk of obesity & non-communicable disease (NCD) prevalence in target populations due to known dietary factors** (*# EIT Food-supported products on the market with reduced salt/free sugars/trans & saturated fats, or otherwise improved nutritional profile*), reported figures exceed targets, signalling portfolio-level progress.

Thirty supported products with demonstrably improved nutritional profiles were placed on the market, surpassing the minimum benchmark of three products set for the 2021–2024 period. These findings indicate not only the successful delivery of outputs beyond planned levels but also **portfolio-level progress towards healthier diets and reduced nutrition-related health risks** in line with EU public health and Farm to Fork objectives.

For **EIT Food-supported products on the market derived from alternative sources**, **40 supported products** by 2024 exceeded the 2024 goal (15) and already met the 2027 goal (40), consistent with EU/global momentum in alternative proteins and controlled-environment agriculture. On **reduction in food waste & food loss; Improvement in food system contribution to outcomes under EU Circular Economy Monitoring Framework** (*# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams*), results are ahead of 2024 targets (31 vs a 2024 target of 15).

For **improved efficiency and sustainability of food systems** (*# EUR Social, Environmental & Economic Return on Investment (ROI) per Euro invested – "Portfolio ROI*"), independently conducted assessments[18] indicate that targets are already exceeded. The estimated ROI on entrepreneurship amounts to **EUR 6 per EUR 1 invested over a 10-year period,** rising **to EUR 13 over 15 years. For innovation,** the estimated **ROI is EUR 1,6 per EUR 1 invested over 10 years and EUR 21,5 over 15 years**.

[18] EIT Food (2024) Entrepreneurship Impact Report: An overview of the return on investment for EIT Food's support of agrifood tech startups 2018–2023. Independent impact assessment conducted by Brookdale Consulting. Report, 15 August. Available at: EIT Food Reports webpage (accessed 5 December 2025); EIT Food (2025) Innovation Impact Report. Independent impact assessment of EIT Food's portfolio of co-funded innovation projects, with a focus on CO_2-eq mitigation and consumer health benefits. Report, 14 October. Available at: EIT Food Reports webpage (accessed 5 December 2025).

While progress is noted in all examined areas, the actual EU-wide impacts frequently depend on multiple factors, including market dynamics and regulatory frameworks.

EIT Manufacturing shows steady progress against its objectives to put people at the centre of manufacturing, accelerate green manufacturing, and foster sovereignty and competitiveness. Key achievements include:

- **154 innovations launched to market.**
- **1 015 supported ventures** attracting over **EUR 153 million in investment.**
- **1 706 graduates from EIT-labelled programmes** and over **55 000 participants in non-degree programmes.**
- The **share of women-led start-ups** in the KIC portfolio rose from a negligible level in 2020 to **over 25% by 2023. In 2024, women-led ventures received more than 40% of direct funding**.

The study investigated EIT Manufacturing's contribution to building a strong European talent pool equipped with transversal, flexible skills aligned with evolving job-market requirements. Aligned with EU priorities, such as the European Skills Agenda and the Pact for Skills, the KIC scaled its education and training offer to **over 100 programmes**.

The portfolio has **strengthened participants' digital and Industry 4.0 capabilities (including automation-enabled and data-enabled manufacturing), alongside innovation, green/circular and transversal competences**. This is consistent with the KIC's Competence Framework and with evidence from cross-KIC surveys, in which ventures most often reported gaps filled in entrepreneurial, sustainability, innovation/R&I and leadership skills.

EIT Manufacturing partners reported **particularly strong contributions to closing digital skills gaps**. Education and training activities offered by the KIC are essential because 18,4% of the EU manufacturing workforce remains low-educated, and participation in job-related training lags other sectors, indicating that sector-level effects remain somewhat limited.

Indicators covered EIT Manufacturing's contribution to increasing women's participation and leadership in the manufacturing sector. Although progress toward gender equality in manufacturing at the EU level is slow, EIT Manufacturing's portfolio-level results show a more dynamic trend. **Women's participation in EIT-supported upskilling and reskilling programmes reached 42%** (above the 30% benchmark), with high completion rates, suggesting that the KIC is creating effective entry points for women to acquire manufacturing-relevant competences.

These activities strengthen women's **digital and Industry 4.0 capabilities**, alongside **innovation, leadership and commercialisation skills**, in line with the KIC's structured approach to skills development through its Competence Framework.

Regarding industrial growth and jobs, manufacturing remains a cornerstone of the EU economy, with a turnover of EUR 9,8 trillion in 2022 and nearly 32 million employees. Although recent macroeconomic shocks (incl. geopolitical tensions) have constrained revenue growth, EIT Manufacturing-supported ventures created an estimated **2 272 new jobs** between 2020 and 2024 (versus a 2 779 target for 2024).

This job creation should be read against broader market dynamics.[19] **Non-supported young enterprises in the EU typically expand headcount strongly in their early years**, with employment rising substantially over the first 3–5 years among surviving firms. That indicates EIT Manufacturing's contribution is best interpreted as

[19] Eurostat business demography data on enterprises born 2017–2022.

accelerating and de-risking scale-up trajectories for a subset of high-potential ventures rather than driving sector-wide employment shifts. The revenue evidence is thinner: survey data indicate only **20% of partners reported revenue contributions from EIT-supported innovations**, which typically account for less than 10% of growth.

The study investigated where European manufacturing companies extensively utilise industrial data and digital business platforms to manage their supply chains and customers within digital ecosystems (KPI for 2021–2024). By 2024, **75 companies supported by EIT Manufacturing were recognised as having increased their digital maturity**, slightly below the target of 80. EIT Manufacturing's results align with EU-level digitalisation, although the reach is limited to participating companies.

The **EIT Urban Mobility** portfolio demonstrates a steady progression toward its intended impact goals: strengthening multimodal transport systems, expanding clean city logistics, protecting health and well-being, supporting green and inclusive urban design, and enabling Europe's urban mobility sector to lead the global transition. Key achievements include:

- **175 innovations launched.**
- **1 117 supported ventures** (attracting over **EUR 168 million**).
- **631 graduates** from EIT-labelled programmes and over **36 000 professionals trained**.
- Contribution to an estimated **10 027 tons of greenhouse gas emissions reduced**.
- A **partnership network expanding from 85 (2019) to 523 (2024)**, including more than 50 cities.

By 2024, **150 new courses** had been introduced to develop new skills for the mobility sector, meeting the 2027 target three years ahead of schedule. By 2024, 65 solutions *(#innovation pilot scalings*) had been implemented and scaled, resulting in reduced CO_2 emissions and liveable urban areas. This exceeded the target of 39, indicating **strong uptake across cities and industry partners**.

With the aim of increasing the share of public-private investments and incentives for sustainable urban mobility measures and services, EIT Urban Mobility mobilised **EUR 29 million** (vs. a EUR 30 million target), indicating meaningful capital mobilisation in a challenging investment climate. That said, while aligned with EU priorities, the absolute scale remains modest relative to needs, estimated at EUR 1,5 trillion by 2050, including EUR 500 billion for sustainable mobility measures alone.

By 2024, 244 instances of **increased citizen involvement** and active participation in decision-making and the co-creation of urban mobility solutions *(# demonstrations/pilots/ living labs)* were reported within projects that actively involve citizens and/or local associations, exceeding the 2024 milestone. While this signals a strong commitment to participatory innovation, EU-level practice remains underdeveloped: recent evidence suggests that fewer than 15% of EU-funded mobility projects reach true co-creation or co-decision-making. Against that backdrop, EIT Urban Mobility's results are moving in the right direction and appear above the EU average for structured, active citizen involvement.

In conclusion, the study finds that the EIT and its eight KICs have made a substantial and measurable contribution to strengthening Europe's innovation capacity and delivering economic and societal value through the unique Knowledge Triangle model. There are particularly clear results in venture creation and support, innovation brought to market, and the scaling of education and training aligned with EU priorities.

While younger KICs are still consolidating their portfolios, their trajectories suggest growing systemic influence and strong potential to further strengthen Europe's green, digital and health transitions over the remainder of the 2021–2027 period.

At the same time, the evidence base remains uneven across indicators and KICs, and many societal outcomes are shaped by external market and policy conditions. That means quantified results should often be interpreted as an indicative contribution rather than full attribution.

The study therefore highlights the need for continued refinement of the EIT Impact Framework, stronger harmonisation of data collection across KIC systems (including more consistent venture tracking), and more robust longitudinal measurement of outcomes for people, ventures, and innovations.

1 Introduction

1.1 Study Objectives and Scope

1.1.1 Overall and specific objectives of the study

The primary objective of the Impact Study is to evaluate the economic and societal effects of the activities undertaken by the eight KICs since their inception. The EIT Impact Framework, adopted in 2022 and aligned with the EIT Strategic Innovation Agenda 2021–2027 (SIA), serves as a key reference document of the study. This assessment is based on key performance indicators (KPIs) defined in the Impact Framework.

The study aims to deliver a clear and comprehensive analysis, focusing on the performance of EIT's Knowledge and Innovation Communities (KICs) against these KPIs, while placing the results in the context of the EIT's added value within the European innovation ecosystem and attributing observed impacts to EIT-supported initiatives.

More specifically, the study aims to:

- **Assess the impact of KIC activities** using the aforementioned KPIs from the EIT Impact Framework, with a focus on Economic Impact performance indicators and a selected sample of Societal Impact indicators.
- **Address the issue of impact attribution**, in order to distinguish the effects of KIC activities from other contributing factors, to the extent that is methodologically sound and feasible.
- **Analyse the EIT's added value within the European innovation ecosystem**, ensuring that these high-level impacts offer a more holistic perspective beyond the specific KPIs outlined in the Impact Framework.

1.1.2 Scope and selection of indicators

The study covers all KIC activities from their establishment up to 2024, based on available data (see Annex 1: Study framework). It focuses on the first eight KICs: EIT Climate-KIC,[20] EIT Digital,[21] EIT InnoEnergy,[22] EIT RawMaterials, EIT Health, EIT Food, EIT Manufacturing, and EIT Urban Mobility. The ninth KIC established in 2022 (EIT Culture and Creativity) is explicitly excluded from the scope (see section on the EIT structure for details).

Previously, the EIT operated under Decision No 1312/2013/EU of the European Parliament and of the Council of 11 December 2013 on the Strategic Innovation Agenda (SIA),[23] which established a different set of reporting and monitoring criteria. As a result, there are differences in what is monitored and how, between the conclusion of the previous Strategic Agenda and the adoption of the new one in 2021 (see section Introduction to the EIT below). Consequently, for some KPIs, no historical data is available prior to 2021, as there was no requirement to track them under the earlier framework.

The current Impact Framework, based on the 2021-2027 SIA, includes more than 90 KPIs, of which about 60 are KIC-specific. The study is structured around this framework and follows a selection of the indicators it defines.

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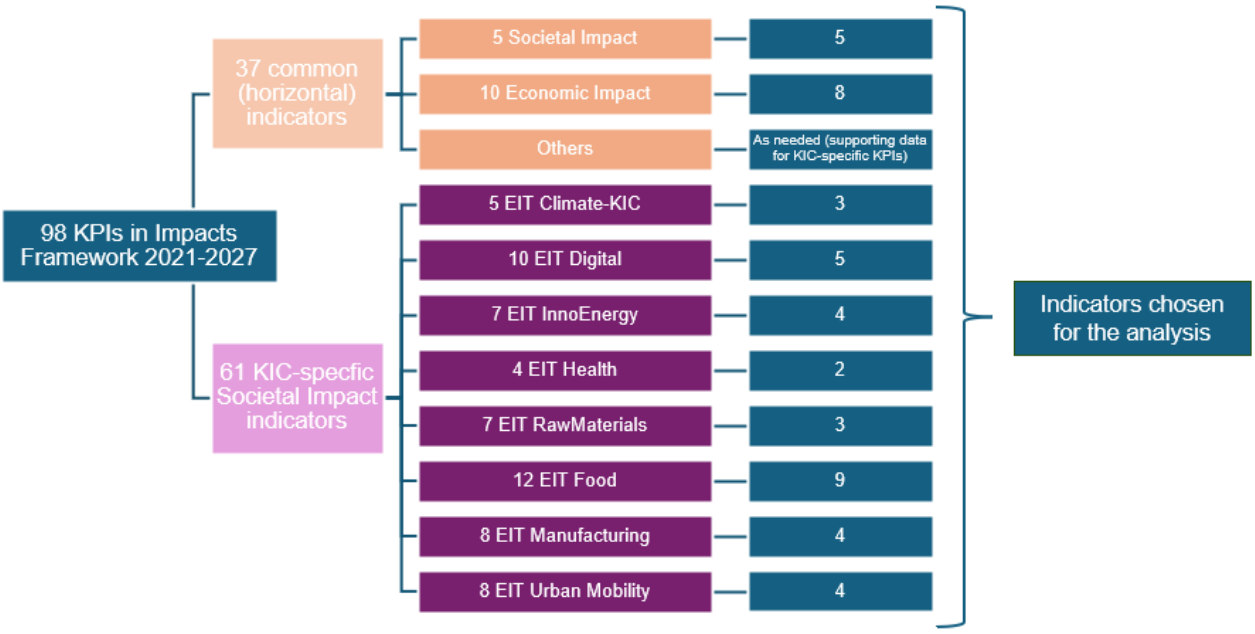
[20] As of February 2025, EIT Climate-KIC was renamed to Climate KIC. Source: https://www.climate-kic.org/press-releases/eit-climate-kic-becomes-climate-kic/.
[21] As of October 2025, EIT Digital was renamed to 28Digital. Source: https://www.eit.europa.eu/news-events/news/eit-digital-becomes-28digital-new-chapter-europes-digital-innovation.
[22] Currently renamed to "InnoEnergy". Source: https://www.eit.europa.eu/our-communities/eit-innoenergy.
[23] European Parliament & Council of the European Union (2013). Decision No 1312/2013/EU of 11 December 2013 on the Strategic Innovation Agenda of the European Institute of Innovation and Technology (EIT): The contribution of the EIT to a more innovative Europe. Official Journal of the European Union, L 347, 892–923. https://eur-lex.europa.eu/eli/dec/2013/1312/oj/eng.

Based on the methodology and criteria established to sample the indicators, as described in Annex 1: Study framework, the decision was made and approved by the EIT to include 5 horizontal Societal Impact KPIs, 8 horizontal Economic Impact KPIs, and 34 KIC-specific Societal Impact KPIs. This selection is presented in Figure 1 below.

Figure 1. Selection of KPIs for the Impact Study



Source: Ecorys

In principle, the study follows the KPI definitions as outlined in the Impact Framework. However, due to variations in the definitions of KIC-specific societal KPIs across different KICs, particularly in terms of scope, level of detail, and thematic focus, the study adopts the interpretations provided by the KICs themselves, as shared during workshops and meetings (see Annex 1). Consequently, the scope of the analysis and the selection of data sources are guided primarily by the definitions set out in the Impact Framework, with additional input from KIC representatives. The study is restricted to impacts defined in the Impact Framework.

1.1.2.1 Timeframe

The study covers the activities of the EIT KICs from their establishment up to the **end of 2024.**[24] However, due to changes introduced in the EIT SIA and the subsequent revision of the Impact Framework (as discussed above), as well as the limitations of utilised databases (see Annex 1), it was not possible to collect fully comparable historical data for all indicators. This applies to both the common indicators used across all KICs and the KIC-specific indicators.

As a result, the timeframe for the data used in the analysis extends **as far back as feasible**, depending on the availability and reliability of sources. Given the diverse nature of these sources, ranging from external datasets to internally generated EIT and KIC reports and monitoring data, a uniform baseline could not be applied consistently across all indicators. Instead, the study adopts a **pragmatic approach**, drawing on the most complete evidence available for each case.

[24] Dealroom data cut-off date is April 16, 2025.

1.1.2.2 Geographic scope

The scope of the EIT operations (as defined in its SIA) and indicators defined in the EIT Impact Framework determine the study's geographical scope, with a primary distinction made between Regional Innovation Scheme (**RIS)**[25] and **non-RIS countries**.

The EIT RIS covers EU Member States and regions classified as either moderate or modest innovators according to the European Innovation Scoreboard. These include:

- EU Member States: Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Italy, Latvia, Lithuania, Malta, Poland, Portugal, Romania, Slovakia, Slovenia, and Spain.
- Outermost Regions: Guadeloupe, French Guiana, Réunion, Martinique, Mayotte, and Saint-Martin (France); the Azores and Madeira (Portugal); and the Canary Islands (Spain).
- Horizon Europe Associated Countries: Montenegro, North Macedonia, Serbia, Turkey, Ukraine, Albania, Bosnia and Herzegovina, and Israel.[26]

Non-RIS countries are those not covered by the Scheme. This includes EU Member States with higher levels of innovation, as well as partners from outside the EU, such as the United States.

Where available, the analysis provides a comparative perspective between RIS and non-RIS countries, with attention given to differences in participation, capacities, and impacts. Given that several KIC activities extend beyond Europe, the study's geographical scope is, in principle, **global**, while maintaining a **primary focus on the European innovation landscape**.

1.1.2.3 Thematic scope – types of impacts

The thematic scope of the Impact Study is defined by the EIT Impact Framework and structured around three core categories that reflect the breadth, depth and diversity of EIT-supported activities and their contribution to innovation, economic development, and societal progress.

- The first category focuses on direct **operational outputs** of the EIT and its KICs. This includes measurable results such as the number of start-ups and scale-ups supported, the participation and graduation rates of students in EIT-labelled educational programmes, and the number of innovations introduced to the market as a direct result of KIC support.
- The second category encompasses indicators related to the **economic impact** of these operations. These indicators assess how EIT-supported activities contribute to economic growth, including revenue generation, job creation, and investment attraction.
- The third and broadest category addresses **societal impacts**. This dimension reflects the diverse thematic areas covered by the KICs (ranging from health and food to sustainable energy) and the wide variety of societal impact indicators. These include, among others, improvements in gender equality, enhanced climate resilience in cities and regions, and the development of new skills and upskilling opportunities across sectors.

[25] RIS was launched in 2014 to widen the EIT's regional outreach to modest and moderate innovator countries. Since 2021, RIS activities have become mandatory and an integral part of the KICs' multiannual strategies. At least 10% of the EIT's budget, and a maximum of 15% of the overall EIT funding for existing and new KICs, is dedicated to RIS activities, aiming to increase the number of KIC partners from these targeted regions; EIT Strategic Innovation Agenda 2021-2027.
[26] EIT Regional Innovation Scheme. https://eit-ris.eu/about-eit-community/.

The thematic scope of the Impact Study, therefore, spans the **spectrum from immediate operational outputs to long-term systemic impacts**. At one end, the focus is on the tangible and quantifiable results directly generated by EIT and its KICs, while at the other, the analysis extends to more diffuse societal changes, where attribution is more complex.

Hence, the analysis looks not only at the **individual categories in isolation**, but also at **their interlinkages**, that is, how direct outputs, such as the creation of start-ups, can potentially translate into broader benefits, and how these, in turn, contribute to wider societal goals, as it's the case for several KIC-specific Societal Impact indicators.

1.2 Main methodological considerations

The methodology applied in this Impact Study reflects the diverse nature of the EIT and its KICs. Several considerations guide the approach.

As discussed in the following section, KICs work across a wide range of domains, from energy and digital technologies to health and urban mobility. Furthermore, indicators in the EIT Impact Framework differ in scope, nature, and measurability. Each KIC's indicators are tied to its distinct mission and operating environment, making it necessary to apply differentiated measurement methods rather than a uniform approach. Although core short-term KPIs are reported consistently across KICs, impact-related datasets differ in coverage and quality. This creates a complex landscape that requires careful integration of diverse data types, and no single metric or dataset can capture their collective and individual impacts. Given the heterogeneity of impacts, the study employs a flexible combination of quantitative and qualitative techniques and relies on multiple analytical perspectives and datasets, as appropriate and available.

The study's methodology was designed to address potential data gaps in the available data, ensuring a comprehensive and accurate assessment of the impact. A mixed-methods approach was central to the study. This combination of quantitative methods, such as desk research, surveys, KPIs, and econometric analysis, with qualitative methods, including interviews with key stakeholders and case studies, enables an effective reflection of the diversity of impacts and data sources.

A key part of the study involves analysing economic and societal impact attribution, to provide insights into the nature and level of importance of an intervention's contribution. The analysis enables a deeper understanding of how, why, and for whom the observed results and impacts have occurred, as well as the roles played by specific interventions. It is a structured process of critical analysis that considers other explanations of the change process, including contextual factors.

The EIT economic impact attribution applies a multi-layered benchmarking methodology designed to capture the relative performance of EIT-supported ventures within the broader European innovation landscape, applying various approaches as listed below. For societal impact analysis, each societal impact indicator was analysed using the following scheme: attribution logic (detailed description of the contribution made by EIT), attribution type (attribution vs contribution), evidence robustness (moderate vs high), and caveats (potential shortcomings). The detailed methodology for the study, that is, the main methods and data sources used, is discussed in Annex 1.

Despite efforts to ensure data triangulation and robust findings, certain limitations pertain to data availability and other complexities that affect the results. Therefore, the study's results must be treated with reasonable caution and not interpreted outside the economic and societal context in which EIT and supported KIC operate.

Key considerations/limitations are presented below and further elaborated in Annexes 1 and 2.

- KICs have been established in successive waves, spanning over a decade. This **variation in maturity** significantly influences the scale, visibility, and measurability of their impacts. First-wave KICs have had more time to consolidate their activities, expand their networks, and demonstrate systemic change,

whereas younger KICs are still building their ecosystems and developing their impact pathways, which require a nuanced approach tailored to their stage of development.

- While the EIT provides strategic direction, general objectives, and funding, KICs retain **substantial flexibility** in designing activities, forming partnerships, and setting their operational priorities. This autonomy allows KICs to adapt to the specific needs of their sectors and regions, but also results in diverse pathways to impact. As a consequence, no single model or trajectory applies across all KICs. The report reflects this diversity by examining each KIC's distinct approach and contribution.

- The sectors in which KICs operate differ widely in their receptiveness to innovation and in the time required for new solutions to reach and remain on the market. Some sectors, such as digital technologies, offer more rapid uptake and scalability, while others, such as health, involve longer regulatory or investment cycles. Similarly, the scale of participation in KIC activities varies, whether in terms of start-up creation, business acceleration, or engagement in education and training pathways, due to **sectoral dynamics**, which should be considered when comparing results across KICs and when assessing the magnitude of their impacts.

The **Economic Impact** analysis faces its own limitations due to data availability and ongoing parallel studies. However, the main consideration is that KIC achievements must be viewed in context, with observed effects reflecting each KIC's lifecycle stage and the composition of its portfolio across multiple, related domains within the societal challenge it aims to address. Earlier-established KICs tend to show greater impact due to longer operations and broader portfolios, while more recently established KICs may display narrower but deeper effects aligned with their maturing activities.

- As the primary source of information about the revenue and employment growth of ventures supported by KICs, the Dealroom platform[27] data offers uneven coverage across indicators and KICs, limiting comprehensive time-series analysis, especially for revenue data.

- Two ongoing evaluations, one the 7-year assessment of EIT Manufacturing and EIT Urban Mobility, and another conducted by DG EAC and JRC[28], cover similar economic indicators and include career tracking of EIT-Label graduates, adding depth to employment and entrepreneurship insights. However, those analyses are not yet available.

Furthermore, assessing the **Societal Impacts** of the EIT and its KICs in particular presents inherent methodological challenges.

- First and foremost, the timeframe within which many initiatives have been implemented is too short to allow for the observation of robust, long-term effects. Innovation-driven transformations, particularly in complex systems such as healthcare or energy, often require decades to produce measurable, lasting changes. Consequently, many of the results observed to date represent intermediate outputs or outcomes rather than demonstrable impacts at the societal level.

- A second limitation stems from the breadth and scale of the societal challenges addressed. Issues such as climate change or digital transformation are global in nature, with multifactorial drivers and long-standing systemic barriers. Against this backdrop, even impactful KIC interventions can appear relatively modest when assessed in isolation. Their contributions are often incremental and form part of broader policy and innovation landscapes where attribution is inherently difficult. Measuring of impacts in the field of education

[27] Dealroom is a database of start-ups and scale-ups; the EIT Dealroom portal aggregates ventures supported by the EIT Community. Data are compiled via manual research, automated collection from public sources, and user contributions. See: https://eit.dealroom.co/intro.
[28] The data was collected in mid-2025 through an online survey among graduates involved in EIT-labelled education and training supported by KICs.

further illustrates these difficulties. While participation in EIT-labelled programmes and other educational initiatives can be captured with quantitative indicators, the real transformative effects, such as changes in employability, skills gained, entrepreneurial mindset, or long-term contributions to innovation ecosystems, are far more challenging to quantify. These outcomes unfold over extended periods and are shaped by multiple external factors, making attribution to KIC interventions a complex process.

- Thirdly, as mentioned at the beginning of this section, the diversity of methodologies applied by KICs, differences in data availability, and the reliance on self-reported information add layers of complexity to the assessment. The introduction of the new Impact Framework in 2022 has improved the coverage and detail of reporting, yet it has also limited the historical comparability of data, thereby constraining the ability to identify long-term trends.
- Lastly, impact attribution is constrained by several factors: results are influenced by external conditions, many indicators measure immediate outputs that do not directly translate into long-term impacts, and limited data granularity and triangulation hinder precise attribution.

The study provides evidence of progress across multiple domains; however, it must be acknowledged that measuring Societal Impact remains an inherently complex task. The results presented should therefore be interpreted as **indicative contributions within broader systems of change, rather than as isolated or definitive measures of societal transformation**.

1.3 Introduction to the EIT

The European Institute of Innovation and Technology (EIT) was established to boost Europe's innovation capacity and to contribute to sustainable economic growth and employment. The EIT operates through a multidisciplinary network of organisations from the business, education, and research sectors across the European Union and beyond. This network provides opportunities for students, innovators, and entrepreneurs. In cooperation with its partners, the EIT Community implements a range of activities in education, innovation, and entrepreneurship designed to support the development of skills, foster innovation, and facilitate the commercialisation of ideas.[29]

The EIT was established by the European Union in 2008 under **Regulation (EC) No 294/2008** of the European Parliament and the Council,[30] with the aim of strengthening innovation and entrepreneurship across Europe. The regulatory framework governing its operations was updated in 2021 with the adoption of **Regulation (EU) 2021/695**,[31] which further aligns the EIT's mission with the priorities of the European Union and the objectives of Horizon Europe.

The EIT is mandated to advance innovation by integrating business, research, and education through its network of **Knowledge and Innovation Communities (KICs)**. These KICs address specific societal challenges while promoting entrepreneurial talent, business creation, and the development of innovation-related skills. The Horizon Europe Regulation (EU) 2021/695[32] further strengthens the role of the EIT and its KICs by formally recognising them as Institutionalised European Partnerships.

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[29] EIT (2024). Making innovation happen: EIT Innovation Model. Publications Office of the European Union. https://www.eit.europa.eu/sites/default/files/2024-12/EIT%20Innovation%20Model%20Paper%202024.pdf,
[30] European Parliament & Council of the European Union. (2008). Regulation (EC) No 294/2008 of 11 March 2008 establishing the European Institute of Innovation and Technology. Official Journal of the European Union, L 97, 1–12. https://eur-lex.europa.eu/eli/reg/2008/294/oj/eng,
[31] European Parliament & Council of the European Union. (2021). Regulation (EU) 2021/819 of 20 May 2021 on the European Institute of Innovation and Technology (recast). Official Journal of the European Union, L 189, 61–90. https://eur-lex.europa.eu/eli/reg/2021/819/oj/eng,
[32] European Parliament & Council of the European Union. (2021). Regulation (EU) 2021/695 of 28 April 2021 establishing Horizon Europe – the Framework Programme for Research and Innovation, laying down its rules for participation and dissemination, and repealing Regulations (EU) No 1290/2013 and (EU) No 1291/2013. Official Journal of the European Union, L 170, 1–68. https://eur-lex.europa.eu/eli/reg/2021/695/oj/eng.

The new Regulation represents the overall consolidation and modernisation of the EIT operation.

While the 2008 Regulation established the EIT for the first time within the policy context of the Lisbon Agenda and Horizon 2020, focusing on enhancing Europe's innovation capacity through the integration of higher education, research, and business, the 2021 Regulation aligns the EIT with Horizon Europe (2021–2027) and broader EU strategic priorities, including the European Green Deal, the Sustainable Development Goals (SDGs), and the Paris Agreement (see section on EIT objectives below). The purpose of the recast was not to create a new structure but to modernise and strengthen the existing framework. It introduced measures to improve governance, transparency, openness, and integration with other EU programmes, empowering the EIT to operate more coherently within the overall European innovation landscape.

The nature of KICs (see section on EIT's structure below) also evolved. Initially conceived as strategic partnerships among universities, research organisations, and companies, KICs are now defined as Institutionalised European Partnerships under Horizon Europe. Their operation has become more structured, with multiannual grant and partnership agreements that now include more standardised performance indicators and stronger monitoring mechanisms.

The **Strategic Innovation Agenda** serves as the key guiding document for the EIT's operations. The current SIA for 2021–2027,[33] aligned with Horizon Europe, defines the EIT's priority areas and strategic direction. It sets out the objectives, key actions, operational approach, expected outcomes, and anticipated impact, as well as provides an estimate of the resources required for the duration of the Horizon Europe programme. Given its significance for EU innovation policy and its expected socio-economic impact, the SIA is adopted by the European Parliament and the Council on the basis of a proposal from the European Commission.

1.3.1 The EIT KICs

A distinctive feature of the EIT since its inception has been its pioneering particular approach to integrating higher education, research, and innovation – the Knowledge Triangle, with a strong emphasis on entrepreneurial talent, business creation, and innovation skills. This approach was particularly praised in the 2024 Evaluation Study of the European Framework Programmes for Research and Innovation for Innovative Europe.[34]

Implementing the Knowledge Triangle is undertaken through a set of **KICs**, which "*are Europe-wide networks centred around addressing a specific societal challen*ge" that bring together businesses, investors, higher education institutions (for both teaching and research), research centres, and public and non-profit stakeholders.[35]

The KICs have been established in waves – **the first wave of KICs** started operation in 2010:

- EIT Climate-KIC focuses on "*the transformation of 400+ cities, regions and countries in Europe and beyond into climate-resilient, carbon-neutral and ecologically sustainable places".*[36]
- EIT Digital builds "*the next generation of digital ventures, digital products and services, and breeds digital entrepreneurial talent".*[37]

[33] Decision (EU) 2021/820 of the European Parliament and of the Council of 20 May 2021 on the strategic innovation agenda of the European Institute of Innovation and Technology (EIT) 2021-2027: boosting the innovation talent and capacity of Europe and repealing decision no 1312/2013/EU. 2021. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021D0820.
[34] European Commission, Directorate-General for Research and Innovation (2024) *Evaluation study of the European framework programmes for research and innovation for an innovative Europe – Report phase 2 (support study for the interim evaluation of Horizon Europe).* Publications Office of the European Union, Luxembourg. doi: 10.2777/499132.
[35] EIT. About Our Knowledge and Innovation Communities. https://www.eit.europa.eu/global-challenges/about-our-communities.
[36] Climate KIC. Europe 2030 missions. https://www.climate-kic.org/programmes/europe-2030-missions/.
[37] 28DGTL. A competitive digital Europe that is inclusive, fair and sustainable. https://www.eitdigital.eu/our-community/purpose/.

- EIT InnoEnergy has an overall aim of "*industrialising clean tech the InnoEnergy way".*[38]

Second wave KICs were established in 2014:

- EIT Health focuses on "*healthcare innovation across Europe. We debate the topics that matter, develop products and services to improve health outcomes".*[39]
- EIT RawMaterials has "*three strategic objectives: 1) securing raw materials supply; 2) designing materials solutions; and 3) closing materials loops".*[40]

There was one **third-wave KIC** established in 2016:

- EIT Food "*accelerates innovation to build a future-fit food system that produces healthy and sustainable food for all.*[41]

Fourth wave KICs were established in 2019:

- EIT Manufacturing, to strengthen and increase Europe's industrial competitiveness.
- EIT Urban Mobility, supporting smart, green and integrated transport.

One KIC was established in 2022:

- EIT Culture and Creativity, "*helping European cultural and creative sectors and industries to become more sustainable, resilient, and competitive".*[42]

A call for proposals for EIT Water[43], aimed at "*strengthening Europe's water, marine and maritime sectors and ecosystems*", was published in January 2025, and the KIC has recently been designated.

The analysis carried out by this project covers the first eight KICs.

KICs operate through several ecosystem elements:

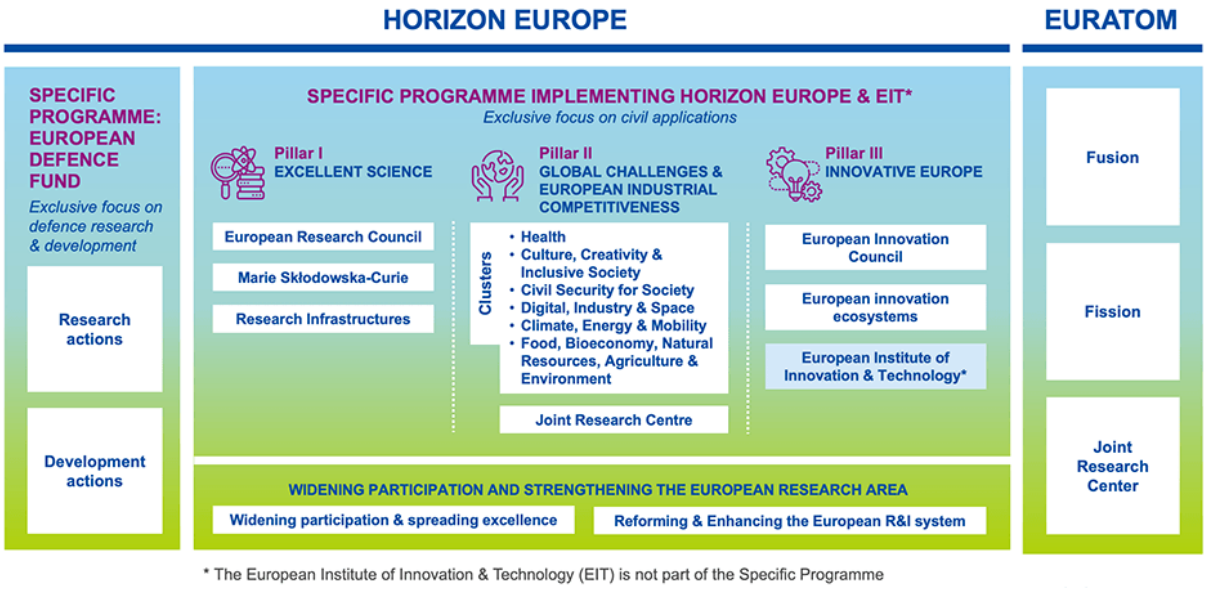
- Central offices are the main offices of KICs, located across Europe
- Co-Location Centres (CLCs) are regional hubs established to serve as local operational nodes, or offices, where partners from education, research, and business collaborate.
- EIT Community Hubs/EIT RIS Hubs serve as a one-stop shop for local stakeholders in the countries in which they are established, with the main mission to support access to KICs and identify synergies between the EIT Community and local actors.

1.3.2 The EIT objectives and Horizon Europe integration

The EIT is situated within Pillar III (Innovative Europe) of the Horizon Europe Programme (Figure 2).

[38] InnoEnergy. #1 most active energy investor globally 2024*. https://innoenergy.com/about-us/.
[39] EIT Health. What we do. https://eithealth.eu/what-we-do/.
[40] EIT RawMaterials. EIT RAWMATERIALS STRATEGIC AGENDA 2021-2027. 2024-03-01_EITRM SA 21-27_for publication
[41] EIT Food. https://www.eitfood.eu/.
[42] EIT Culture & Creativity. About us. https://eit-culture-creativity.eu/about-us/.
[43] EIT. Call for EIT Water: Transforming Europe's Water, Marine, and Maritime Sectors and Ecosystems. https://www.eit.europa.eu/news-events/news/call-eit-water-transforming-europes-water-marine-and-maritime-sectors-and .

Figure 2. Horizon Europe structure



Source: European Commission[44]

Through its activities, the EIT is mandated to contribute to achieving four key strategic orientations of the Horizon Europe Strategic Plan[45]:

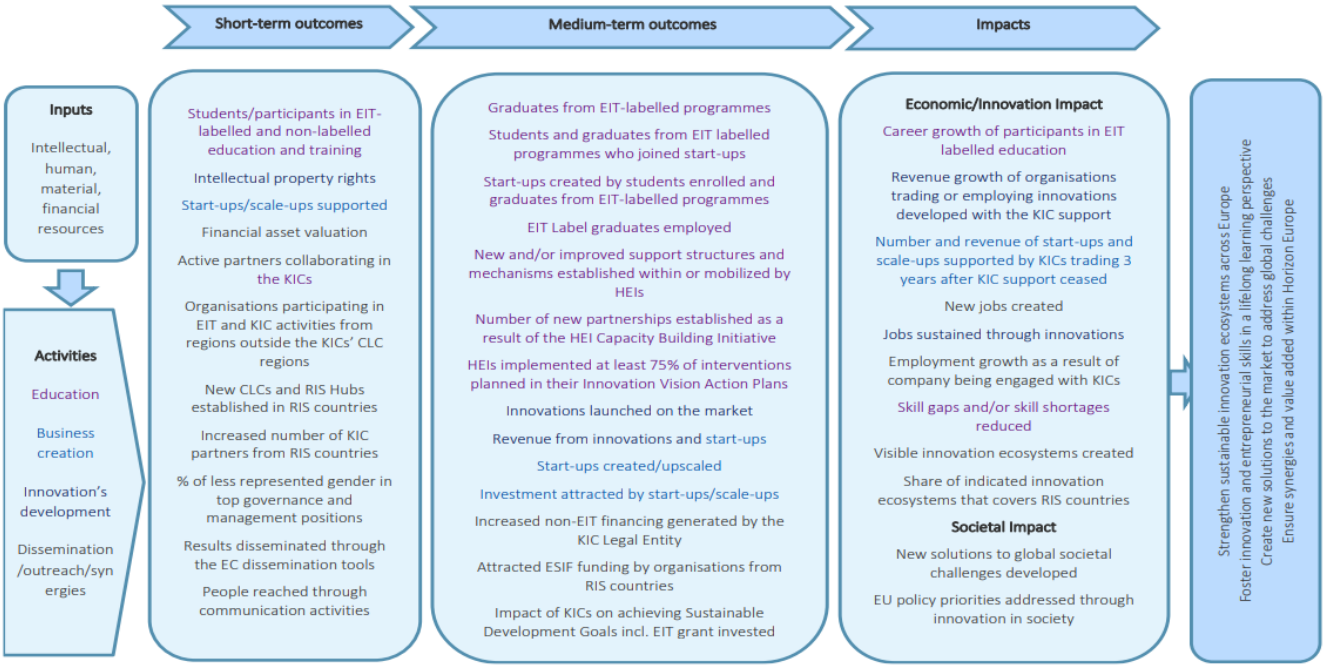
- Strengthen sustainable innovation ecosystems across Europe.
- Foster entrepreneurial and innovation skills in a lifelong learning perspective, including increasing capacities of Higher Education Institutions (HEIs) across Europe.
- Create new solutions to the market to address global challenges.
- Ensure synergies and added value within Horizon Europe.

And to help achieve the Horizon Europe objectives, the EIT has its specific objectives for 2021-2027 with its SIA that relate to: widening the visibility and impact of the in integrating the Knowledge Triangle; help HEIs across Europe to change their institutional structures to enable stronger integration of their activities into innovation ecosystems; ensure that there is maximum outreach of the EIT and KICs in building innovation capacity across localities and regions; and, facilitate an improved gender balance in those thematic areas that underpin innovation and research.

The EIT has an explicit impact pathway/framework[46] that details how it contributes to these four objectives (Figure 3).[47]

[44] Research and innovation, European Commission. THE EU RESEARCH & INNOVATION PROGRAMME 2021 – 27. https://research-and-innovation.ec.europa.eu/document/download/9224c3b4-f529-4b48-b21b-879c442002a2_en?filename=ec_rtd_he-investing-to-shape-our-future.pdf
[45] European Union. (2021). Decision (EU) 2021/820 on the Strategic Innovation Agenda of the EIT 2021–2027. https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32021D0820.
[46] https://www.eit.europa.eu/library/eit-simplified-impact-framework .
[47] European Commission, Directorate-General for Research and Innovation. (2024). Annexes for the evaluation study of the European framework programmes for research and innovation for innovative Europe: Phase 2. Publications Office of the European Union. https://data.europa.eu/doi/10.2777/726675, p. 536.

Figure 3. EIT Impact pathway



Source: European Commission[48]

Each KIC addresses a distinct societal challenge and therefore applies a tailored impact pathway and set of indicators within a common EIT framework. Therefore, the substantive contribution to the EIT and Horizon Europe objectives comes through the community of KICs, which form a collaborative network in which KICs focus on societal challenges and also collaborate on transversal issues and topics. Furthermore, KICs combine physical structures, such as CLCs[49] (bringing together a full range of stakeholders in a city or region), with virtual collaboration and networking, thereby creating a highly extensive innovation ecosystem across Europe.[50]

1.3.2.1 Contribution of selected indicators to Horizon Europe impact pathways

The EIT Impact Framework outlines how EIT activities contribute to four key Horizon Europe impact pathways and to two main types of impact: societal and economic. Figures 4 and 5 below showcase the selected indicators, from the current EIT Impact Framework, for this report (see Annex 1 for details about the selection of the indicators), to which Horizon Europe impact pathway they contribute, and subsequently to which type of impact. Chapter 2 covers the economic impact analysis, and Chapters 3 and 4 focus on the societal impact analysis.

[48] Ibid.
[49] EIT. About Our Knowledge and Innovation Communities. https://www.eit.europa.eu/global-challenges/about-our-communities .
[50] EIT. EIT - an Innovation Ecosystem like no other. https://www.eit.europa.eu/news-events/news/eit-innovation-ecosystem-no-other .

Figure 4. Selected EIT indicators relating to Horizon Europe Impact

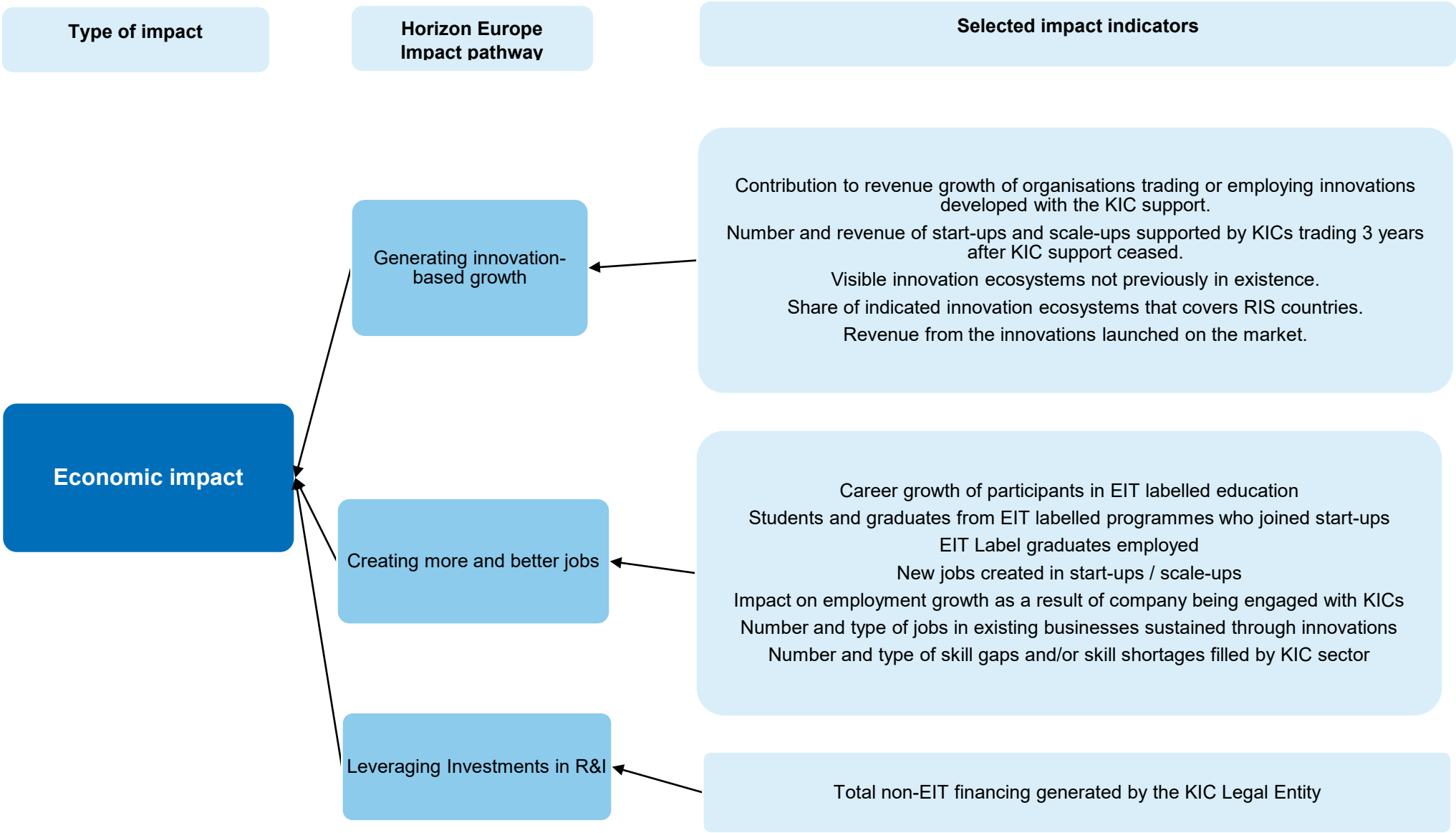


Figure 5. Link of selected impact indicators from the Horizon Europe Impact pathway

Impact type	HE Impact pathway	Selected Impact Indicators
Societal impact	Addressing EU priorities and global challenges through research and innovation	**Societal impact (overall):**1. EIT grant invested in climate action, biodiversity, clean air, digital transformation, health, sustainable development 2. Impact of KICs on achieving Sustainable Development Goals
		EIT Climate-KIC: Cities, regions, countries, and large-scale businesses succeeded in an ambition to tackle climate change at the speed and scale needed - Climate-friendly jobs created or sustained - Funding leveraged to support scale-up / diffusion of innovations to tackle climate change
		EIT Digital: Increased competitiveness of EU Member States with a special focus on countries with a DESI (Digital Economy and Society) <50 - Increased digital talent development in Europe - Increased digital upskilling of European professionals - Increased gender equality in digital education in Europe - Increased influence of EIT Digital on Digital Innovation Hubs
		EIT InnoEnergy: Ensuring the workforce in the InnoEnergy field - Gender balance promoted in the InnoEnergy field - Increased access to the innovative energy - Resources leveraged for InnoEnergy sector's growth
		EIT Health: Citizens and patients involved in seeking solutions for multi-morbid chronic conditions - structured processses created for the accelerated implementation and scaling up of innovations, using digital tools
		EIT Raw Materials: Raw materials concentrate produced - Critical raw materials substitution/reduction - Advanced materials produced
		EIT Food: Increased public engagement in the food system - Increased adoption & uptake of innovation in the food system - Reduction in relative risk (R) of obesity & Non-Communicable Disease (NCD) prevalence in target populations due to known dietary factors - Improved food safety & security - Products on the market derived from alternative sources - Reduction in food waste & food loss - Alumni retained in the food system - Improvement in food system contribution to outcomes under EU Circular Economy Monitoring Framework - Improved efficiency and sustainability of food systems
		EIT Manufacturing: A strong European talent pool with skill levels that make our industry competitive on a global scale. Transversal and flexible skills in line with changing job market requirements - Strong female impact on the European manufacturing innovation and start-up arena - European industry is the global innovation hotspot for manufacturing technology and solutions and a core engine of societal growth - European manufacturing companies make extensive use of industrial data and digital business platforms and manage their supply chains and customers in digital eco-systems
		EIT Urban Mobility: New competencies created that match future needs for the mobility sector and respond to city challenges - Reduced CO2 emissions and liveable urban areas created through implementation and scaling of solutios - Increased citizen involvement and level of active participation in decision making and co-creation of urban mobility solutions.

2 Economic Impact Analysis

This chapter presents a strategic assessment of the economic impact generated by the first eight KICs: EIT Climate, EIT Digital, EIT InnoEnergy, EIT Health, EIT RawMaterials, EIT Food, EIT Manufacturing and EIT Urban Mobility.

To estimate economic impact, KIC achievements up to the end of 2024 were considered. Where available, 2025 data were used as well. The KICs' years of establishment and the funding provided by the EIT are presented in Table 1.

Table 1. KICs which fall in the scope of the evaluation of Economic Impact

KIC	Partnership Agreement years	EIT Grant received from launch until end of 2025 in EUR (planned figures for 2023-25)
EIT Climate-KIC	2010-2024	650 459 396
EIT Digital	2010-2024	584 068 612
EIT InnoEnergy	2010-2024	674 042 991
EIT Health	2015-2029	578 722 399
EIT RawMaterials	2015-2029	542 412 376
EIT Food	2017-2031	493 144 045
EIT Manufacturing	2019-2033[51]	224 475 079
EIT Urban Mobility	2019-2033[52]	282 245 873

Source: Ecorys, based on EIT internal data as of October 2025

The economic impact is analysed through desk research of already available data at the EIT, data provided by KICs, previous reports and assessments and reviewing the start-up data platform Dealroom. The surveys conducted among KIC-supported companies and KIC partners as part of the current study, as well as surveys conducted under another contract running in parallel on a 7-year assessment of EIT Manufacturing and EIT Urban Mobility, provided additional information to enable establishing economic impact. In addition, data provided by JRC was used, collected as part of their study, which has not been published yet. The JRC data were collected in mid-2025 through an online survey among graduates of EIT-labelled master's and doctoral programmes.

The impact of KICs' activities on the economy is measured based on the set of KPIs defined in the EIT Impact Framework 2022-2027, which follow the Horizon Europe impact pathways. Hence, when referring to economic impacts listed in the Impact Framework, a capitalised "Economic Impact" term will be used.

The detailed methodology used for this assessment, and all methodological considerations, are included in Annex 1.

2.1 Generating innovation-based growth

The KICs have significantly contributed to strengthening Europe's innovation base by supporting the Knowledge Triangle: businesses, education and research across key sectors.

[51] 2nd Partnership Agreement is subject to a positive 7-year assessment and EIT Governing Board (GB) Decision.
[52] 2nd Partnership Agreement is subject to a positive 7-year assessment and EIT GB Decision.

While the availability of data on revenues of KIC-supported companies is limited, their reported revenue growth is noteworthy. The companies that share the full data, representing 10% of all supported, report total revenue growth of EUR 1,13 billion. This represents an increase of 104%, compared to the baseline year. Throughout the years, the companies supported by KICs generated a cumulative total of EUR 6,28 billion.

Beyond financial impact, the KICs played a central role in developing robust innovation ecosystems both nationally and transnationally. Their support led to the creation of 1 144 start-ups,[53] assistance to 9 438 start-ups and scale-ups, and the graduation of 130 101 students from EIT-labelled programmes, of which 7 468 graduated from EIT-labelled Master's and Doctoral degrees. The dynamic engagement of the KICs is further evidenced by the 2 283 active partners maintained between 2023 and 2025, showcasing their strong collaborative presence across sectors.

2.1.1 Approach, data sources and limitations

The economic growth generated by the KICs' support is measured through five EIT Impact Framework KPIs:

- Contribution to revenue growth of organisations trading or employing innovations developed with the KIC support.
- Number and revenue of start-ups and scale-ups supported by KICs that are trading 3 years after KIC support ceased.
- Visible innovation ecosystems not previously in existence.
- Share of indicated innovation ecosystems that cover RIS countries.
- Revenue from the innovations launched on the market.

The main data sources for the analyses come from the Dealroom database and from EIT data based on KICs reports. Dealroom contains data on annual revenue for each start-up/scale-up supported or created by the KICs, and indicates, in some cases, the year this start-up has been supported by the respective KIC. However, data was not available for all of the registered companies, and not all companies supported by the KICs are registered in Dealroom. In addition, data entries are missing for some years (summarised in Table 2 below). EIT Food KIC provided some additional data on startups supported that were included in the study.

Table 2. Number of companies created or supported by EIT KICs that shared data on revenues

KIC	# of companies in Dealroom (2025)	# of companies in Dealroom for which data is available	Additional companies with data on revenues[54]	Total # of companies with data on revenues	Share of companies for which data is available
EIT Climate-KIC	2 415	564		564	25,5%
EIT Digital	546	299		299	27,0%
EIT InnoEnergy	190	75		75	12,4%
EIT Health	1 428	613		613	26,1%
EIT RawMaterials	314	161		161	18,8%

[53] Summarising EITHE04 and EITHE05
[54] Pitchbook data supplied by the EIT Food, see below for details.

EIT Food	289	115	142[55]	257	18,5%
EIT Manufacturing	188	79		79	7,3%
EIT Urban Mobility	461	215		215	17,6%
Total	**5 831**	**2 121**	142	**2 263**	**21,4%**

Source: Ecorys, based on Dealroom data

Table 3 provides an overview of data completeness regarding company revenues three years after initial KIC support (T+3). The first column indicates the number of companies that reported revenue data at the T+3 mark, while the second column shows how many of those companies also provided revenue data for the reference year (T0). This comparison highlights the subset of companies for which a full revenue trajectory, from the start of support to three years later, is available. Notably, EIT Health has the largest number of companies reporting revenues at both points, followed by EIT Climate-KIC and EIT Digital. Some KICs, such as EIT Food, did not have reported data for this period; however, where possible and aligned with the methodology, the data were supplemented with revenue data from PitchBook.[56] Overall, Table 3 emphasises the varying levels of data availability across KICs for longitudinal revenue analysis.

Table 3. Data completeness – company revenue 3 years after initial KIC support

KIC	#companies with data on revenues T+3	Companies with data on revenues T+3 and T0
EIT Climate-KIC	91	64
EIT Digital	150	58
EIT InnoEnergy	5	5
EIT Health	442	264
EIT RawMaterials	43	26
EIT Food[57]	0	0
EIT Manufacturing	6	4
EIT Urban Mobility	0	0
Total	**737**	**421**

Source: Ecorys, based on Dealroom data

For the analysis of revenue growth, we distinguish between two categories of companies identified in the Dealroom database:

- **Companies with indicated KIC support** – these are companies where one or more EIT KICs are listed as investors. This implies that the support provided was likely financial (e.g. equity investment or grants).
- **Companies without indicated KIC support** – these are companies for which no EIT KIC is listed among investors. However, they are still considered part of the EIT ecosystem, suggesting that the support received was likely non-financial in nature (e.g., mentoring, training, incubation, or network facilitation).

The analysis assumes that companies in both groups benefited from EIT KIC engagement, though the nature of support differs. It is important to note that the Dealroom data does not always specify the date when support was

[55] Pitchbook data.
[56] It has to be noted, that the data provided by the EIT Food form Pitchbook is structured differently than the Dealroom data.
[57] Pitchbook data does not include the information about the years of support provided.

initiated. As such, this limitation is acknowledged in the section presenting revenue growth data, and interpretations are made accordingly.

Additionally, many start-ups and scale-ups received funding from multiple sources beyond the EIT KICs. As a result, it is not possible to isolate the direct contribution of KICs to revenue growth. The available data refers to overall revenue for companies supported by KICs, not the share specifically attributable to KIC involvement. In some cases, companies were supported by more than one KIC. For the purposes of this analysis, such companies are included in the calculations for each KIC they are associated with. No attempt was made to disaggregate or apportion their performance among individual KICs. Therefore, the reported revenue growth figures reflect the company's overall performance and should be interpreted as a proxy, not a direct measure of the KICs' standalone impact.

2.1.2 Contribution per KIC

2.1.2.1 Support indicated (financial support)

The data presented in Table 4 illustrate the evolution of revenues generated by companies supported by EIT KICs over time, capturing not only newly supported ventures but also the continued revenue performance of companies supported in earlier years. This cumulative perspective reveals a clear pattern of revenue growth as cohorts of supported companies mature and scale, particularly evident from 2019 onwards. While year-to-year fluctuations remain visible, especially across individual KICs, the overall trend shows steadily increasing aggregate revenues up to 2022, reflecting the longer-term effects of EIT support. The more heterogeneous developments observed in 2021 and 2022 likely reflect a combination of factors, including differences in sectoral resilience, market conditions, and the lingering effects of the COVID-19 pandemic. The apparent decline in reported revenues in the most recent years should be interpreted with caution, as it is driven by reporting lags rather than a structural downturn in performance. **Overall, across the period covered, companies supported by the EIT KICs generated cumulative revenues of EUR 6,28 billion, highlighting the scale of economic activity associated with EIT-backed ventures over time**.

Table 4. Sum of the revenues of the companies that were supported in a given year or earlier (EUR M)

KIC	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025	Total
EIT Climate-KIC	0,02	1,99	9,05	66,40	111,64	169,93	243,98	120,18	1,97	3,60	728,76
EIT Digital	75,88	114,68	189,67	286,11	390,69	458,18	467,70	530,03	0,13	-	2 513,07
EIT InnoEnergy	-	-	-	-	1,04	1,24	1,68	6,43	0,30	-	10,69
EIT Health	5,23	14,32	96,91	234,15	299,19	372,91	511,34	640,99	9,34	14,19	2 198,57
EIT RawMaterials	1,55	4,94	11,32	36,67	62,31	125,12	187,06	101,57	2,40	-	532,94
EIT Food	-	-	-	-	-	-	1,30	2,54	-	-	3,84
EIT Manufacturing	-	-	-	0,03	0,19	0,28	0,41	0,49	-	-	1,40

EIT Urban Mobility	0,63	1,23	5,79	15,71	50,97	85,54	87,07	39,02	4,53	0,00	290,49
Total	83,31	137,16	312,74	639,07	916,03	1 213,20	1 500,54	1 441,25	18,67	17,79	6 279,76

Source: Ecorys, based on Dealroom and Pitchbook (EIT Food) data. See Section 2.1.1 for data completeness analysis.

The cumulative revenue growth following the initial support of the KICs is shown in Table 5, both in absolute figures and as a percentage increase from the first to the last available year with reported revenue data. For each company, the baseline year corresponds to the year in which KIC financial support was first received, while the last reported year is the most recent year for which revenue data were available (in most cases, 2023, and for some companies, 2024). The revenue growth indicator is calculated as the difference between the sum of revenues reported in the last available year across all included companies and the sum of revenues reported in their respective baseline years, and is expressed both as an absolute EUR difference and as a percentage change. **Based on this approach, the total revenue growth across all included companies amounts to EUR 1,13 billion, corresponding to an overall increase of 104%.**

Table 5 also reports the number of start-ups included in the calculation and the average revenue growth per start-up. Only companies with at least two reported revenue observations (baseline year and at least one subsequent year) and that were still operating were included, while companies with missing revenue data were excluded; explicitly reported zero revenues were retained as valid observations. The results show a clear upward trend in revenues, particularly when expressed as percentage growth. **Especially strong growth is observed among start-ups supported by EIT RawMaterials (256%) and EIT Climate-KIC (228%),** while in absolute terms the largest revenue gains are recorded by start-ups backed by EIT Digital and EIT Health.

This indicator is used as a proxy for the KPI measuring revenues of start-ups and scale-ups trading several years after KIC support, as gaps in available revenue data prevented the direct application of the original KPI definition without significantly reducing the sample size.

Table 5. Revenue growth of companies with a known (indicated) year of support provided by the KIC

KIC	Start-ups with data	Revenue growth (EUR M)	Average growth per start-up	Percentage increase[58]
EIT Climate-KIC	110	214,3	1,9	228%
EIT Digital	208	372,1	1,8	123%
EIT InnoEnergy	7	1,3	0,2	26%
EIT Health	542	353,1	0,7	64%
EIT RawMaterials	72	152,2	2,1	256%
EIT Food	2	0,8	0,4	58%
EIT Manufacturing	7	0,3	0,0	101%
EIT Urban Mobility	109	38,3	0,4	54%
Total	**1 057**	**1132,4**	**1,1**	**104%**

Source: Ecorys, based on Dealroom.

Revenue growth was not evenly distributed among the companies supported by the KICs. **On average, 65% of the supported start-ups (with known KIC investment year and available data) experienced an increase in**

[58] Calculated as the percentage change between total revenues in the last reported year and total revenues in the year the company received KIC support.

revenue. The proportion of companies with revenue growth is particularly high for EIT RawMaterials (82%). Table 6 presents both the number and the percentage of start-up companies that reported revenue growth among those for which data were available.

Table 6. Share of start-ups that recorded revenue growth among those with a known year of support provided by KIC

KIC	Start-ups with data	Start-ups that recorded revenue growth	Share of start-ups that recorded revenue growth
EIT Climate-KIC	110	79	72%
EIT Digital	208	138	66%
EIT InnoEnergy	7	5	71%
EIT Health	542	321	59%
EIT RawMaterials	72	59	82%
EIT Food	2 104*	2 83*	100% 80%*
EIT Manufacturing	7	5	71%
EIT Urban Mobility	109	62	57%
Total	**1 057** **(1 161)**	**671** **(754)**	**64%** **(65%)**

Source: Ecorys, based on Dealroom data, *Pitchbook EIT Food data

2.1.2.2 Support not indicated (other types of support)

In previous sections, the economic performance of companies that received financial support with a known year of support was examined. This section extends the analysis to companies that either received non-financial support or for which the year of financial support is unknown. As before, the analysis is limited to companies with available revenue data. Data for 2024 are largely unavailable, as most companies had not submitted their annual financial reports at the time of analysis.

Nonetheless, both the number of companies and their reported revenues show an upward trend in all the KICs. In 2023, a total of 462 companies in the database generated EUR 1,493 billion in revenues. Table 7 presents the sums of revenues of all the companies that reported revenues for a given year. **Both revenue values and the number of companies (presented in brackets) increased across all KICs**.

Table 7. Revenues of companies with an unknown year and type of support, EUR M (#companies)

KIC	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
EIT Climate-KIC	50 (52)	118,8 (82)	120,2 (132)	143,9 (153)	157,2 (167)	265,1 (234)	398,9 (294)	251,8 (250)	0,8 (2)	**1 506,7**
EIT Digital	7,3 (16)	179,3 (21)	237,3 (19)	344 (21)	510,5 (27)	544 (29)	565,9 (40)	525,8 (34)	551,9 (2)	**3 466**
EIT Food			17,9 (21)	20,5 (27)	28 (34)	41,5 (38)	55,1 (46)	68,5 (42)	0,1 (1)	**231,6**
EIT Health	1,9 (2)	2 (2)	2,4 (2)	181,2 (3)	260,5 (4)	359,4 (4)	399,9 (6)	383 (4)	379,1 (1)	**1 969,4**
EIT InnoEnergy	4,4 (23)	7,7 (34)	33,2 (40)	35,5 (43)	34,5 (44)	52,7 (40)	74,7 (35)	87,1 (26)	45,5 (1)	**375,3**

EIT Manufacturing					46,1 (56)	1550,1 (55)	65,1 (66)	83,8 (67)	0 (1)	**1 745,1**
EIT RawMaterials	11,1 (22)	12,3 (21)	13,7 (27)	15,9 (29)	14,4 (42)	18,9 (43)	24,7 (41)	84,5 (37)	0,1 (1)	**195,6**
EIT Urban Mobility					2,1 (1)	3,4 (2)	5,2 (2)	8,1 (2)	9,3 (2)	**28,1**
Total revenues	**74,7**	**320,1**	**424,7**	**741**	**1 053,3**	**2 835,1**	**1 589,5**	**1 492,6**	**986,8**	**9 517,8**

Source: Ecorys, based on Dealroom data. See Section 2.1.1 for data completeness analysis.

Table 8 presents revenue growth among a subset of companies with complete data: **482 companies reported revenues for both 2022 and 2023, and 266 companies for both 2020 and 2023.** Among these, revenue growth is substantial: over 100% between 2020 and 2023 for three KICs (EIT Climate-KIC, EIT Food, EIT InnoEnergy), and positive for all others. Growth between 2022 and 2023 is more mixed, with strong performance in some KICs (e.g. 38% for EIT Climate-KIC, 27,9% for EIT InnoEnergy, 27% for EIT RawMaterials), and slight declines in the cases of companies supported by EIT Digital and EIT Health.

It should be noted, however, that due to the lack of information on the type and timing of support, no clear attribution of growth to EIT support can be made. While EIT support likely contributed to the growth, other factors clearly played a role as well. Furthermore, because the year of support is unknown, it is possible that some companies that reported robust growth received the support later, and that EIT made no contribution to their growth.

Table 8. Revenue growth of companies with an unknown year and type of support

KIC	Data source	Revenue growth between 2020 and 2023	Revenue growth between 2022 and 2023[59]
EIT Climate-KIC	Dealroom	115,9% (86 companies)	38,0% (213 companies)
EIT Digital	Dealroom	9,4% (20 companies)	-3,2% (28 companies)
EIT InnoEnergy	Dealroom	106,1% (18 companies)	27,9% (24 companies)
EIT Health	Dealroom	48,0% (3 companies)	-3,5% (4 companies)
EIT RawMaterials	Dealroom	72,8% (21 companies)	27,0% (30 companies)
EIT Food	Dealroom	116,3% (25 companies)	23,6% (37 companies)
	Pitchbook	78% (53 companies)	28% (86 companies)
EIT Manufacturing	Dealroom	72,8% (40 companies)	13,8% (58 companies)
EIT Urban Mobility	Dealroom	NA	137,5% (2 companies)

Source: Ecorys, based on Dealroom data

2.1.2.3 Contribution per KIC

Table 9 presents the total revenues of companies three years after receiving initial support from KICs, broken down by the year of first support.[60] The data reveal how revenues evolve by cohort, starting year, and specific KIC. EIT Digital and EIT Health demonstrate consistently high revenue figures across multiple cohorts, with notable peaks in certain years. EIT RawMaterials shows significant revenue growth in later cohorts, while some KICs, such as EIT Food, lack data, indicating either limited reporting or unavailability of Pitchbook data. Overall, total revenues fluctuate by year of first support, reflecting varying maturity stages of start-ups and sector-specific growth

[59] Revenue growths are calculated only for the companies that reported the revenues for both 2022 and 2023; thus, the figures are different from the ones in previous columns.
[60] The values in this table show the revenues three years after the support, hence, e.g., the value for the 2014 shows the revenues generated in 2017 for support in 2014.

dynamics. For 2021, it should be noted that only a small fraction of companies have already reported revenue data for 2024 or three years after the support.

Table 9. Total revenues of startups three years after receiving KIC support, by KIC (EUR M)

KIC	Year of first support							
	2014	2015	2016	2017	2018	2019	2020	2021
EIT Climate-KIC	0,04		0,36	15,57	31,06	44,78	12,44	0,10
EIT Digital	45,96	55,99	6,82	44,84	26,56	80,57	68,08	
EIT InnoEnergy							1,71	
EIT Health			6,84	42,12	113,82	168,70	93,35	0,63
EIT RawMaterials	0,00	1,61	9,54	0,02	5,19	103,42	32,88	
EIT Food	no data[61]							
EIT Manufacturing				0,00	0,04	0,02	0,34	
EIT Urban Mobility								
Total	**46,00**	**57,60**	**23,56**	**102,55**	**176,67**	**397,49**	**208,80**	**0,73**
Year to date	**46,00**	**103,60**	**127,16**	**229,71**	**406,38**	**803,87**	**1 012,67**	**1 013,40**

Source: Ecorys, based on Dealroom data. See Section 2.1.1 for data completeness analysis.

Table 10 illustrates the revenue growth of startups supported by different KICs by comparing their last reported revenues with figures from three years prior. It includes the number of companies reporting data, absolute revenue growth, and percentage increase. **EIT Digital and EIT Health show the most substantial revenue growth both in absolute and percentage terms, reflecting strong scaling among their supported companies. EIT Food, EIT RawMaterials, EIT Urban Mobility and EIT Manufacturing also demonstrate remarkable percentage increases,** despite lower absolute revenue levels. The data highlights significant variation in revenue growth patterns across KICs, indicative of sectoral differences and the maturity of the supported startups.

Table 10. Revenue growth of supported startups between the last reported revenue year and 3 years earlier

KIC	#companies	Last reported revenue EUR M	Revenues 3 years prior last reported EUR M	Growth EUR M	% Growth	# and % of "high growth" companies
EIT Climate-KIC	207	612,4	413,3	199,1	48%	100 (48%)
EIT Digital	164	1354,2	414,8	939,4	226%	46 (28%)
EIT InnoEnergy	91	303,9	210,3	93,6	44%	47 (52%)
EIT Health	264	965,6	300,3	665,3	222%	115 (44%)
EIT RawMaterials	39	26,7	7,8	18,9	244%	13 (33%)
EIT Food[62]	36 104	64,2 350	36,1 86,2	28,2 194,85	78% 124,9%	18 (50%) 82 (78%)

[61] Pitchbook data shared does not contain data of support provided.
[62] The first value is based on Dealroom data, while the second is derived from Pitchbook. The cut-off date for the latest revenue figures was set to 2024 to ensure consistency. The values for totals in brackets represent the adjusted figures, including additional Pitchbook data. It should be noted that the Pitchbook data included one company that generated revenues higher than the sum of all the other companies combined. This company was excluded, as an outlier, due to the very high probability of misreporting or calculation error.

EIT Manufacturing	57	84,7	33,5	51,1	152%	20 (35%)
EIT Urban Mobility	72	80,4	33,1	47,3	142%	NA
Total	**930 (1 034)**	**3 492,1 (3 842,1)**	**1 449,2 (1 535,4)**	**2 042,9 (2 237,75)**	**141% (145,7%)**	**359 (39%) (441 (43%))**[63]

Source: Ecorys, based on Dealroom data.

We can also consider the distribution of growth at the firm level. Eurostat defines high-growth enterprises as those achieving an average annualised growth of more than 10% over a three-year period,[64] measured in terms of turnover or employment. Using this benchmark, **43% of the companies in our full sample qualify as high-growth** enterprises. The share varies across KICs, from 28% in EIT Digital to roughly half of the firms in EIT Food (78%), EIT InnoEnergy (52%), and EIT Climate-KIC (48%). Substantial proportions are also observed in EIT Health (44%), EIT Manufacturing (35%), and EIT RawMaterials (33%). **These results indicate that a significant portion of the portfolio exceeds the threshold used in European statistics to identify dynamic, fast-growing companies, underscoring the strong growth performance of the supported firms**. It should be noted that other classifications, such as the FT1000 Europe's Fastest-Growing Companies, use a similar cumulative growth rate as a benchmark. In the 2025 edition of a ranking, a threshold was set as a 3-year cumulative annual growth rate (CAGR) of 34,8%. Thus, it should be noted that **a considerable fraction of KIC-supported companies would fall into the category of Europe's fastest-growing firms**.[65]

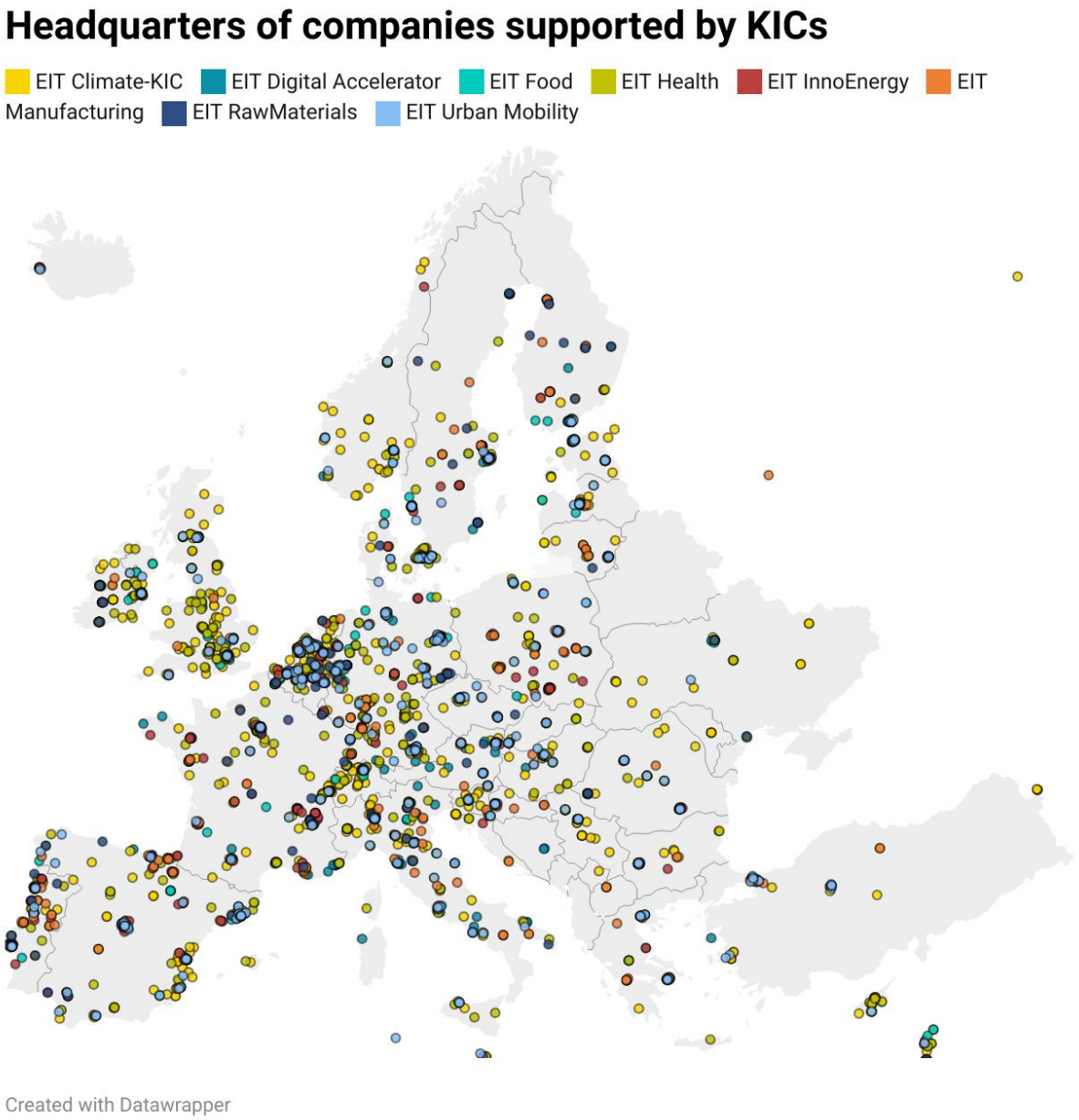
2.1.3 Geographical impact

2.1.3.1 Geographic distribution

Figure 6 below shows the geographic distribution of the companies supported by KICs. Each dot represents the location of the headquarters of the company, and its colour shows the particular KIC that provided support. The map shows that KIC-supported companies are distributed across virtually all regions of Europe, though several locations indicate significantly higher densities. This includes both some RIS regions (Portugal, northern Italy) and non-RIS regions (Belgium, the Netherlands).

[63] Including EIT Food data from Pitchbook.
[64] The incompleteness of the data in the Dealroom does not allow us to have a full picture of both the employment rate and the revenue growth, as companies that do provide both data are sparse, as was introduced in this report. For example, for EIT Climate-KIC, where there was the biggest sample of companies in the database, only 2% (72 out of 2416 in the database) reported employment (at all) of more than 10 people as of 2021. Therefore, for this, we are using only the revenue growth metric, and the conclusions should be treated with caution, and as a potential, rather than result. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=High-growth_enterprises_-_statistics.
[65] Financial Times. 2025. FT1000: Europe's Fastest-Growing Companies 2025 ranking. https://www.ft.com/content/cb3e317e-e3cc-4e4a-a506-b755b2f94bb1?.

Figure 6. Geographical distribution of companies supported by KICs



Source: Ecorys, based on Dealroom data

2.1.3.2 Geographical impact

As discussed in Section 2.1.2, the total revenue growth across all regions reached over **EUR 1,13 billion, or 104%, reflecting a substantial overall expansion**. The distribution of revenue growth across different geographic regions, as presented in Table 11, is clearly uneven. Primarily, the data highlights that **start-ups based in EU non-RIS countries generated the largest total revenue increase, with an average growth of EUR 1,5 million per start-up and a 142% overall increase**. In contrast, start-ups from EU RIS countries showed a moderate increase of 86%, while those from non-EU RIS and other non-EU countries experienced more modest growth rates of 36% and 41%, respectively. This geographic variation underscores the differing economic dynamics and market opportunities faced by companies depending on their location.

Table 11. Geographical distribution of revenue growth of start-ups with a known year of first support

Countries[66]	Start-ups with data	Revenue growth (EUR M)	Average growth per start-up (EUR M)	Percentage increase
EU Non-RIS Countries[67]	543	824,0	1,5	142%
EU RIS Countries	378	196,7	0,5	86%
Non-EU RIS Countries	13	106,0	8,1	36%
Other Countries	123	5,5	0,04	41%
Total	**1 057**	**1 132,2**	**1,14**	**104%**

Source: Ecorys, based on Dealroom data

The revenue growth over a three-year period for companies across different geographic categories is summarised in Table 12. It shows the last reported revenues alongside figures from three years earlier, with absolute and percentage growth calculated accordingly. **Companies located in Other Countries demonstrated the most substantial increase, with revenues rising by over 300%**. **EU non-RIS countries also performed strongly, nearly doubling their revenue over the period.** Similarly, firms in EU RIS countries saw robust growth of 87%, while non-EU RIS countries, despite a smaller sample size, reported the highest relative increase at 111%. Overall, the **group's total revenue more than doubled**, indicating dynamic and robust growth across diverse regions.

Table 12. Geographical distribution of revenue growth for startups in million EUR, where the year of support is unknown

Country category	#companies	Last reported revenue	Revenues 3 years prior to the last reported	Growth	% Growth
EU Non-RIS Countries	403	1 691,4	863,8	827,6	96%
EU RIS Countries	409	532,5	285,2	247,3	87%
Non-EU RIS Countries	7	23,1	11,0	12,1	111%
Other Countries	93	1 243,5	304,5	939,0	308%
Total	**912**	**3 490,5**	**1 464,5**	**2 026,0**	**138%**

Source: Ecorys, based on Dealroom data

Out of 5 509 individual companies[68] supported by KICs and registered in Dealroom (excluding duplicates) there are 4 384 that report data that can be used to indicate the survival rate. Among them 318 or 7% stopped operating by Q1 2025. As discussed earlier in this report, the companies registered in Dealroom represent a fraction of all the companies supported by KICs. There is no official data on the activity of the remaining companies. Hence, the values reported in this chapter do not cover all KIC-supported companies. Based on the Dealroom data only (which does not cover all the startups), we estimate the **survival rate to be over 90%.** This is similar, however, more positive, to the data provided in the previously conducted assessment of the KICs, as shown Table 13 below.

Table 13. Survival rate of ventures trading 3 years after KIC support ceased. Previous assessments

KIC and source	Survival rate of start-ups and scale-ups supported by KICs trading 3 years after KIC support ceased
EIT Climate-KIC	KIC Supported – 90% survival rate

[66] EU Non-RIS countries include: AT, BE, DE, DK, FI, FR, IE, LX, NL, SE; EU RIS countries: BG, CY, CZ, EE, EL, ES, HR, HU, IT, LV, LT, MT, PL, PT, RO, SK, SI; Non-EU RIS countries: BiH, IL, RS, TR, UA. There are no companies in the database regarding the remaining RIS countries (AL, ME).
[67] This includes companies with headquarters in: Canada, Hong Kong, Iceland, India, Norway, Singapore, Switzerland, Tunisia, United Kingdom, United States.
[68] This figure excludes duplicates, i.a. companies that were supported by more than one KIC.

Final Review of EIT Climate-KIC Report, November 2023	Control group – 98% survival rate
EIT Digital *Final Review of EIT Digital Report, November 2023*	KIC Supported – 88% survival rate Control group – 98% survival rate
EIT InnoEnergy *Final Review of EIT InnoEnergy Report, November 2023*	KIC Supported – 81% survival rate Control group – 98% survival rate
EIT Health	N/A
EIT RawMaterials	N/A
EIT Food *7-Year Review of EIT Food Report, April 2024*	KIC Supported – 84% survival rate Control group – 98% survival rate
EIT Manufacturing	N/A
EIT Urban Mobility	N/A

Source: Ecorys, based on KIC reviews

Revenues of KIC-supported start-ups three years after support ceased are particularly hard to estimate. Among the companies for which the year of last support is known, only 760 shared data on their revenues three years after the last support (T+3). This figure includes 436 companies that provide revenue data for the baseline year, allowing us to calculate revenue growth. The revenues of supported companies increased throughout the evaluation period and reached a peak of EUR 397,5 million in 2022 (for the companies supported three years prior, in 2019). The data for 2023 and 2024 are not yet fully available; thus, the figures reported represent a fraction of the total revenues.

Table 14 below shows the total revenues of companies supported by KICs three years after the support. While the distribution across individual countries varies significantly, there is a clear dominance among the EU countries that are not RIS. It can also be noted that the revenues of the start-ups supported after 2017 grew significantly, indicating that the impact of EIT support is increasing. Similarly to the previous discussion, data for 2021 represent only a small fraction of companies supported, as data on revenues in 2024 are usually not yet available.

Table 14. Total revenues of supported enterprises three years after receiving support, broken down by country (EUR M)

KIC	Year of the last support							
	2014	2015	2016	2017	2018	2019	2020	2021*
EU Non-RIS Countries	44,44	46,38	16,27	88,59	118,97	318,57	97,20	0,63
EU RIS Countries	1,51	8,58	4,88	5,74	43,66	29,60	81,77	0,10
Non-EU RIS Countries							8,99	
Other Countries	0,05	2,64	2,41	8,30	14,04	49,31	55,46	
Total	**46,0**	**57,6**	**23,6**	**102,6**	**176,7**	**397,5**	**243,4**	**0,7**
YTD	**46,0**	**103,6**	**127,2**	**229,8**	**406,5**	**803,9**	**1 047,4**	**1 048,1**

Source: Ecorys, based on Dealroom data; * incomplete data. See Section 2.1.1 for data completeness analysis.

2.1.4 Visible innovation ecosystems not previously in existence

Beyond financial impact, the KICs played a central role in developing robust innovation ecosystems both nationally and transnationally. This reflects the EIT's added value as an ecosystem-oriented model, where Knowledge Triangle Integration supports cross-sector connectivity and strengthens the collaboration capacity underpinning innovation performance. Their support led to the creation of **1 144** start-ups, assistance to over **9 438** start-ups and scale-ups, and the graduation of **130 101** students from EIT-labelled programmes.

For the effective development and valorisation of innovations, the EIT has invested in developing viable and visible innovation ecosystems by establishing bridges between different professional groups (a part of the Knowledge Triangle approach) and laying the groundwork for collaboration between the key drivers of a knowledge-based society. This ecosystem-building role is reinforced through the EIT's place-based dimension, including the EIT Regional Innovation Scheme (EIT RIS), which supports embedding KIC activities in local and regional ecosystems while maintaining pan-European connectivity through cross-border collaboration.

Reporting the contribution-per-sector indicator could be subjective unless it is well justified and supported by evidence. Therefore, our approach to measuring it is based on sub-indicators that define the scale of and cover the elements of the KPI definition.

The innovation ecosystems developed by the KICs were established based on information indicating the presence of new players or strengthened capacity and cooperation. Therefore, to establish the KIC's contribution to the creation of innovation ecosystems, the following sub-indicators were used:

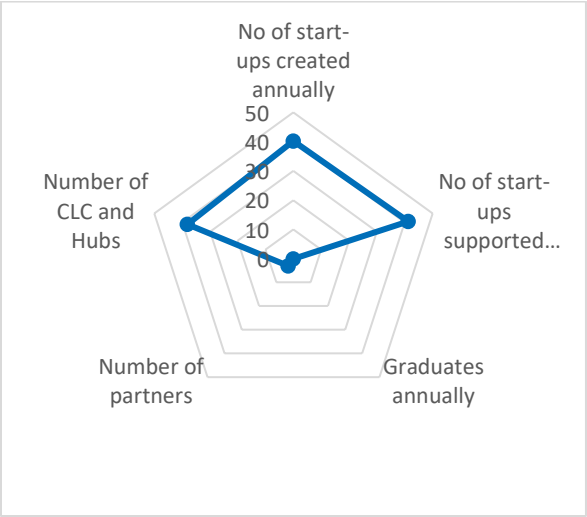
- Number of entities established by the KICs.
- Number of active partners.
- Number of start-ups created.
- Number of start-ups supported.
- Graduates from EIT-labelled programmes.

All of the above indicators combine to define the multidimensional nature of the KPI "Visible innovation ecosystems not previously in existence".

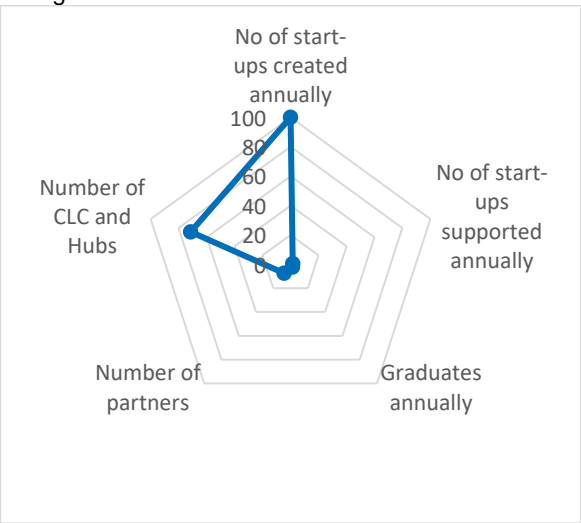
For the purpose of representing the main strengths of each KIC, we transformed and standardised the values of each sub-indicator into z scores and then rescaled them to a 0 to 100 range (where 0 represents the KIC with the lowest score for the respective sub-indicator and 100 represents the KIC with the highest score). We then applied a multidimensional analysis to highlight the areas in which each KIC demonstrates the highest and lowest contribution to the establishment of innovation ecosystems (Figure 7). For example, EIT InnoEnergy's main strengths are educational activities and HEI collaboration, as it scores highest in the number of graduates.

Figure 7. Multidimensional representation of the performance of KICs in supporting the establishment of innovation ecosystems (transformed values)

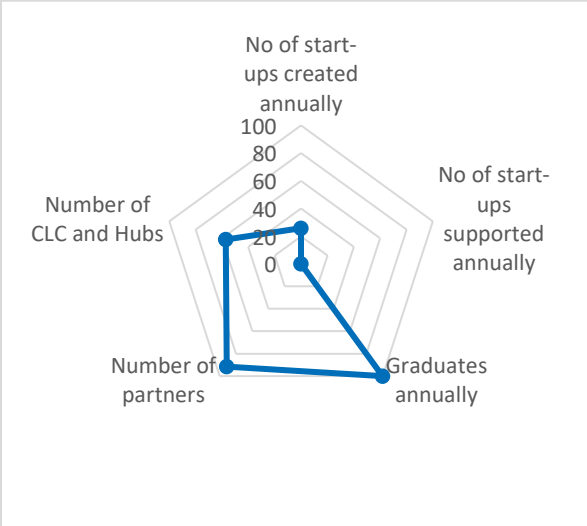
EIT Climate



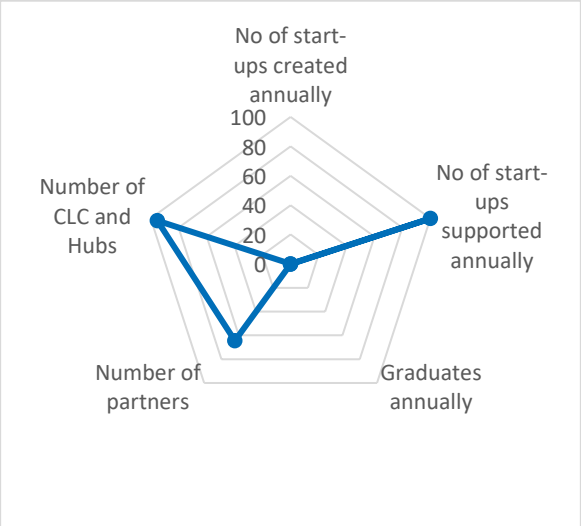
EIT Digital



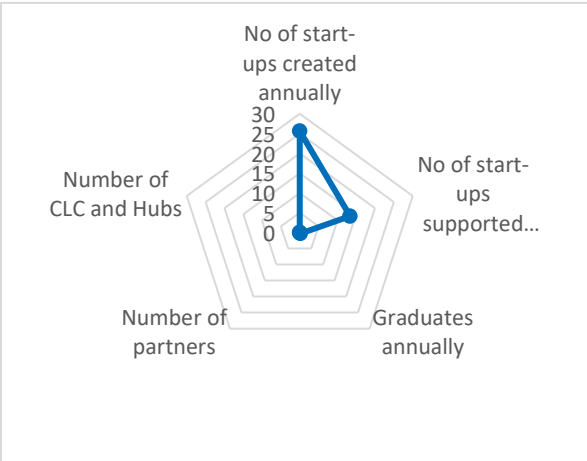
EIT InnoEnergy



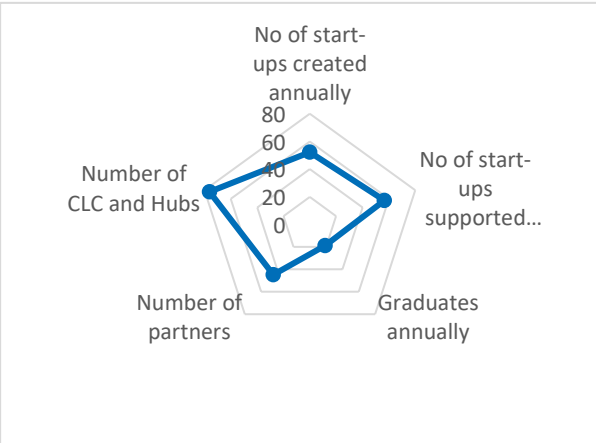
EIT Health



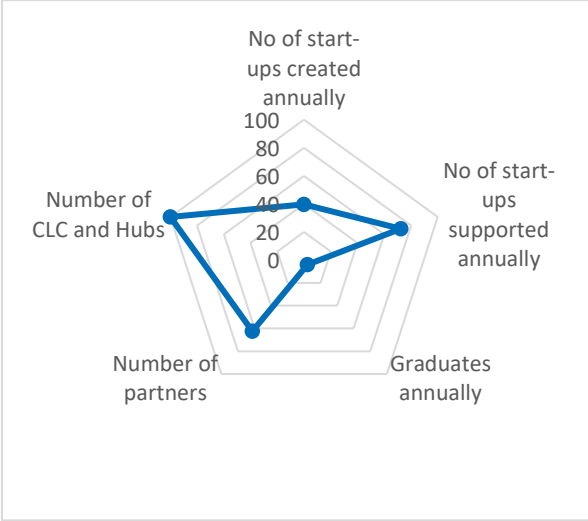
EIT RawMaterials



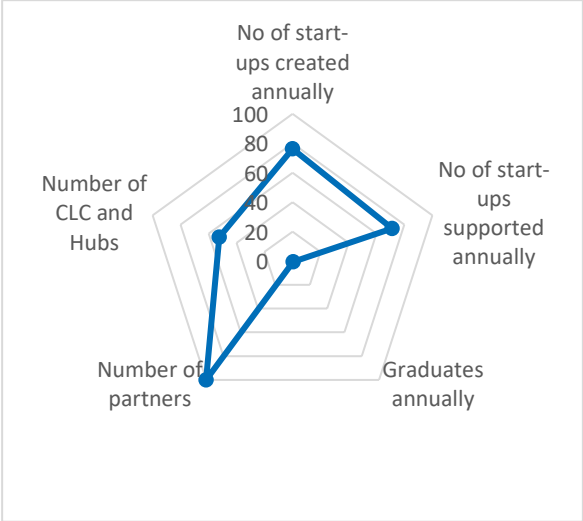
EIT Food



EIT Manufacturing



EIT Urban Mobility



Source: Ecorys, based on EIT data

The main data extracted for the quantitative analyses of these sub-indicators are taken from information provided by the EIT: the number of start-ups created and supported annually, and graduates from EIT-labelled programmes, the number of CLCs and hubs (EIT RIS Hubs; EIT Community RIS Hubs), and the number of active partners. For the qualitative analyses, the KIC impact reports and survey data from KIC partners have been used. The analysis of the sub-indicators is presented below.

2.1.4.1 Number of entities established by the KICs

Throughout their lifespans, the KICs have established structures in EU Member States and Horizon Europe-associated countries with the purpose of strengthening the regional contributions. These are CLCs, EIT RIS Hubs and EIT Community Hubs. They serve as outreach and coordination points that connect the EIT KICs with local ecosystems and contribute to the development of new innovation ecosystems.

CLCs and RIS Hubs are the key structures facilitating KIC activities in their local ecosystems. CLCs are physical hubs that promote links between and active collaboration among Knowledge Triangle actors, and act as focal points for knowledge exchange, through which the KIC partners are able to access both the facilities and the expertise needed to pursue their common objectives.[69]

EIT RIS hubs are similar structures, established by a KIC in a Member State or an associated country targeted by the Regional Innovation Scheme that serve as focal points for the KIC activities. While CLCs typically operate in more mature innovation environments and serve as regional hubs for innovation and collaboration, RIS Hubs focus on building innovation capacity in less developed ecosystems, particularly in countries with limited EIT presence. CLC and RIS Hubs aim to:

- Strengthen local innovation ecosystems by providing support to start-ups, innovators, and learners through training, mentorship, events, and access to EIT programmes.
- Attract and integrate new stakeholders into the EIT Community by facilitating engagement and awareness activities.

[69] European Commission. 2021. Regulation (EU) 2021/819 of the European Parliament and of the Council of 20 May 2021 on the European Institute of Innovation and Technology. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32021R0819.

- Foster collaboration and synergies between local actors and the broader EIT network.
- Coordinate with other Hubs, CLCs, and KIC offices to support cross-community collaboration and maximise impact across regions.

As of 2023, EIT Community Hubs are being established[70] to ensure more balanced and coordinated support across all EIT RIS-eligible countries and regions. Their main role is to serve as central access points for information, services, and opportunities offered by the entire EIT Community. Thus, they integrate and coordinate the work of existing RIS Hubs under a unified structure, leading to the merger of existing EIT RIS Hubs.

The total of all mentioned entities can serve as an indication of KIC's efforts in developing new innovation ecosystems (Table 15).

Table 15. Number of entities (CLCs, EIT RIS Hubs, EIT Community Hubs, KIC LE) in the EIT network in 2025

KIC	Number of entities (all)	Number of entities (RIS)	Number of entities (non-RIS)
EIT Climate-KIC	8	3	5
EIT Digital	20	10	10
EIT InnoEnergy	17	9	8
EIT Health	25	14	11
EIT RawMaterials	11	5	6
EIT Food	22	18	4
EIT Manufacturing	20	15	5
EIT Urban Mobility	12	9	3
EIT Community	24	24	0

Source: Ecorys, based on EIT data

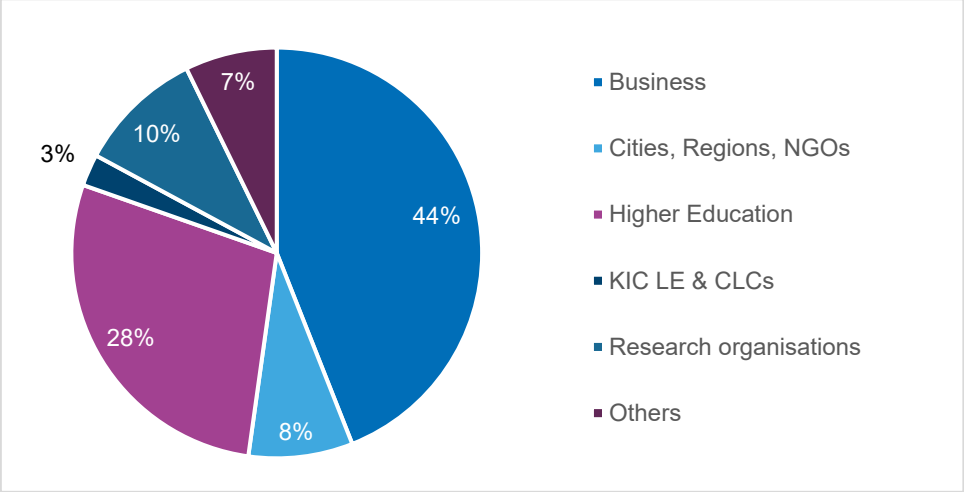
2.1.4.2 Number of active partners

The KICs have played a significant role in bringing together actors from across the Knowledge Triangle and fostering cross-sector collaboration. Recognising that partnerships are dynamic and that a thriving ecosystem is reflected in its active collaborations, we have focused on measuring the number of active partners during the period 2023-2025. This timeframe was chosen to capture the evolving nature of these relationships, as some partnerships may have concluded but could be renewed, while new ones may have recently begun.

The total number of active partners for the selected period is 2 283,[71] of which the majority are business entities (44%) and Higher Education Institutions (HEIs) – 28% (Figure 8).

[70] In the following RIS countries: Bulgaria, Croatia, Cyprus, Czechia, Estonia , Hungary, Italy, Latvia, Malta, Montenegro, North Macedonia, Slovenia, Türkiye, Ukraine, and Spain and Portugal covering their respective EU's Outermost Regions https://ec.europa.eu/regional_policy/policy/themes/outermost-regions_en.
[71] These are unique partners per participant area, based on the data reported by the EIT KICs.

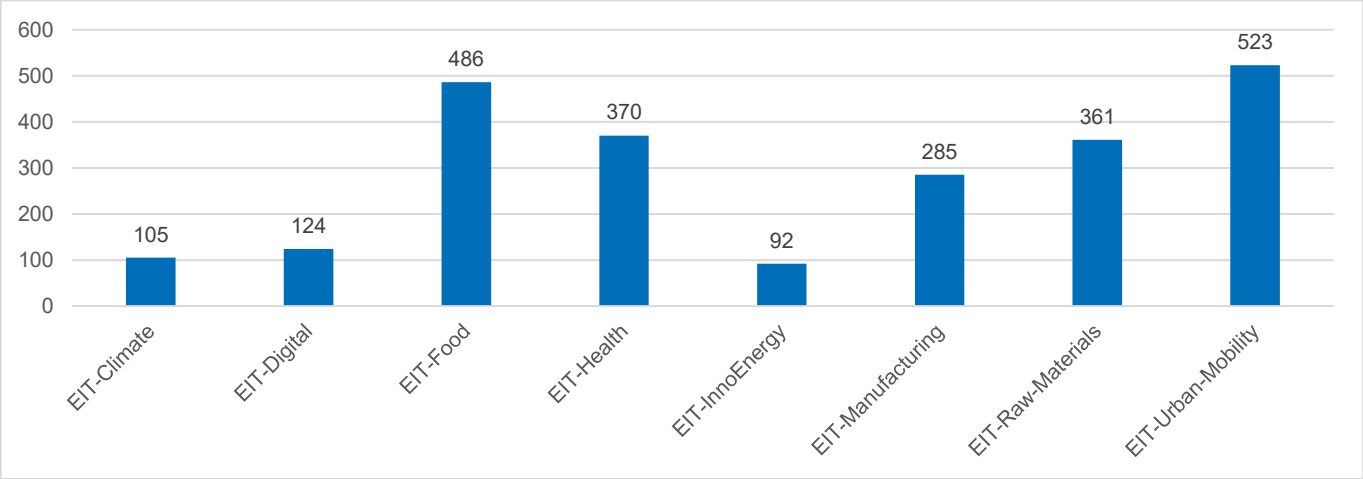
Figure 8. Share of active partners for the period 2023-2025, based on the type of partner



Source: Ecorys, based on EIT data

Most partners during the selected period have been maintained by EIT Urban Mobility (n = 523) and EIT Food (n = 486), as presented in Figure 9.

Figure 9. Number of active partners for the period 2023-2025 by KIC[72]



Source: Ecorys, based on EIT data

2.1.4.3 Number of start-ups created

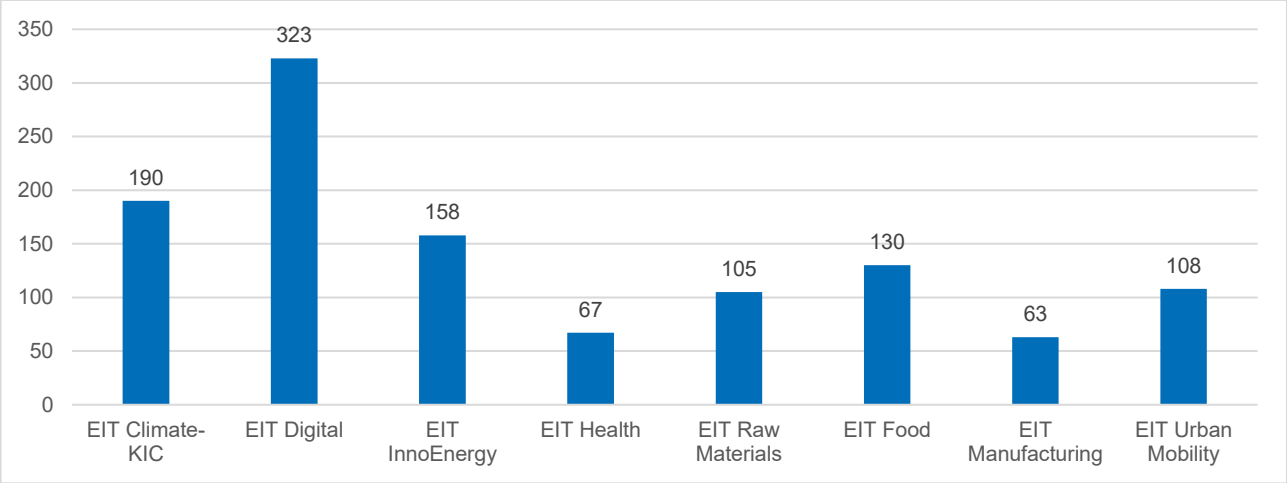
From their establishment until the end of 2024, the KICs created 924 start-ups through their programmes and initiatives. In addition, EIT-label graduates established 220 start-ups. These are new players in the existing innovation ecosystems. The first wave of KICs (EIT Climate-KIC, EIT Digital, and EIT InnoEnergy) has the highest contribution, having been in operation the longest. Nevertheless, EIT Food is performing equally well, even though it is not as mature as the aforementioned KICs.

The creation of start-ups strengthens innovation ecosystems by introducing new technologies, business models, and talent, while also attracting investment, fostering competition, and building networks across academia,

[72] The values sum up to a higher number as several organisations are partners to multiple KICs.

industry, and public institutions. Over time, this dynamic activity increases the resilience and global competitiveness of the ecosystem as a whole.

Figure 10. Number of start-ups created per KIC



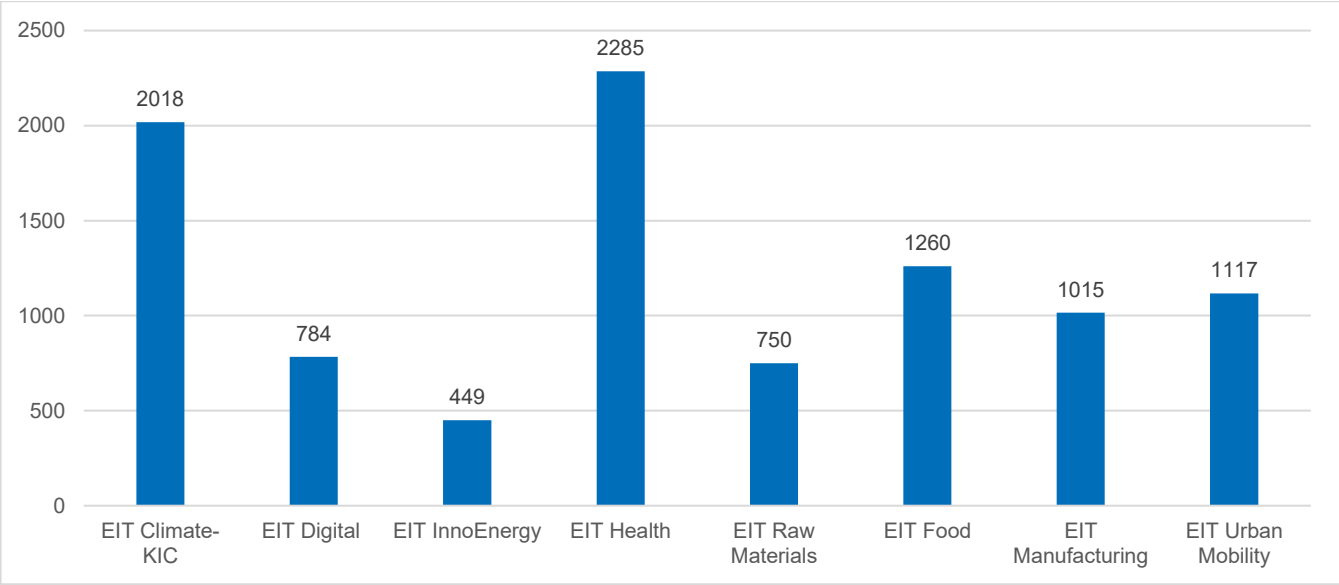
Source: Ecorys, based on EIT data

When calculating the average annual start-up creation per KIC, which removes the factor of KIC's operating years, EIT Digital remains the leader with an average of 33 companies created per year.

2.1.4.4 Number of start-ups supported

In addition to the number of start-ups created, other start-ups and scale-ups were, and continue to be, supported: for example, through grants, investments, and mentorship programmes. The total number of start-ups and scale-ups supported by the KICs up to the end of 2024 is 9 438 (Figure 11), with the highest number reached by EIT Health (n = 2 285), followed by EIT Climate-KIC (n = 2 018) and EIT Food (n = 1 260).

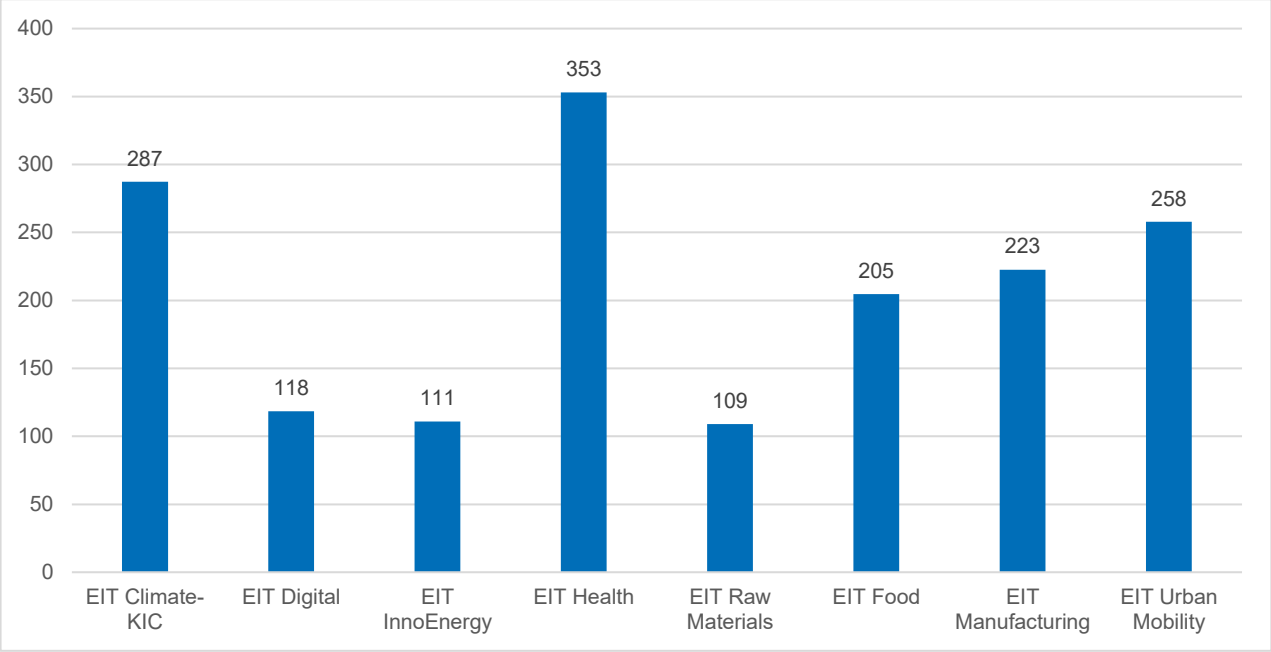
Figure 11. Number of start-ups supported per KIC



Source: Ecorys, based on EIT data; Duplicates included (start-ups supported by several KICs)

The lead in average start-ups/scale-ups supported annually is EIT Health (n = 353) (Figure 12).

Figure 12. Average number of start-ups supported annually for each of the KICs



Source: Ecorys, based on EIT data; Duplicates included (start-ups supported by several KICs)

2.1.4.5 Graduates from EIT-labelled programmes

The EIT and the KICs have a key educational role in fostering an innovative and entrepreneurial culture among EU youth. In addition to KIC direct or indirect support to start-ups, the EIT has supported the development and launch of EIT-labelled Master's and PhD programmes, as well as other educational programmes. In 2022, the EIT Label has also been extended to the new non-degree segments, covering KICs' professional and lifelong learning education. The number of graduates (Table 16) from those programmes is 130 101, with the biggest share reported by EIT InnoEnergy (n = 109 422), followed by EIT Food (n = 12 799). The third highest number is attributed to EIT Digital (n = 3 211). The analysis is based on data spanning from the establishment of each KIC until the end of 2024. From 2011-2016, no country or programme type information was collected; hence, for the 1 224 graduates reported during that period, data on the type of programme is not available.

Table 16. Number of graduates from EIT-labelled programmes per KIC

KIC	Doctoral degree	Master degree	Non-degree	Missing data	Total
EIT Climate-KIC	46	479		312	837
EIT Digital	60	2 303	470	378	3 211
EIT InnoEnergy	133	1 746	107 009	534	109 422
EIT Health	44	392	272		708
EIT RawMaterials	72	658	57		787
EIT Food		161	12 638		12 799
EIT Manufacturing	3	45	1 658		1 706
EIT Urban Mobility	18	84	529		631
Total	**376**	**5 868**	**122 633**	**1 224**	**130 101**

Source: Ecorys, based on EIT data

2.1.4.6 Geographical impact

The KIC contributions to the creation of innovation ecosystems are also considered in terms of impact on innovation ecosystems in RIS countries (KPI: Share of indicated innovation ecosystems that cover RIS countries) and in non-RIS countries.

Table 17. Visible innovation ecosystems for RIS vs Non-RIS countries 2015-2024

	No of start-ups created	No of start-ups supported	Graduates	Active partners	Number of CLCs and Hubs
RIS	44%	51%	52%	56%	67%
Non-RIS	56%	49%	48%	44%	33%

Source: Ecorys, based on EIT data

The EIT RIS was launched in 2014 and initially operated on a voluntary basis for the first seven years. Since 2021, it has become mandatory and an integral part of the EIT KICs' multi-annual strategies. Therefore, data on RIS countries for most sub-indicators is available for the time period 2021-2024: number of start-ups created, number of start-ups/scale-ups supported, and number of graduates from EIT-labelled programmes. The period for active partnerships calculated is the same as for the general overview of the visible KIC ecosystems (see section on Contribution per sector/KICs).

All KICs have made additional efforts to support countries classified as "moderate" or "modest / emerging" innovators in the European Innovation Scoreboard[73], thereby helping boost their ability to innovate. One of the main goals of the RIS is to improve the innovation capacities of local ecosystems through targeted capacity-building activities and stronger engagement between local knowledge and innovation actors, such as clusters, networks, regional public authorities, HEIs, research organisations, vocational education and training institutions, and SMEs.

In the 2021–2027 period, EIT RIS activities are expected to deliver increased regional impact, fully aligned with the EIT SIA[74] and the EIT Impact Framework, while being fully embedded in the KIC multi-annual strategies.

The KICs entities (CLCs, EIT RIS Hubs, EIT Community Hubs) are strategically located to foster innovation ecosystems at different levels of maturity. CLCs are typically based in countries with strong innovation capacities and serve as regional coordination and collaboration hubs. EIT RIS Hubs and EIT Community Hubs focus on widening participation and building capacity in less-developed ecosystems across EIT RIS countries. Many RIS countries host multiple types of KIC entities. For instance, Hungary, Poland, Spain, and Portugal host both CLCs and RIS Hubs, demonstrating strong integration into the EIT network. Most of KIC's on-the-ground offices are located in RIS countries – 107 of 159 (67%).

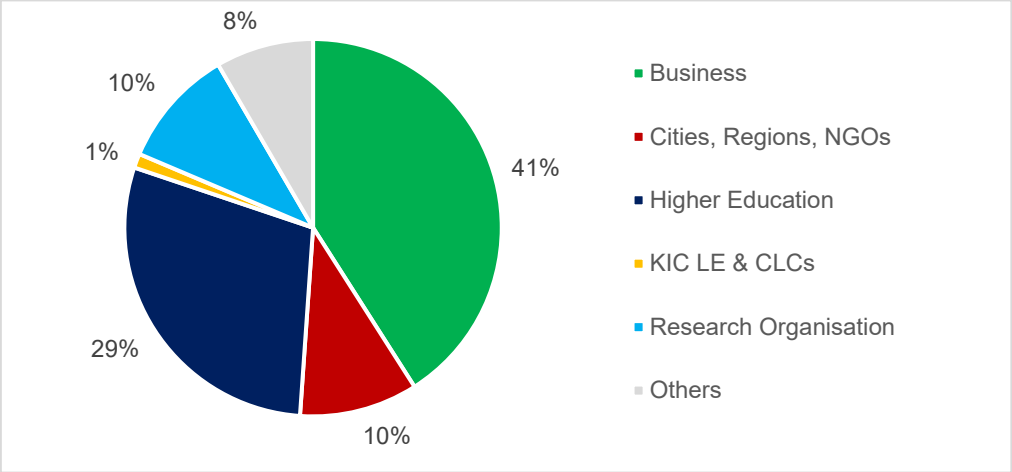
EIT Community Hubs are being introduced in all EIT RIS-eligible countries to consolidate support and coordination across the EIT Community. In 2025, the EIT RIS Expert Group reviewed the 2021-2024 KIC-by-KIC RIS data and found that between 2021 and 2024, individual EIT KICs demonstrated varying levels of engagement across RIS-specific key performance indicators. Based on the data provided by the EIT, EIT Urban Mobility, EIT Food, and EIT RawMaterials were the leading contributors in terms of EIT grant allocation to RIS countries, collectively accounting for over EUR 420 million.[75] In terms of venture support, **51% of KIC-supported ventures in 2021-2024 are located in RIS countries**. EIT Food (557), EIT Health (659), EIT Climate-KIC (686) and EIT Manufacturing (616) played a central role, reflecting strong entrepreneurial ecosystems in their respective domains. EIT RawMaterials stands out in education, having the highest number of participants in non-labelled

[73] European Commission. European innovation scoreboard. https://research-and-innovation.ec.europa.eu/statistics/performance-indicators/european-innovation-scoreboard_en.
[74] EIT. New EIT Strategy launched for 2021-2027. https://www.eit.europa.eu/news-events/news/new-eit-strategy-launched-2021-2027.
[75] This figure includes also 2025.

programmes from RIS countries, while EIT Digital excelled in innovation generation, launching 163 innovations in RIS countries, the highest among all KICs.

There have been 1 311 active partnerships in RIS countries for the period 2023-2025, which is 56% of all active partnerships of the KICs for the same period. **Most partnerships in RIS countries are with businesses (41%) and HEIs (29%), mirroring** the overall picture of KIC active partnerships (see Figure 13).

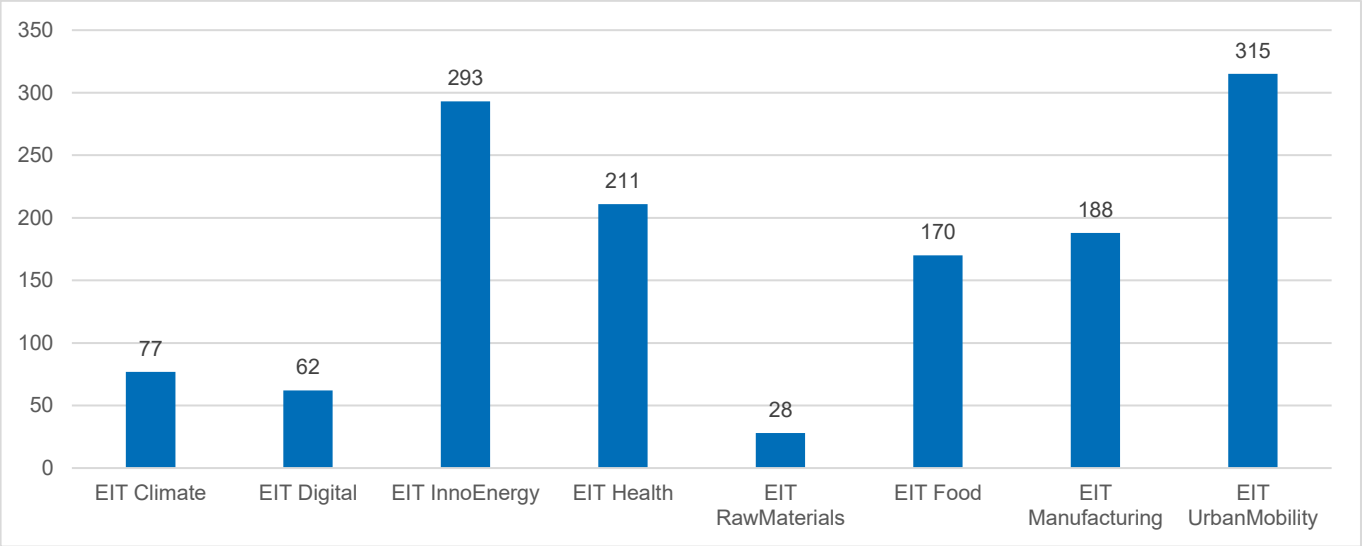
Figure 13. Number of active partners for RIS countries, only for the period 2023-2025, based on the type of partnership



Source: Ecorys, based on EIT Data

Most of the active partners in RIS countries for 2023-2025 are maintained by EIT Urban Mobility (n = 315) and EIT InnoEnergy (n = 293) (Figure 14).

Figure 14. Number of active partners for the period 2023-2025 per KIC for RIS countries only



Source: Ecorys, based on EIT Data

2.1.5 Revenue from the innovations launched on the market

Considering that this indicator is not regularly reported by the KICs, we relied primarily on survey-derived data from Ecorys and "7-year assessment of EIT Manufacturing and EIT Urban Mobility"[76] mid-2025 surveys among KIC partners and KIC-supported ventures. The respondents (n = 662) were asked whether they have used, adopted, or traded innovations developed with the support of the KIC, and also whether this has led to growth for the respective start-up or partner.

Because individual respondents could select multiple KICs, the sum of responses across KICs exceeds the total number of respondents. Therefore, the KIC-level data reflect multiple mentions and are not mutually exclusive.

2.1.5.1 Contribution per KIC

The highest rate of respondents who have either used, adopted, or traded innovations that were developed with the support of the KIC or know about other organisations using or trading them, is recorded for EIT RawMaterials (n = 56; 44,1%), followed by EIT InnoEnergy (n = 12; 36,4%) with an average of 30,7% for all of the KICs (Table 18). The number of respondents who answered positively to that question is 154. The respondents who answered that they know about other organisations using or trading KIC-supported innovations reported 2 627 such third parties who use or trade the innovations.

Table 18. Ventures and partners that have either traded or used KIC-supported innovations or know about other organisations using or trading them (per KIC)

KIC	Total # of responses	Respondents who confirm that they have either traded or used KIC-supported innovations, or know about other organisations using or trading them	Share of the positive answers	No, we did not trade/use innovations	Don't know/ Not applicable	Answers missing/ Blank
EIT Climate-KIC	56	16	28,6%	223	125	32
EIT Digital	68	16	23,5%	21	13	6
EIT InnoEnergy	33	12	36,4%	28	16	8
EIT Health	26	6	23,1%	4	13	4
EIT RawMaterials	127	56	44,1%	37	32	8
EIT Food	111	34	30,6%	8	8	4
EIT Manufacturing	124	33	26,6%	29	29	13
EIT Urban Mobility	117	30	25,6%	54	34	4
Total	662	203	**30,7%**	404	270	79

Source: Ecorys, based on a survey among start-ups supported by KICs, a survey of partners, as well as surveys carried out in mid-2025 as part of the 7-year assessment of EIT Manufacturing and EIT Urban Mobility

A significant proportion of respondents report growth caused by the adoption or trading of a KIC-supported innovation (61,1% of respondents who completed this field of the survey). The highest share of respondents who consider they have significant growth, caused by the adoption or trading of the KIC-supported

[76] For EIT Manufacturing and EIT Urban Mobility as part of their 7-year assessment, conducted by CSIL (https://www.csilmilano.com/).

innovation, is related to EIT Climate-KIC – 12,5%, with an average of 8,21%. The highest share of respondents who report either significant or some growth is attributed to EIT Urban Mobility (70%) (Table 19).

Table 19. Share of the ventures and partners reporting growth, caused by the adoption or trading of the KIC-supported innovation, out of the total number of answers to the question (per KIC)

KIC	Ventures and partners reporting significant growth, caused by the adoption or trading of the KIC-supported innovation	Ventures and partners reporting some growth, caused by the adoption or trading of the KIC-supported innovation
EIT Climate-KIC	12,5%	43,8%
EIT Digital	6,3%	50,0%
EIT InnoEnergy	8,3%	41,7%
EIT Health	0,0%	33,3%
EIT RawMaterials	10,7%	30,4%
EIT Food	11,8%	41,2%
EIT Manufacturing	6,1%	66,7%
EIT Urban Mobility	10,0%	70,0%
Total*	**8,21%**	**49,14%**

Source: Ecorys, based on a survey among start-ups supported by KICs, a survey of partners, as well as surveys carried out in mid-2025 as part of the 7-year assessment of EIT Manufacturing and EIT Urban Mobility. * The 'Total' row reports the unweighted mean across the eight KICs, calculated by averaging the respective percentage values (i.e., the sum of the eight percentages divided by eight).

2.1.5.2 Geographical impact

The partners and ventures that have used, adopted, or traded innovations developed with the support of the KIC, or know of other organisations that have, are almost equally distributed between RIS and non-RIS countries, respectively 70 and 68, with 16 entries where no country was reported. Ventures and partners that benefited from innovations developed with KIC support are located predominantly in Spain (n = 19), and Germany (n = 15), but also in Italy (11), Greece (10), France (10) and Sweden (10), the UK (9) and Finland (8). The number of ventures in other countries that report benefits from innovations developed with KIC support is much smaller, with some countries represented by only one such company. This is also likely to be a result of the low participation rate in the surveys of partners and ventures located in these countries.

The ventures and partners that report some or significant growth driven by an EIT-supported innovation are also evenly distributed between RIS (n = 38) and non-RIS countries (n = 39), with 16 entries where the country was not reported. Ventures and partners that report growth through using KIC-related innovations are located in Spain (n = 12), Germany (n = 7), France (n = 7), Greece (6), Sweden (6), Italy (5), the UK (4) and the Netherlands (4). The number of ventures from other countries reporting growth is smaller, which, again, is likely due to lower survey participation rates in these countries.

2.1.6 EIT's contribution to impacts

The EIT's impact on generating innovation-based growth was significant across the portfolio of ventures supported by KICs. This section assesses the economic and business-development outcomes associated with these ventures, summarising evidence on revenue growth and beneficiaries' perceptions of contribution, before turning to broader performance benchmarks that are more comparable across contexts – notably company survivability and the prevalence of high-growth firms. Together, these indicators provide a structured view of how KIC support

relates to venture performance, while recognising the methodological limits of attributing results to any single programme in a complex funding and support landscape.

2.1.6.1 Impact on revenue growth

The analysis presented in this chapter shows that the significant majority of companies supported by the KICs reported an increase in revenues. While growth trajectories vary across sectors and stages of development, the overall trend is positive. A number of firms recorded particularly strong performance, with a substantial share of the portfolio qualifying as "high-growth enterprises" under the Eurostat definition. This indicates that the KICs have supported a cohort that includes many of Europe's most dynamic young companies.

It is important to acknowledge that revenue growth cannot be attributed solely to KIC support. Start-ups and scale-ups typically experience a degree of organic expansion, and many of the companies in the portfolio also secured resources from a range of public and private programmes. Nevertheless, the available evidence suggests that the KICs have contributed to these outcomes. This is consistent with findings from management and innovation studies, which underline that access to early-stage finance, targeted acceleration services, and exposure to networks are associated with enhanced firm growth and performance.

In this regard, the KICs' support extends beyond financial assistance. Their offer typically combines direct funding with training activities, research and development facilitation, and, most importantly, opportunities for networking and collaboration across ecosystems.

The impact of public financial support, such as that provided by the KICs, on revenue growth is well established in the scientific literature. Research shows that access to external finance and support programmes can enable start-ups to expand more rapidly.[77] Beyond funding, accelerator and incubation schemes that combine training, mentoring, and networking opportunities are found to enhance firms' growth prospects by strengthening capabilities and opening access to markets and investors.[78] Similar conclusions are highlighted in European Commission studies, which emphasise that both financial and non-financial support contribute to the performance of high-growth innovative enterprises.[79]

The contribution of KIC support to revenue growth can also be assessed from the companies' perspective, which is considered the most reliable data source, given the diversity of support received over the years (investors, accelerators, incubators, etc). The data were gathered through two surveys carried out in mid-2025 as part of the current assessment: one among ventures supported by KICs and another among KICs' partners. The surveys targeted ventures and partners of the following KICs: EIT Climate-KIC; EIT Digital; EIT InnoEnergy; EIT Health; EIT RawMaterials; and EIT Food. Data on EIT Manufacturing and EIT Urban Mobility were collected through separate surveys running in parallel as part of KIC's 7-year assessment.[80]

In the survey, ventures were asked to what extent they believed that KIC support contributed to their economic achievements, including revenue growth.

The responses indicate that **a meaningful share of beneficiaries perceive the support as having had a decisive effect.** Almost half of the surveyed firms recognised KIC support as an important factor in their revenue development. These findings complement the revenue analysis presented earlier and provide an additional indication of the contribution of KICs to company performance.

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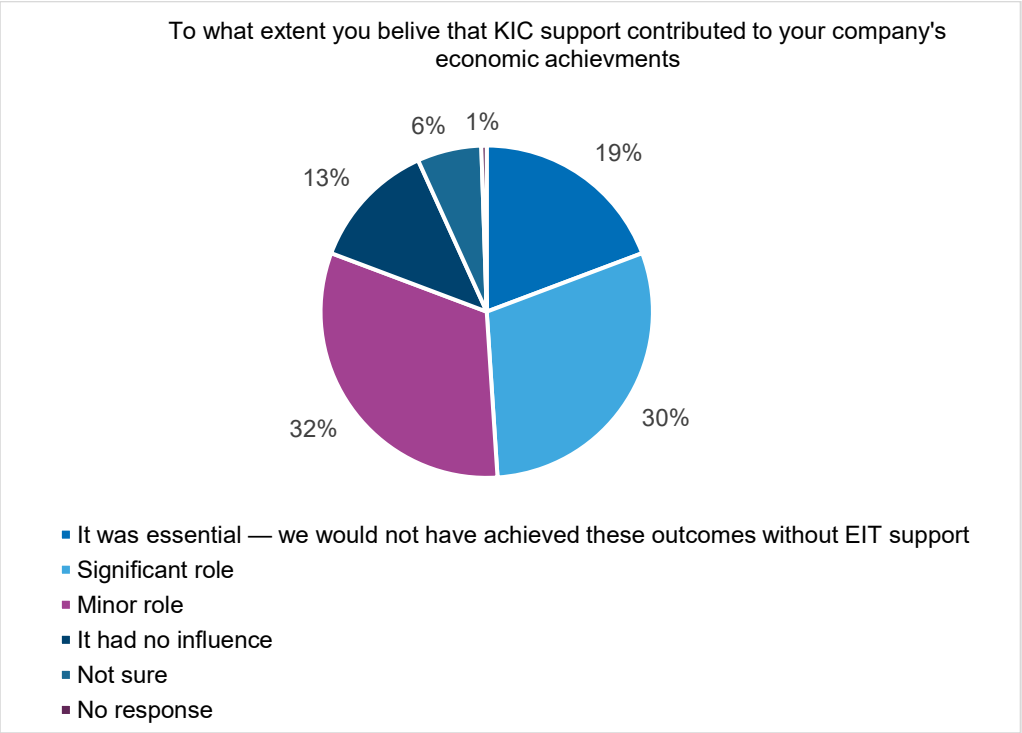
[77] See e.g. Lerner, J. (2010). The Future of Public Efforts to Boost Entrepreneurship and Venture Capital. Small Business Economics, 35(3), 255–264, Colombo, M.G. & Grilli, L. (2010). On Growth Drivers of High-Tech Start-Ups: Exploring the Role of Founders' Human Capital and Venture Capital. Journal of Business Venturing, 25(6), 610–626.
[78] See e.g. Clarysse, B., Wright, M., & Van Hove, J. (2015). A Look Inside Accelerators. Nesta Report.
[79] European Commission (2014). Benchmarking the Financial Support of High Growth Innovative Enterprises.
[80] See Annex 1 for details.

As presented in Figure 15, when asked about the extent to which EIT KIC support contributed to their company's economic achievements, such as revenue growth, investment attracted, or market expansion, 19% of respondents considered the support essential, stating they would not have achieved these outcomes without it. A further 30% indicated that it played a significant role, while 32% assessed the impact as minor. 13% reported no influence, and 6% were uncertain. As mentioned above, almost half of the respondents (49%) attributed essential or significant importance to EIT KIC support, while just under one-third viewed its role as limited.

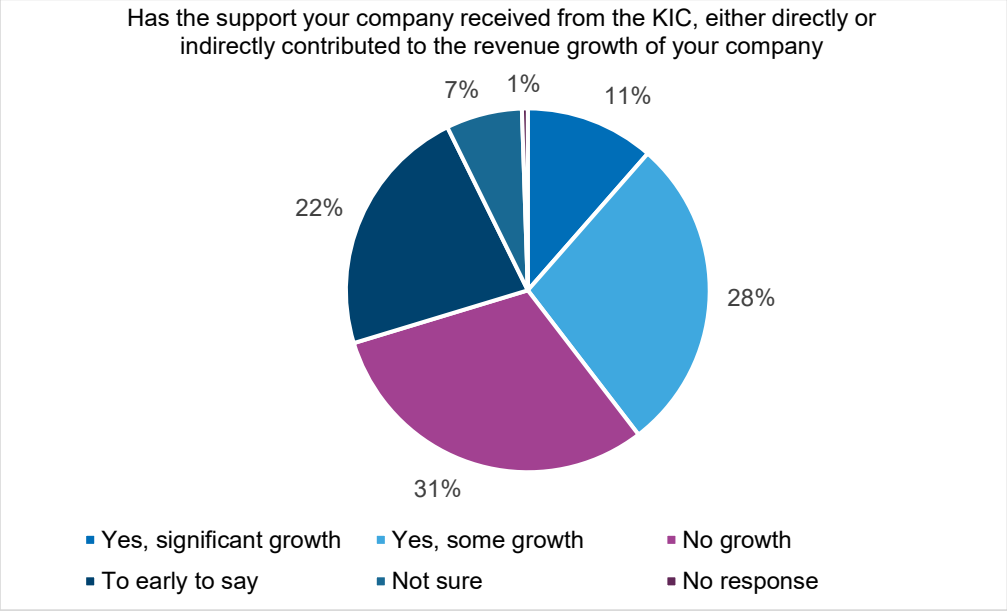
Figure 15. The extent to which ventures believe KIC support contributed to economic achievements



Source: Ecorys, based on the survey with ventures supported

When focusing specifically on revenue growth, the picture becomes more nuanced, as presented in Figure 16. 11% of respondents reported that EIT support contributed to significant revenue growth, and 28% indicated some growth. However, 31% saw no growth, and 22% judged it too early to assess the impact. A further 7% were unsure. These findings suggest that while **nearly four in ten ventures experienced measurable revenue benefits from EIT KIC support, for a sizeable portion the impact is either not yet visible or absent**.

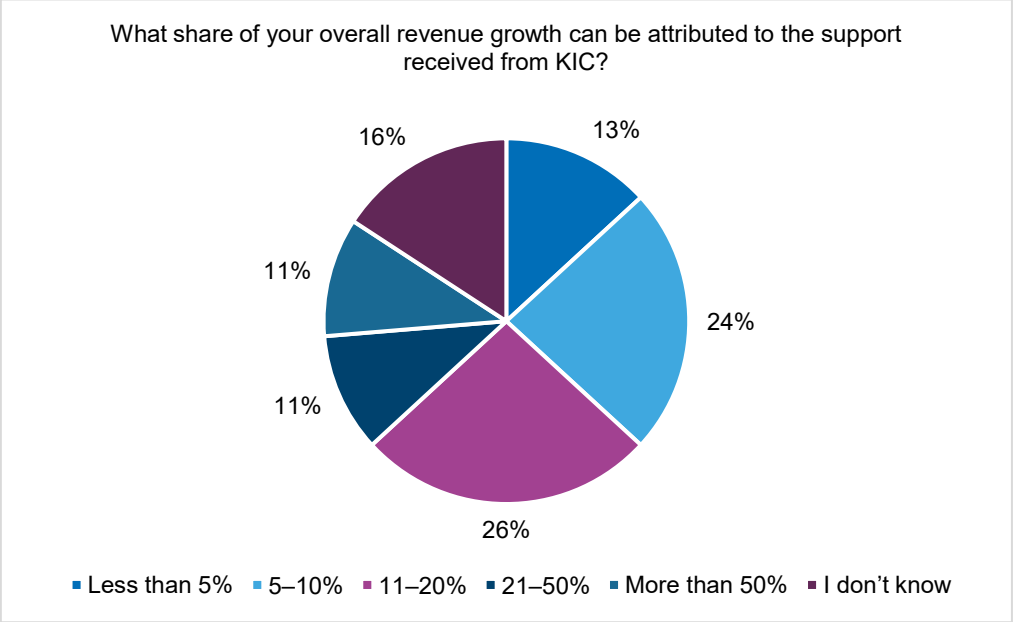
Figure 16. Ventures' observation on the EIT contribution to the revenue growth



Source: Ecorys, based on the survey with ventures supported

When ventures that observed KICs' contribution to the economic achievements were asked to estimate the share of their overall revenue growth attributable to EIT KIC support, responses reflected a broad range of experiences (Figure 17). Just over one-quarter of respondents (26%) indicated that between 11% and 20% of their growth could be linked to the support received. A further 24% attributed between 5% and 10% of their growth, while 13% reported a contribution of less than 5%. At the higher end, 11% of respondents stated that between 21% and 50% of their growth was attributable to KIC support, and another 11% considered that more than half of their revenue growth was due to it. Notably, 16% of respondents reported not knowing how to assess the share.

Figure 17. Share of revenue growth attributed to the support received



Source: Ecorys, based on the survey with ventures supported

These findings suggest that, for the majority of ventures that reported EITs' influence on their economic gains, **EIT KIC support has had a moderate but meaningful impact on revenue growth**, most commonly falling within the 5–20% range. However, the presence of a small but notable group of ventures that attribute more than 50% of their revenue growth to KIC involvement indicates that, for certain companies, **the support has been transformational**. At the same time, the relatively high share of respondents unable to quantify the contribution highlights the difficulty ventures face in isolating the impact of KIC support from other business and market factors, as noted above as an analysis consideration.

The previously conducted surveys, as part of the KICs assessments, provide some more insights into that, as presented in Table 20 below.

Table 20. Attribution of revenue growth. Previous assessments

KIC and source	Contribution to the revenue growth of organisations
EIT Climate-KIC *Final Review of EIT Climate-KIC Report, November 2023*	24% of the respondents indicated “None” 24% of the respondents indicated “Less than 5%” 15% of the respondents indicated “5-10%” 20% of the respondents indicated “10-20%” 6% of the respondents indicated “20-50%” 11% of the respondents indicated “More than 50%”
EIT Digital *Final Review of EIT Digital Report, November 2023*	9 of the respondents indicated “None” 5 of the respondents indicated “Less than 5%” 2 of the respondents indicated “5-10%” 2 of the respondents indicated “10-20%” 7 of the respondents indicated “20-50%” 6 of the respondents indicated “More than 50%”:
EIT InnoEnergy *Final review of EIT InnoEnergy Report, November 2023*	6 of the respondents indicated “None” 4 of the respondents indicated “Less than 5%” 6 of the respondents indicated “5-10%” 4 of the respondents indicated “10-20%” 2 of the respondents indicated “20-50%” 7 of the respondents indicated “More than 50%”
EIT Health *7-Year Review of EIT Health Report, March 2022*	63% of the respondents indicated “None or less than 5%”
EIT RawMaterials *7-Year Review of EIT RawMaterials Report, March 2022*	31 of the respondents indicated “None” 32 of the respondents indicated “Less than 5%” 15 of the respondents indicated “5-10%” 21 of the respondents indicated “10-20%” 12 of the respondents indicated “20-50%” 12 of the respondents indicated “More than 50%”
EIT Food *7-year Review of EIT Food Report, April 2024*	24 of the respondents indicated “None” 22 of the respondents indicated “Less than 0,5 million EUR” 1 of the respondents indicated “0,5-1 million EUR” 1 of the respondents indicated “2-5 million EUR” 1 of the respondents indicated “More than 10 million EUR”

Source: Ecorys, based on the EIT KICs reviews

The surveys conducted at that time provide results similar to those obtained in this study. The findings on ventures supported by EIT KICs indicate that most companies attribute a moderate share of their revenue growth to KIC support, typically in the 5–20% range. While the majority of ventures perceive EIT support as contributing to growth, for many, this contribution remains modest. However, there is a consistently meaningful share of ventures whose impact is transformative.

Figures presented in Annex 4, on the other hand, illustrate the survey results by KIC and by the type of support received. While positive assessments are found across all KICs, companies supported by EIT Climate-KIC stand out, with the majority reporting that support as essential or significant for each proposed type of support. In general, in terms of the nature of support, **financial and investment measures were most frequently identified as highly impactful across all KICs, followed by business acceleration activities and opportunities for ecosystem integration and collaboration.** Results show that KICs contribute not only through funding, but also by facilitating growth-oriented services and connections that are valued by supported ventures, which, as the above-mentioned literature suggests, is an important factor.

2.1.6.2 Impact on business development

The EIT's performance and impact on entrepreneurship and business development are diverse, reflecting the various ways the EIT can support the innovation ecosystem. The EIT supports start-ups and future entrepreneurs through a wide range of actions and mechanisms, demonstrates solid performance, and generates a comparatively strong overall impact, particularly when benchmarked against similar programmes and accelerators.

While the available data on company revenues and the complexity of funding mechanisms in which supported ventures participate (including the involvement of multiple investors and potential parallel participation in programmes such as the EIC Accelerator) do not allow for the establishment of a precise baseline, two robust metrics can nevertheless serve as valid benchmarks. A rigorous benchmarking exercise cannot be undertaken because:

- First, in many cases, the type of support provided by the KICs is not known, and even where investment support is identified, timing and modality vary, complicating any standardised assessment of impact.
- Second, supported start-ups are inherently innovative, placing them in a category of their own and making direct comparisons with more conventional enterprises inappropriate.
- Third, the vast majority of ventures are at very early, pre-market stages of maturity. As such, they cannot reasonably be compared to more established companies at later stages of market readiness, given their smaller size, higher risk profile, and novelty.
- Finally, this explains why comparisons with instruments such as the EIC Accelerator are not meaningful: whereas the EIT KICs focus on supporting early-stage innovation across a wide spectrum, the EIC Accelerator targets later-stage, deep-tech ventures close to market entry.

Taking these considerations into account, there remain two relevant and methodologically sound indicators that can be used to benchmark the performance of KIC-supported ventures in the European context. These are: (i) the survivability of companies, which reflects their ability to withstand the critical early years of development; and (ii) the share of high-growth firms among supported ventures, as a measure of those demonstrating particularly impressive development trajectories.

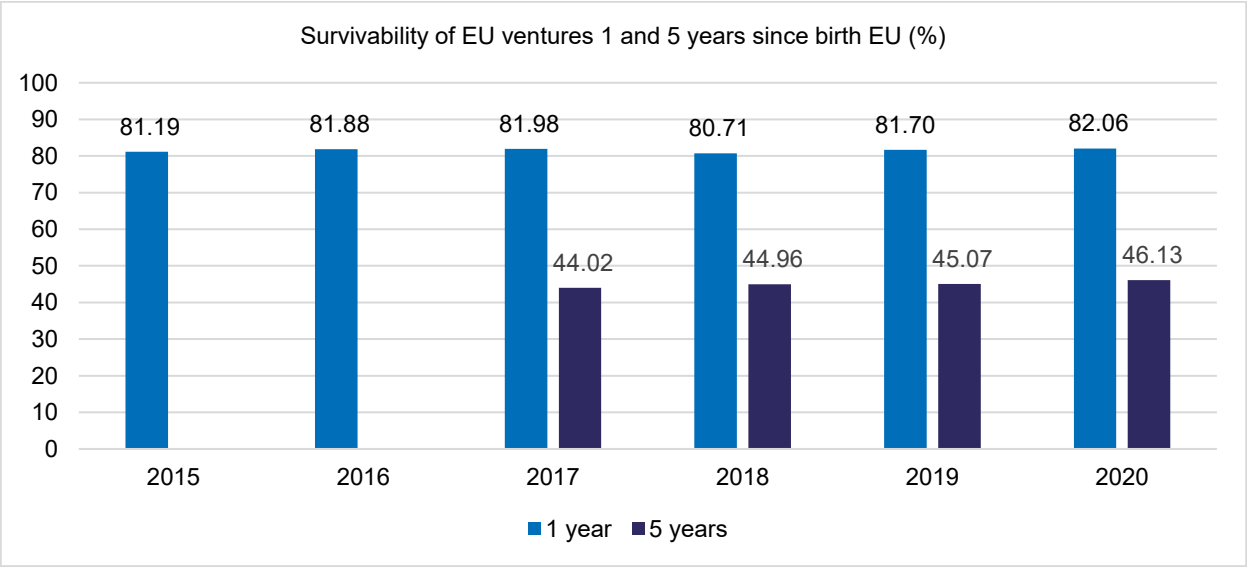
Focusing on survivability and the proportion of high-growth ventures provides a more rigorous and policy-relevant benchmark, as it circumvents the methodological limitations inherent in revenue-based measures, adheres to established international statistical standards, and yields insights that are both robustly comparable across the EU and directly informative for the study's purpose.

2.1.6.3 Survivability of companies supported

Enterprise survival rates provide an essential indicator of the resilience of Europe's entrepreneurial ecosystem. Short-term survival is relatively high; e.g., in 2020, the one-year survival rate stood at 82%, with notable national variations (Figure 18).

Longer-term survival presents a more challenging picture. For the 2014 cohort of new enterprises, less than half (45%) were still active after five years. Again, variation across states is pronounced.

Figure 18. Survivability of EU ventures



Source: Ecorys, based on Eurostat[81]

This pattern (short and long-term survivability) indicates that while most enterprises manage to establish themselves in the short run, structural weaknesses in competitiveness, access to finance, and market conditions contribute to high attrition over the medium term.

When benchmarked against these figures, **the performance of ventures supported by the EIT is particularly striking**. **Across cohorts and years, their survival rate consistently exceeds 90%, both surpassing the EU average for the first year and far outperforming the five-year benchmark.** This holds true even when accounting for differences in company maturity.

When benchmarked against similar programmes and accelerators, the survival rate of EIT-supported ventures remains high. The **survival rate of EIT-supported ventures (90%) is higher than the international StartupBootcamp (76%),[82] the German EXIST accelerator (77%),[83] and even the US Mass Challenge Early Stage Program (70%)**.[84]

This is, at least in part, because offering access to early-stage finance, targeted acceleration services, and exposure to networks are associated with enhanced firm growth and performance. In this regard, KIC support

[81] Eurostat. 2024. Business demography by size class and NACE Rev. 2 activity (2004-2020). https://ec.europa.eu/eurostat/databrowser/view/BD_9BD_SZ_CL_R2__custom_2514972/bookmark/table?lang=en&bookmarkId=90760fb3-1c29-43ba-a0b4-4062d2538c48
[82] Startupbootcamp.https://www.startupbootcamp.org/about/startupbootcamp.
[83] Federal Ministry for Economic Affairs and Energy of Germany, exist Model projects. https://exist.de/en/programm/exist-potentiale/ .
[84] Mass Challenge U.S. Early Stage Programs. https://masschallenge.org/united-states-early-stage/.

extends beyond financial assistance. Their offer typically combines direct funding with training activities, facilitation of R&I, and, most importantly, opportunities for networking and collaboration across ecosystems. The literature highlights that such non-financial support can be as important as capital in enabling start-ups to refine their business models, access partners and markets, and build the credibility needed to attract further investment.[85] In principle, these mechanisms reinforce the growth potential of supported companies and contribute to the broader development of Europe's innovation landscape.

Participation in accelerators can increase survival rates by as much as 23% compared to unsupported start-ups, particularly when admission is based on rigorous selection processes. The sectoral impact of such programmes is not uniform: high-tech and knowledge-intensive ventures tend to benefit disproportionately, as accelerators provide them with access to specialised expertise, investor networks, and tailored business development support, as evidenced by the data on the survivability of KIC-supported ventures.[86]

2.1.6.4 High-growth ventures

High-growth enterprises are defined statistically by Eurostat and the OECD as enterprises with an average annualised growth rate in employment (or turnover) greater than 10% per year over a three-year period, and with at least 10 persons at the start of the measuring period.[87] They are often referred to in policy discussions as scale-ups, as their growth trajectory extends beyond the start-up phase into rapid expansion, directly aligning with the EIT's core mission.[88]

In 2020, high-growth enterprises represented 9,4% of all enterprises in the EU's business economy, confirming their role as a minority share of firms with a disproportionately large impact on employment, innovation, and competitiveness. The prevalence of them varies significantly across sectors, with higher concentrations in knowledge-intensive industries such as ICT and professional services, and lower representation in more traditional sectors, as presented in Table 21.

Table 21. High growth enterprises (growth by 10% or more) % of EU enterprises

The 'statistical classification of economic activities' in the European Community	2018	2019	2020
Business economy, except activities of holding companies	11,88	11,46	9,43
Mining and quarrying	9,30	n/a	8,08
Manufacturing	10,79	9,98	7,91
Electricity, gas, steam and air conditioning supply	8,26	8,18	n/a
Water supply, sewerage, waste management and remediation activities	11,21	11,49	9,90
Construction	11,42	11,27	9,87
Wholesale and retail trade; repair of motor vehicles and motorcycles	10,54	10,10	8,56

[85] E.g. Cassar, G. (2014). Industry and startup experience on entrepreneur forecast performance in new firms. Journal of business venturing, 29(1), 137-151; Colombo, M. G., & Grilli, L. (2010). On growth drivers of high-tech start-ups: Exploring the role of founders' human capital and venture capital. Journal of business venturing, 25(6), 610-626.
[86] E.g. Madaleno, M., Nathan, M., Overman, H., & Waights, S. (2021). Incubators, accelerators and urban economic development. Urban Studies, 59, 281 – 300; Butz, H., & Mrożewski, M. (2021). The Selection Process and Criteria of Impact Accelerators. An Exploratory Study. Sustainability; Longo, M., & Zouhar, J. (2019). Do business incubators really enhance entrepreneurial growth? Evidence from a large sample of innovative Italian start-ups. Technovation.
[87] The incompleteness of the data in the Dealroom does not allow us to have a full picture of both the employment rate and the revenue growth, as companies that do provide both data are sparce, as was introduced in this report. For example, for EIT Climate-KIC, where there was the biggest sample of companies in the database, only 2% (72 out of 2416 in the database) reported employment (at all) of more than 10 people as of 2021. Therefore, for this we are using only the revenue growth metric, and the conclusions should be treated with cautiousness, and as a potential, rather than result.
[88] Eurostat. High-growth enterprises – statistics. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=High-growth_enterprises_-_statistics.

Transportation and storage	14,12	13,45	11,59
Accommodation and food service activities	11,06	10,67	6,09
Information and communication	17,75	17,93	16,97
Financial and insurance activities	n/a	n/a	n/a
Real estate activities	8,41	8,39	7,69
Professional, scientific and technical activities	13,34	13,45	11,51
Administrative and support service activities	15,88	14,61	11,92

Source: Ecorys, based on Eurostat[89]

According to the European Investment Bank, 16% of European firms reported high profits in 2024, defined as profits exceeding 10% of turnover. This figure is broadly consistent with 2023 (17%) but remains below historical averages across most sectors. High profitability is not only a measure of firm performance but is also strongly correlated with future investment activity: companies with profits above 10% of turnover are up to eight percentage points more likely to increase investment compared to less profitable firms. This relationship further highlights the importance of a favourable business environment, particularly critical for investment-intensive industries and high-tech sectors, in line with the EIT's priorities.[90]

Where data were available, 43% of EIT-supported companies reported more than 10% growth over **the 3-year period** (the last reported year and the 3 years prior).

These results indicate that a part of the portfolio has high potential to surpass the threshold used in European statistics to identify dynamic, fast-growing companies. However, conclusions should be understood not as definitive outcomes, but rather as signals of growth potential within the venture portfolio.[91] Other classifications, such as the FT1000 Europe's Fastest-Growing Companies, use a similar cumulative growth rate as a benchmark. In the 2025 edition of a ranking, a threshold was set as a 3-year compound annual growth rate of 34,8%. Thus, **a considerable fraction of KIC-supported companies would fall into the category of Europe's fastest-growing firms**.[92]

Currently, there are key policy frameworks and initiatives that directly address their growth potential:

- EIC with its blended finance (grants and equity) to SMEs and start-ups, particularly those developing breakthrough or deep-tech solutions (as mentioned above).
- Startup Europe, designed to connect start-ups, scale-ups, investors, and corporates across the EU, reducing fragmentation and helping young innovative firms access cross-border markets.[93]
- Single Market Programme, which focuses on improving conditions for SMEs by reducing administrative burdens, supporting standardisation, and increasing access to funding opportunities.[94]

[89] European Commission. Business dynamics. https://ec.europa.eu/eurostat/cache/htmlpub/key-figures-on-european-business-2022/business_dynamics.html.
[90] European Investment Bank (2023). "EIB Investment Survey 2023 –– European Union Overview". European Investment Bank.; European Investment Bank, Fratto, C., Gatti, M., Kivernyk, A., Sinnott, E. et al., The scale-up gap – Financial market constraints holding back innovative firms in the European Union, European Investment Bank, 2024, https://data.europa.eu/doi/10.2867/382579.
[91] Taking into account the approach undertaken for data gaps, see footnote above.
[92] Financial Times. 2025. FT1000: Europe's Fastest-Growing Companies 2025 ranking. https://www.ft.com/content/cb3e317e-e3cc-4e4a-a506-b755b2f94bb1?.
[93] European Commission. Startup Europe - networking for tech start-ups. https://digital-strategy.ec.europa.eu/en/policies/startup-europe.
[94] European Commission, The Single Market Programme. https://commission.europa.eu/funding-tenders/find-funding/eu-funding-programmes/single-market-programme/overview_en.

- SME Strategy for a Sustainable and Digital Europe, which recognises SMEs as the backbone of the EU economy and explicitly includes scale-ups as key actors for industrial transformation, digitalisation, and the green transition.[95]

Across those programmes, particular emphasis is placed on SMEs, recognised as the backbone of the European economy. Policy measures to strengthen start-ups, scale-ups, and SMEs include improved access to finance, reduced administrative barriers, and targeted support for innovation and internationalisation.[96] Against this backdrop, where EU policy sets the framework and funding priorities, EIT KICs operate closer to the ground, supporting ventures through a combination of education, innovation, and business creation. In this way, **the EIT functions as a bridge between high-level EU policy ambitions and practical implementation, helping to translate strategic objectives into measurable impact, as evidenced by much higher representation of high-growth companies in its portfolio.**

The indicators that appear to be underperforming by the EIT in comparison to other similar programmes are revenue-related. For example, the EIT-supported start-ups have total cumulated revenues of more than EUR 6,28 billion (to be noted, Dealroom and KIC provided data is incomplete), while other accelerators and similar programmes have significantly higher revenues, such as the Abu Dhabi Hub71 (over EUR 1 billion revenue, generated by start-ups for 2024 only)[97] or the US Y Combinator (EUR 48,2 billion generated by start-ups for 2023 only).[98]

Still, it should be emphasised that reporting on the other accelerators and programmes is inconsistent, and it is often difficult to compare their indicators with those of the EIT, as they differ in the reasoning and logic behind them. Also, most accelerators consider only a few indicators to measure impact, such as start-ups supported or revenue generated by start-ups. Thus, an exhaustive and accurate comparison is not possible, and the indicator comparisons above should be interpreted carefully. In addition, the complex and broad function of the EIT puts a lot of focus on social impact, which is generally neglected by typical accelerators, aiming for profit only.

2.2 Employment creation

2.2.1 Approach, data sources and limitations

EIT's impact on employment creation has been established based on seven EIT Impact Framework indicators. Three indicators measure employment, employment growth and sustainability, while four capture KICs' contribution to skills development, career growth, and employment outcomes of supported graduates. The following EIT Impact Framework indicators were considered:

- New jobs created in start-ups/scale-ups.
- Impact on employment growth as a result of the company being engaged with KICs.
- Number and type of jobs in existing businesses sustained through innovations.
- Number and type of skill gaps and/or skill shortages filled by the KIC sector.
- Career growth of participants in EIT-labelled education.

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[95] European Commission. Digital Skills & Jobs Platform. An SME Strategy for a Sustainable and Digital Europe. https://digital-skills-jobs.europa.eu/en/actions/european-initiatives/sme-strategy-sustainable-and-digital-europe.
[96] Eurostat. High-growth enterprises – statistics. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=High-growth_enterprises_-_statistics.
[97] HUB71. Hub71 Records $2.17 Billion in Startup Funding as Abu Dhabi Rises Among Global Tech Hubs. https://www.hub71.com/latest-news/press-release/hub71-records-$2.17-billion-in-startup-funding-as-abu-dhabi-rises-among-global-tech-hubs.
[98] Ycombinator. Congratulations to the 2024 YC Top Companies! https://www.ycombinator.com/blog/yc-top-companies-2024e.

- Students and graduates from EIT-labelled programmes who joined start-ups.
- EIT Label graduates employed.

The first indicator measures the new jobs created by start-ups/scale-ups as a result of KIC support, either through investment or other types of support such as strategic guidance, advice, and capacity building. The second indicator measures the impact on employment growth, expressed as a percentage, and the absolute contribution (in full-time employees) of companies supported by KICs. For these two indicators, Dealroom data served as a primary data source.

The Dealroom database contains data on employees per KIC and per company for the period 2016-2025. However, not all companies supported by the KICs are registered in Dealroom, and data was not available for all registered companies. Data entries are also missing for some years. For example, for one company, data is available for 2017, 2019, and 2023, and for another from 2019 to 2025. For two KICs (EIT Food and EIT Urban Mobility), the Dealroom data were supplemented with additional data provided by the KICs themselves so as to increase the number of companies considered in the analyses.

Table 22 presents the number of companies registered in Dealroom per KIC, the number of companies added to Dealroom in the case of EIT Food and EIT Urban Mobility, and the number of companies for which data are available. It should be noted that a single start-up may be supported by more than one KIC and is therefore included in the analysis for each relevant KIC. The share of the companies for which data are available relative to the total number of companies created and supported by the KICs indicated that only for the EIT Climate-KIC is data available for the majority of companies. For the remaining KICs, less than half of the companies created or supported are represented. As a result, the employment impact of these KICs is likely to be underestimated. This particularly applies to EIT RawMaterials, where only 18% of the supported companies are represented.

Table 22. Data availability on employment in the companies supported by KICs

KIC	# of companies in Dealroom (2025)	# of companies in Dealroom for which data is available	# of additional companies provided by KICs	Total # of companies considered	Total # of companies considered with data available	Share of companies for which data is available*
EIT Climate-KIC	2 410	1 612	0	2 410	1 612	73,0%
EIT Digital	543	475	0	543	475	42,9%
EIT InnoEnergy	314	274	0	311	274	45,1%
EIT Health	1 421	1 195	0	1 421	1 195	50,8%
EIT RawMaterials	186	154	0	186	154	18,0%
EIT Food	190	183	1 369	1 559	738	53,1%
EIT Manufacturing	289	272	0	289	272	25,2%
EIT Urban Mobility	461	430	66	527	496	40,5%
Total	**5 814**	**4 595**	**1 435**	**7 246**	**5 216**	**49,3%**

Source: Ecorys, based on the available data; * to the total number of companies supported by KICs

In addition to the data limitations, there are methodological constraints. Beyond KIC support, the start-ups/scale-ups may have received support from other investors and programmes, making it difficult to isolate the KICs' contribution. As the available data relate to employment level in KIC-supported companies rather than to the

specific contribution of KIC support to job creation, the KIC contribution had to be estimated based on assumptions, as discussed below.

For all indicators, previous evaluations and KIC-reported data were used as additional data sources. The surveys conducted among companies and KIC partners as part of the current study, as well as those conducted under another contract running in parallel for the 7-year assessment of EIT Manufacturing and EIT Urban Mobility, provided additional information to enable establishing the net KIC impact.

The primary source of data on indicators related to skills development and the career growth and employment of EIT graduates is the recent JRC survey of graduates enrolled in EIT education and training. The data was collected in mid-2025 through an online survey among graduates involved in EIT-labelled education and training supported by KICs.

The analyses of the EIT KPIs related to employment creation are presented below. In addition, Annex 2: Economic Impact Analysis methodology lists the indicators and their definitions and data sources and provides more details on the approach to calculating the indicators and associated data and methodological limitations.

2.2.2 New jobs created in start-ups / scale-ups

EIT and its KICs have contributed to substantial job creation in supported start-ups and scale-ups, with employment in these companies rising markedly after KIC support. Across the portfolio, the maximum recorded headcount reached 132 048, and the gap between the minimum and maximum levels was 69 013, indicating that employment in these firms almost doubled over the observed period. This difference is equivalent to around 69 000 additional jobs, while noting that wider market and firm-specific factors also played a role. The strongest employment figures are associated with EIT Climate-KIC, EIT Health, and EIT Digital, suggesting particularly pronounced scale-up dynamics within their supported companies. Most of these jobs are located in EU Non-RIS countries (over 63 000), followed by RIS Countries, with the remaining employment distributed across the rest of the world.

The new jobs created are analysed by KIC and by countries and regions (EU countries, RIS countries, EU non-RIS countries, and other countries) to capture both sectoral impacts in the areas of operation of KICs and geographical impacts.

2.2.2.1 Contribution per KIC

In the period 2010-2024, the KICs altogether created 1144 start-ups and further supported another 9 438 companies. This support has resulted in the creation of new jobs. The reported employees in the companies created or supported by the KICs in the period 2016-2025 are presented in Table 23.

Table 23. Employees in the KICs supported companies in the period 2016-2025

KIC	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
EIT Climate-KIC	49	59	1 475	4 947	6 188	9 954	18 653	22 295	19 139	18 871
EIT Digital	2 717	3 223	6 156	13 659	15 397	14 556	16 644	17 349	10 586	10 266
EIT InnoEnergy	n/a	n/a	166	999	1 644	4 864	9 095	11 816	13 709	12 898
EIT Health	n/a	62	2 488	4 787	8 569	14 172	19 943	21 342	19 927	19 819

EIT RawMaterials	n/a	n/a	77	328	393	735	1 434	2 051	1 744	1 791
EIT Food	0	0	788	1 386	3 261	5 838	8 484	9 820	9 738	11 324
EIT Manufacturing	0	0	0	1 457	1 476	2 339	2 712	3 340	3 381	3 559
EIT Urban Mobility	0	0	0	388	945	2 062	3 777	4 681	4 877	4 305
Total	**2 766**	**3 344**	**11 150**	**27 951**	**37 873**	**54 520**	**80 742**	**92 694**	**83 101**	**82 833**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

The numbers above are based on those companies for which data is available, which represent only about half of the companies created or supported by KICs. Therefore, the employment in the supported start-ups/scale-ups is likely to be underestimated. However, the data clearly shows an overall upward trend in the number of employees in the KIC-supported companies. The lower number of employees in 2024 and 2025 compared to 2023 is likely to stem from the less data available for 2024 and 2025 than for 2023, as shown in Table 24.

Table 24. Number of companies with data available in the years 2023, 2024 and 2025

KIC	2023	2024	2025
EIT Climate-KIC	1 408	1 243	1 192
EIT Digital	413	339	323
EIT InnoEnergy	258	211	203
EIT Health	1 103	1 024	974
EIT RawMaterials	143	122	122
EIT Food	468	443	645
EIT Manufacturing	227	232	226
EIT Urban Mobility	364	383	448
Total	**4 384**	**3 997**	**4 133**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

When data are compared across the KICs, the results suggest that EIT Health, EIT Digital, and EIT Climate-KIC make the highest contribution to employment through the support they provide (Table 25). However, if the missing data are taken into account and the current values extrapolated to full coverage (i.e. 100% data availability), the contribution of EIT InnoEnergy and EIT Food is also likely to be significant.

Table 25. Annual average number of employees in the companies supported by the respective KIC

KIC	Share of companies for which data is available* (%)	Annual average employment supported by KICs (number of employees)	Extrapolated annual average employment (if 100% data was available)
EIT Climate-KIC	72%	10 163	14 198
EIT Digital	49%	11 055	22 623
EIT InnoEnergy	35%	6 899	19 538

EIT Health	49%	12 345	25 083
EIT RawMaterials	18%	1 069	5 852
EIT Food	47%	6 330	13 560
EIT Manufacturing	31%	1 826	5 969
EIT Urban Mobility	42%	2 922	6 957
Total	**43%**	**52 609**	**113 780**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility;
* to the total number of companies supported by KICs

Employment varies between the years. In some companies, employment levels show an upward trend, while for others, they decrease. There are companies that have terminated activities and exited the market. To encompass the employment dynamics, Table 26 presents the maximum employment per company, regardless of the year it was reported. This could indicate the overall KIC's contributions to creating employment in the supported companies, even if, in recent years, some of the jobs were lost.

However, this employment is only partially related to KIC interventions, as the companies alongside the KICs have been supported by other investors as well. The table also provides the difference between the maximum and minimum number of employees, which is another estimate of the KIC's contributions to employment creation, accounting for the existing jobs prior to KIC's intervention, or alternatively, can infer the level of sustainability of the created jobs.

Table 26. Employees in the KICs supported companies

KIC	Maximum number of employees	Difference between max and min number of employees
EIT Climate-KIC	29 915	12 903
EIT Digital	25 722	13 948
EIT InnoEnergy	16 048	9 394
EIT Health	28 472	13 330
EIT RawMaterials	2 531	1 070
EIT Food	17 153	12 536
EIT Manufacturing	5 510	2 272
EIT Urban Mobility	6 697	3 560
Total	**132 048**	**69 013**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

The final and seven-year review reports of the KICs, as well as the KICs' own analyses and data, indicate that KIC support to companies has led to the creation of new jobs (Table 27). The highest is the contribution of EIT InnoEnergy, where 83% of the surveyed start-ups responded that their engagement with the KIC resulted in the creation of at least one new job, followed by EIT Digital at 77%, and EIT Climate-KIC at 59%. These are the first wave KICs. The largest effects on new jobs created by these KICs suggest that their effects on job creation will likely increase over time.

Table 27. Previous studies' findings on job creation

KIC and source	Evidence from previous studies on job creation
EIT Climate-KIC *Final Review of EIT Climate-KIC* *Report, November 2023*	**More than 1 500 new jobs created** No jobs created as a result of KIC support – 41% of respondents of a start-up survey At least 1 new job created – 59% of respondents of start-ups survey, of which: • Between 2-6 jobs created – 50% of the respondents • Between 7 and 15 jobs created – 9% of the respondents
EIT Digital *Final Review of EIT Digital* *Report, November 2023*	**1 500 new jobs created reported** No jobs created as a result of KIC support – 23% of respondents of a start-up survey. At least 2 new jobs created – 26% of respondents of a start-up survey At least 3 new jobs created – 13% of respondents of a start-up survey At least 4 new jobs created – 13% of respondents of a start-up survey At least 5 new jobs created – 6% of respondents of a start-up survey More than 5 new jobs created – 3% of respondents of a start-up survey
EIT InnoEnergy *Final review of EIT InnoEnergy* *Report, November 2023* *EIT InnoEnergy, Impact Report 2022*	**39 112 new jobs created** (*EIT InnoEnergy, Impact Report 2022*) No jobs created as a result of KIC support – 17% of respondents of a start-up survey At least 2 new jobs created – 13% of respondents of a start-up survey Between 3 and 10 new jobs created – 39% of respondents of a start-up survey Between 14 and 76 new jobs created – 28% 4 500 new jobs created – one company – 3%
EIT Health *7-Year Review of EIT Health* *Report, March 2022*	**10 047 new jobs created** No jobs created as a result of KIC support – 50% of respondents of a start-up survey One job created – 17% of respondents of a start-up survey Two jobs created – 17% of respondents of a start-up survey More than 2 jobs created – 16%
EIT RawMaterials *7-Year Review of EIT RawMaterials* *Report, March 2022*	Between 2016 and 2020, the KIC's activities directly resulted in the creation or securing of **1 046,5 jobs**. These do not include indirect jobs created in ventures supported, jobs created within partner organisations as a result of EIT RawMaterials funding
EIT Food *7-year Review of EIT Food, Report, April 2024* *Entrepreneurship Impact report, 2024*	Supported startups created **1 130 jobs**, with **277 of those** jobs fully attributed to EIT Food support in the period 2018-2023 from the three core EIT Food entrepreneurship programmes alone – FAN, RFS and SEED (Entrepreneurship Impact report) No jobs created as a result of KIC support – 58% of respondents of a start-up survey Between 1 and 3 new jobs created – 30% of respondents of a start-up survey Between 4 and 7 new jobs created – 12% of respondents of a start-up survey
EIT Manufacturing *Survey carried out in mid-2025 as part of the 7-year Review of EIT Manufacturing*	**51** estimated jobs created or maintained thanks to KIC support in the period 2021 to 2024 11-20 jobs created or maintained as a result of EIT Manufacturing's support (1 respondent of 34 responses in total) 1-5 jobs created (12 respondents – 35% of responses) No jobs created as a result of KIC support (13 respondents – 38%) Not applicable/I do not know (8 respondents – 24% of responses)
EIT Urban Mobility *Survey carried out in mid-2025 as part of the 7-year Review of EIT Urban Mobility*	**92** estimated jobs created or maintained thanks to KIC support in the period 2021 to 2024 6-10 jobs created or maintained as a result of EIT Urban Mobility's support (1 respondent of 56 responses in total); 1-5 jobs created (28 respondents – 50% of responses) No jobs created as a result of KIC support (27 respondents – 48%)

Source: Ecorys, based on the EIT KIC's reviews

2.2.2.2 Geographical impact

The KICs supported companies in about 100 countries worldwide. **The effects on employment are** strongest **in EU countries, particularly in the EU non-RIS countries**, as shown in Table 28.

Table 28. Employees in the companies supported by KICs by region

Region	Number of countries with companies supported by KICs	Maximum number of employees in companies supported by KICs	Difference between max and min number of employees in companies supported by KICs
EU	28	94 692	50 302
RIS countries	24	39 207	21 013
EU non-RIS countries	11	62 973	35 104
Other countries	61	29 639	16 807

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

Within the regions, there are significant differences. **Within the EU, the KIC's contribution to the creation of new jobs is highest in Germany, France and Sweden;** these are the countries where the KIC-supported companies with the highest number of employees are located. **The contribution is also significant for the Netherlands, Spain and Hungary** (Figure 19).

Figure 19. Total number of employees in companies supported by KICs in EU Member States

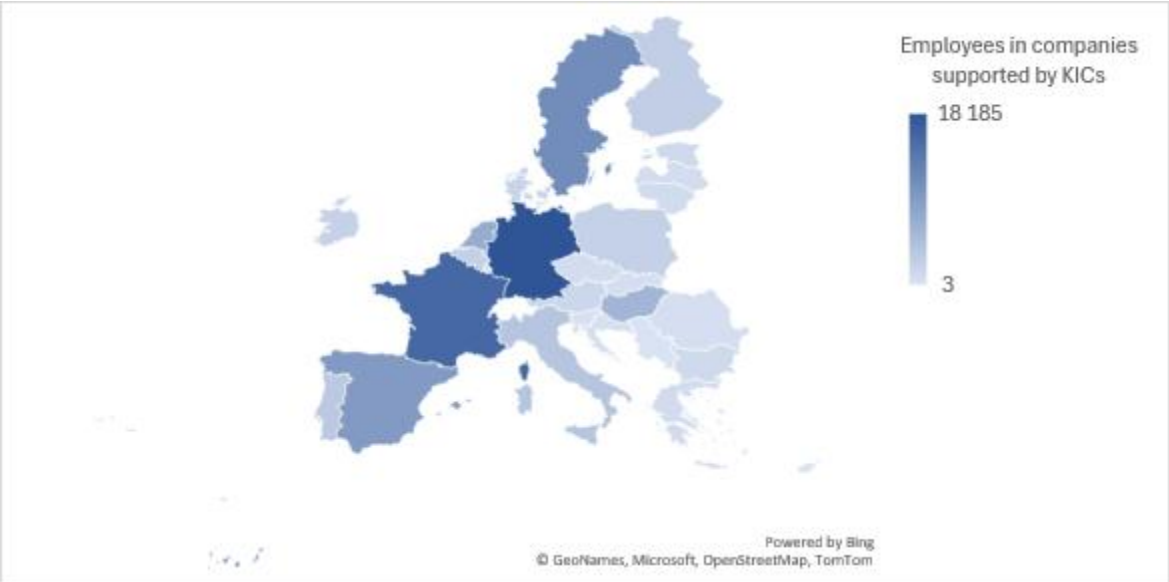


Table 29. Employment in KIC-supported ventures per country

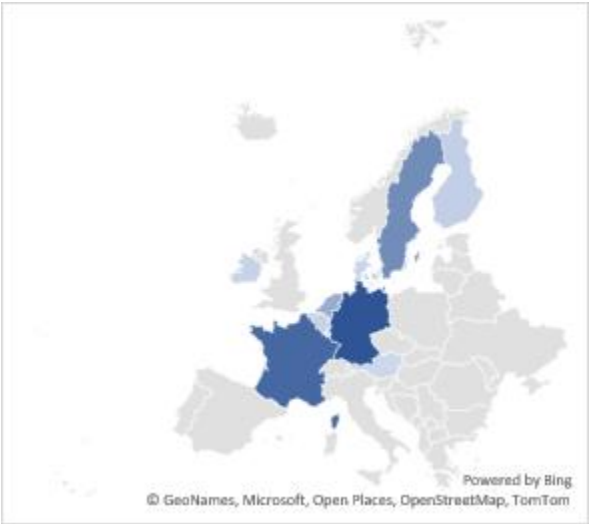
Country	Maximum number of Employees in companies supported by KICs	Country	Maximum number of Employees in companies supported by KICs
Austria	1 583	Italy	3 817
Belgium	2 384	Latvia	728
Bulgaria	1 097	Lithuania	873

Country	Maximum number of Employees in companies supported by KICs	Country	Maximum number of Employees in companies supported by KICs
Croatia	394	Luxembourg	190
Cyprus	95	Malta	39
Czech Republic	738	Netherlands	7 172
Denmark	1 973	Poland	2 190
Estonia	1 149	Portugal	3 358
Finland	2 684	Romania	450
France	15 833	Serbia	3
Germany	17 933	Slovakia	452
Greece	882	Slovenia	380
Hungary	5 805	Spain	9 215
Republic of Ireland	2 202	Sweden	11 088

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

Overall, the effects of KIC support on employment are higher in EU non-RIS countries than in RIS countries, but in some RIS countries (such as Spain, Hungary, and Israel), they are comparable to those in EU non-RIS countries, as seen in Figure 20 and Table 30.

Figure 20. The maximum number of employees in companies supported by KICs in EU non-RIS countries (on the left) and RIS countries (on the right)



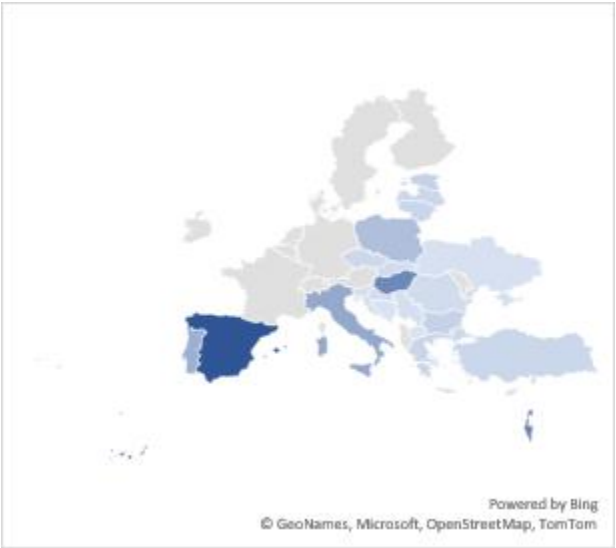


Table 30. Maximum number of employees in companies supported by KICs per country (Europe)

Non-RIS Country	Employees in companies supported by KICs	RIS Country	Employees in companies supported by KICs
Austria	1 583	Bosnia and Herzegovina	5
Belgium	2 384	Bulgaria	1 097
Denmark	1 973	Croatia	394
Finland	2 684	Cyprus	123

Non-RIS Country	Employees in companies supported by KICs	RIS Country	Employees in companies supported by KICs
France	15 833	Czech Republic	738
Germany	17 933	Estonia	1 149
Republic of Ireland	2 202	Greece	882
Luxembourg	190	Hungary	5 805
Netherlands	7 172	Israel	6 298
Sweden	11 088	Italy	3 817
Total	**63 042**	Latvia	728
		Lithuania	838
		Malta	39
		North Macedonia	23
		Poland	2 190
		Portugal	3 358
		Romania	452
		Serbia	293
		Slovakia	452
		Slovenia	380
		Spain	9 215
		Turkey	797
		Ukraine	153
		Total	**39 226**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

KIC support has had a positive impact on employment in companies located in other countries around the world. The greatest effects are in European countries such as the United Kingdom, Switzerland, and Norway, as well as the United States, Japan and India (Figure 21 and Table 31).

Figure 21. The maximum number of employees in companies supported by KICs in non-EU and non-RIS countries

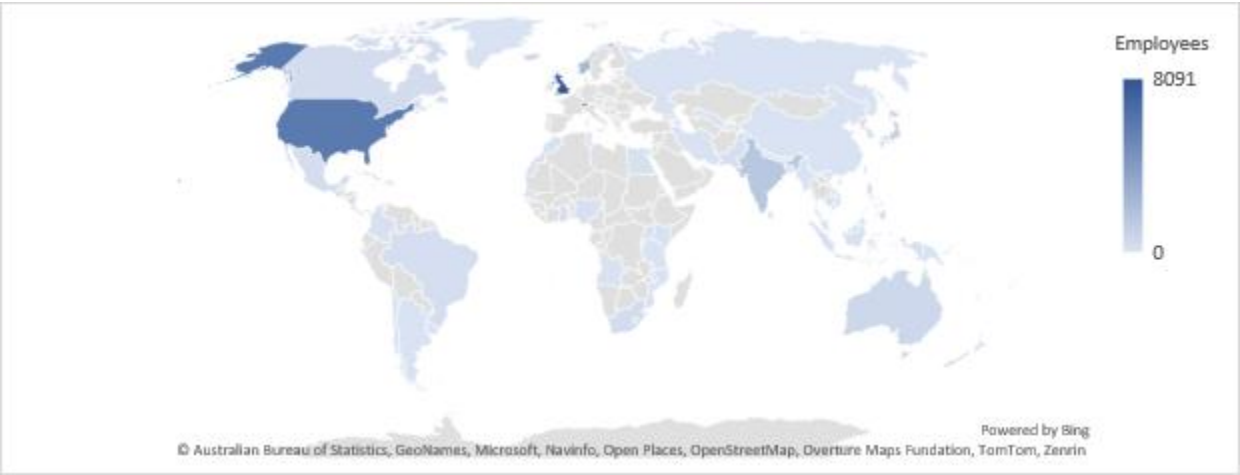


Table 31. The maximum number of employees in companies supported by KICs in non-EU and non-RIS countries

Countries	Employees in companies supported by KICs	Countries	Employees in companies supported by KICs
Angola	4	Moldova	16
Argentina	28	Morocco	45
Armenia	29	Mozambique	20
Australia	618	Nepal	16
Bangladesh	26	New Zealand	4
Barbados	3	Nigeria	93
Bhutan	6	Norway	2 421
Brazil	211	Pakistan	162
Cambodia	37	Papua New Guinea	4
Canada	341	Philippines	635
China	17	Russia	10
Colombia	87	Rwanda	18
Egypt	98	Senegal	6
Ghana	214	Singapore	170
Hong Kong	8	South Africa	338
Iceland	671	South Korea	42
India	1 552	Sri Lanka	39
Indonesia	58	Switzerland	5 896
Iran	1	Tanzania	20
Jamaica	10	Tunisia	12
Japan	1 085	Uganda	43
Kenya	73	United Arab Emirates	1
Malaysia	17	United Kingdom	8 101
Maldives	2	United States	6 043
Mauritius	4	Uruguay	3
Mexico	316	Vietnam	54

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

2.2.3 Impact on employment growth as a result of the company being engaged with KICs

Engagement with EIT KICs is associated with clear and measurable employment growth in supported companies, indicating a positive impact beyond overall headcount expansion. Based on Dealroom data, employment increased by 23 888 FTE after the first year of KIC investment, corresponding to an average increase of 10 FTE per start-up and an overall 39% growth rate in employment. The strongest effects are observed among companies supported by EIT InnoEnergy (+85%) and EIT Climate-KIC (+64%), pointing to particularly strong scaling trajectories in these communities. More than half of all supported companies recorded employment growth following engagement with a KIC. For companies where the exact year of support is unknown, making it impossible to distinguish pre- and post-support dynamics, employment increased by 34% in FTE terms, with 43% of firms reporting growth. These official data are reinforced by survey evidence, in which 11% of respondents report significant employment growth following KIC support and a further 23% indicate moderate growth, corroborating the positive contribution of KIC engagement to job creation and workforce expansion.

As with the previous indicator of new jobs created, the impact on employment growth is analysed per KIC as well as per RIS and non-RIS countries. In addition, the employment growth analysis considers the year in which the respective KIC provided support to the start-up/scale, where such data was available, in order to more precisely account for the contribution of the KICs, considering that other investors also provided support alongside KICs.

2.2.3.1 Contribution per KIC

KIC impacts on employment growth are assessed based on Dealroom data as a percent and absolute (in full-time equivalent FTE) contribution to companies supported by the KICs.

As the indicator also measures the impact on organisations trading or employing innovations (i.e., innovative services, products, technology or business models) developed with KIC support, additional information collected through a survey among KIC partners was added to the analyses.

The Dealroom dataset contains information on the number of employees in each company and the year of investment by the respective KIC. However, where the company was supported by a KIC through other means, the dataset does not indicate when the support was provided. Therefore, two analytical groups have been conducted:

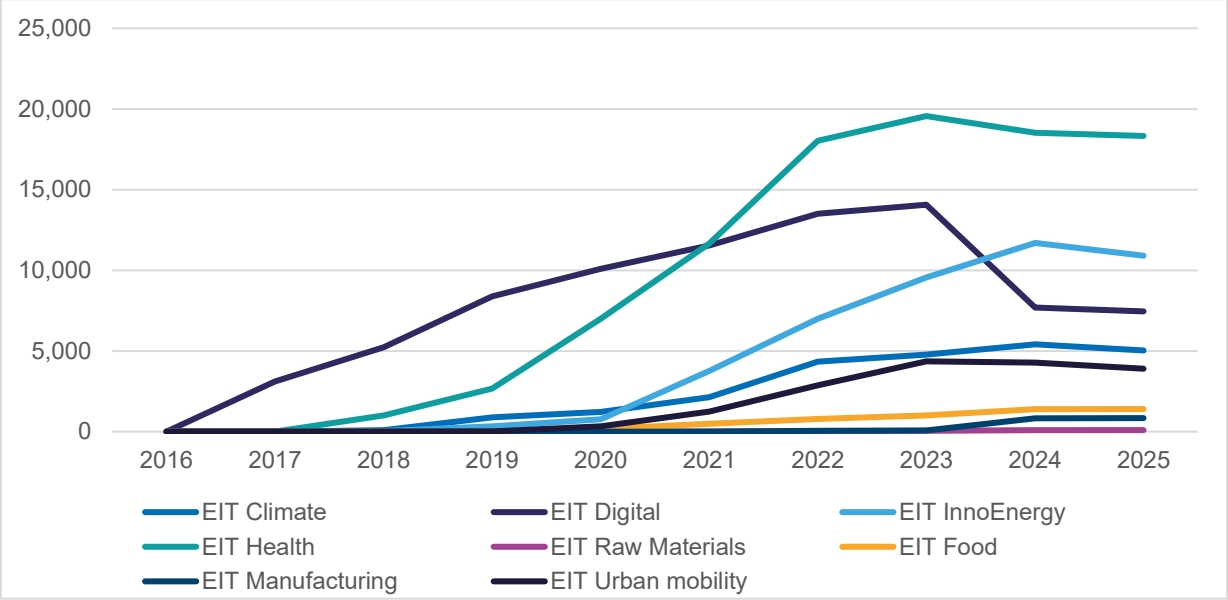
- Analysis on employment growth in companies supported by KICs for which the year in which the support was provided is known.
- Analysis on employment growth in companies supported by KICs for which the year in which the support was provided is not known.

2.2.3.2 Analysis on employment growth in companies supported by KICs for which the year of support is known

To estimate the KIC contribution, the employment growth of each company in which KIC invested was calculated considering the period after the first year of KIC's investment. For example, if we know that EIT Digital first invested in IGenius start-up in 2021, employment data for the years 2021-2025 was considered. If a given start-up shows no growth or a decrease in the number of employees over the years, it is classified as a 'no-growth' start-up, and the employee change is recorded as 0.

Figure 22 presents employees in companies supported by the respective KIC, considering the period after the KIC's first investment.

Figure 22. Employees in companies after KIC's first year of investment in them



Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

The data visualised on the chart is presented in Table 32. Despite fluctuations in employee numbers, a general trend of employment growth following the initial support of a given company by EIT is evident up to 2023. In contrast, the data for 2024 and 2025 indicate a slight decrease. The fluctuations may be attributed to both company-specific and market factors, but may also result from incomplete employment data reporting for some companies and years.

Table 32. Employees in companies after KICs' first year of investment in them

KIC/Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
EIT Climate-KIC	n/a	n/a	95	887	1 223	2 128	4 341	4 767	5 410	5 029
EIT Digital	n/a	3 116	5 221	8 382	10 099	11 547	13 500	14 064	7 687	7 452
EIT InnoEnergy	0	0	33	327	759	3 753	6 999	9 546	11 695	10 904
EIT Health	n/a	n/a	1 006	2 674	6 986	11 662	18 018	19 555	18 517	18 316
EIT RawMaterials	n/a	n/a	n/a	n/a	2	7	41	54	85	96
EIT Food	n/a	n/a	n/a	n/a	172	487	783	1 007	1 395	1 394
EIT Manufacturing	n/a	n/a	n/a	n/a	n/a	n/a	43	70	823	839
EIT Urban Mobility	n/a	n/a	n/a	18	336	1 250	2 877	4 356	4 274	3 908
Total	**0**	**3 116**	**6 355**	**12 288**	**19 577**	**30 834**	**46 602**	**53 419**	**49 886**	**47 938**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

To control for such fluctuations caused by the lack of data, the employment growth in the companies in which KICs invested is calculated as a difference between the first year, when employment numbers were reported, after the KIC's first investment in the start-up, and the last year with reported numbers. For example, while EIT Digital first supported IGenius in 2021, the start-up first reported employment data in 2022 (94 employees) and last reported

in 2025 (216 employees). Therefore, the total growth for this start-up has been calculated as 122 employees. If no growth was observed between the first and last reported years for a given start-up, the total growth has been recorded as 0.

The growth for the entire period after the initial support of a KIC is presented as an absolute number of new employees and as a percentage increase in employees in the last year, with data reported for the first year following the KIC's intervention used as the baseline. Table 33 lists the number of start-ups that reported employment data and presents an average increase in employees per start-up. The percentage increases are strong for EIT InnoEnergy (85%) and EIT Climate-KIC (64%). In absolute terms, the employment increase is highest among the start-ups receiving investments from the EIT Health.

Table 33. Increase of employees in the companies after KIC's first year of investment (in absolute FTE, FTE per start-up, percentage)

KIC	Employee increase (FTE)	Number of start-ups that reported data	Average increase per start-up (FTE)	Employee increase (percentage)
EIT Climate-KIC	2 417	278	9	64%
EIT Digital	5 874	380	15	42%
EIT InnoEnergy	5 646	156	36	85%
EIT Health	8 024	1 185	7	36%
EIT RawMaterials	25	11	2	32%
EIT Food	265	45	6	22%
EIT Manufacturing	87	44	2	9%
EIT Urban Mobility	1 550	336	5	25%
Total	**23 888**	**2 435**	**10**	**39%**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

Growth was unequally distributed across the companies that received support from a KIC. **In 51% of the supported companies (for which the year of KIC's investment is known), employment has increased**. The share of companies with employment growth is highest in the case of EIT RawMaterials (73%) and EIT Climate-KIC (62%). The number of companies with employment growth and their share of the total number of companies supported by the KIC are presented in Table 34.

Table 34. Number and percentage of companies with employment growth (in companies supported by KICs, where the KICs' first year of support is known)

KIC	Number of start-ups with employment growth	Total number of start-ups that reported employment data	Percentage of start-ups with employment growth
EIT Climate-KIC	172	278	62%
EIT Digital	172	380	45%
EIT InnoEnergy	90	156	58%
EIT Health	611	1 185	52%
EIT RawMaterials	8	11	73%
EIT Food	21	45	47%
EIT Manufacturing	20	44	45%
EIT Urban Mobility	142	336	42%

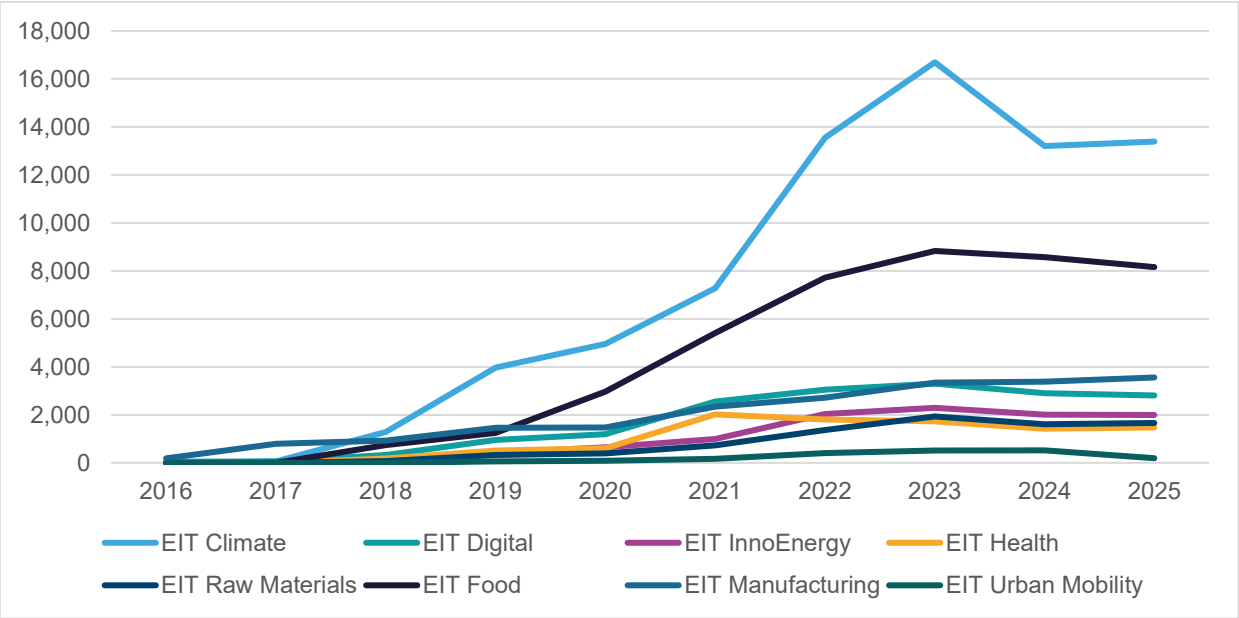
Total	**1 236**	**2 435**	**51%**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

2.2.3.3 Analysis of employment growth in companies supported by KICs for which the year of support is not known

For some companies supported by the EIT KICs, the year of initial support is unknown. In this case, employment growth was calculated since the first year for which data is available (2016). The trends and data are presented in Figure 23 and in Table 35.

Figure 23. Number of employees in companies supported by KICs, where the KICs' first year of support is unknown



Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

Table 35. Number of employees in the companies supported by KICs, where the KICs' first year of support is unknown

KIC/Year	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
EIT Climate-KIC	49	59	1 286	3 975	4 956	7 278	13 556	16 697	13 203	13 390
EIT Digital	0	64	322	955	1 199	2 555	3 046	3 300	2 898	2 813
EIT InnoEnergy	0	0	109	416	649	995	2 037	2 294	2 014	1 994
EIT Health	0	0	180	518	606	2 020	1 815	1 727	1 428	1 477
EIT RawMaterials	n/a	n/a	77	328	394	731	1 363	1 934	1 614	1 667
EIT Food	0	0	745	1 247	2 976	5 408	7 715	8 832	8 574	8 154
EIT Manufacturing	188	796	931	1 457	1 476	2 339	2 712	3 340	3 381	3 559
EIT Urban Mobility	0	0	0	59	94	167	407	515	522	200
Total	**237**	**919**	**3 650**	**8 955**	**12 350**	**21 493**	**32 651**	**38 639**	**33 634**	**33 254**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility. See Section 2.2.1 for data completeness analysis.

The above data shows trends consistent with those observed in the case where the first year of EIT KIC support (investment) is known. A strong overall trend of employment growth over the 2016-2025 period is evident.

The employment growth since 2016, measured in both absolute and percentage terms, in companies, where the first year of EIT KIC's support is unknown, is shown in Table 36. The analysis is based on between the first reported year of employment for each start-up and the most recent year with available employment data within the 2016–2025 period, thereby controlling for the effects of non-reporting. The table also presents the number of companies that reported employment data and the average employment growth per start-up. Overall, **the data reveal strong employment growth over the observed period.**

Table 36. Increase of employees in the companies supported by KICs, where the KICs' first year of support is unknown (in absolute FTE, FTE per start-up, and percentage)

KIC	Employee increase (FTE)	Number of start-ups that reported data	Average increase per start-up	Employee increase (percentage)[99]
EIT Climate-KIC	6 482	1373	4,7	33%
EIT Digital	1 193	97	12,3	42%
EIT InnoEnergy	1 187	119	10,0	58%
EIT Health	174	12	14,5	9%
EIT RawMaterials	752	143	5,3	42%
EIT Food	4 776	682	7,0	39%
EIT Manufacturing	1 200	226	5,3	29%
EIT Urban Mobility	169	78	2,2	23%
Total	**15 933**	**2 730**	**5,8**	**34%***

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility; *Calculated as the percentage change between total employment (FTE) in the last reported year and total employment (FTE) in the year the company received KIC support.

Compared with companies where KIC's first-year investment is known, the average employment growth is slightly lower. However, the differences between the KICs are not particularly prominent. As shown in Table 36, EIT InnoEnergy has the highest employment growth as a percentage (58%). In absolute terms, employment increase is highest in the companies supported by the EIT Climate-KIC (6 482 FTE).

Further insights into employment growth in start-ups for which the KICs' first year of support is unknown are presented in Table 37. Of the supported companies that reported employment data, **43% reported an increase in employment**.

Table 37. Number and percentage of companies with employment growth (in companies supported by KICs, where the KICs' first year of support is unknown)

KIC	Number of start-ups with employment growth	Total number of start-ups that reported employment data	Percentage of start-ups with employment growth
EIT Climate-KIC	539	1 373	39%
EIT Digital	52	97	54%

[99] Calculated as the percentage change between total employment (FTE) in the last reported year and total employment (FTE) in the year the company received KIC support.

EIT InnoEnergy	56	119	47%
EIT Health	8	12	67%
EIT RawMaterials	289	682	42%
EIT Food	109	226	48%
EIT Manufacturing	78	143	55%
EIT Urban Mobility	34	78	44%
Total	**1 165**	**2 730**	**43%**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

The surveys conducted among start-ups supported by KICs also provided information on employment growth. 11% of survey participants report significant growth, and 23% of companies report moderate employment growth (Table 38). The largest number of companies reporting significant and moderate employment growth is among the companies engaged with EIT InnoEnergy, EIT RawMaterials, and EIT Climate-KIC. Minor employment growth is reported only by companies engaged with EIT Manufacturing and EIT Urban Mobility, which is natural, since these are the two newest KICs (among the KICs involved in this impact study) and have the shortest time available for the effects to take place. 15% of respondents indicated that it is still too early to say what the effect on employment will be, while 36% responded that KIC support had no effect on employment at their company.

Table 38. Growth in employment in start-ups after KIC intervention

KIC	Significant growth	Moderate growth	Minor growth	Too early to say	Not sure	No growth	No response	Total responses
EIT Climate-KIC	12%	24%	0%	21%	5%	36%	2%	42
EIT Digital	13%	15%	0%	11%	5%	44%	13%	55
EIT InnoEnergy	36%	36%	0%	9%	0%	18%	0%	11
EIT Health	0%	30%	0%	30%	0%	40%	0%	10
EIT RawMaterials	14%	33%	0%	16%	6%	27%	4%	51
EIT Food	9%	23%	0%	31%	0%	36%	1%	75
EIT Manufacturing	8%	18%	14%	4%	22%	29%	4%	49
EIT Urban Mobility	8%	21%	21%	0%	3%	46%	0%	61
Total	**11%**	**23%**	**6%**	**15%**	**6%**	**36%**	**4%**	**354**

Source: Ecorys, based on a survey among start-ups supported by KICs, as well as surveys carried out in mid-2025 as part of the 7-year assessment of EIT Manufacturing and EIT Urban Mobility

37% of the companies that responded to the survey reported creating 1 to 5 new jobs (Table 39). One company supported by EIT Digital, EIT Food and EIT Manufacturing reported the creation of between 10 and 20 new positions. Another company engaged with EIT InnoEnergy has created more than 20 FTE positions. There are also some companies, in which KIC support resulted in the creation of 5 to 10 new positions (1,7%). Nearly half of the surveyed companies did not answer this question.

Table 39. New full-time-equivalent (FTE) positions opened in start-ups and scale-ups after KIC intervention

KIC	>20	10-20	5-10	1-5	0	No response	Total responses

EIT Climate-KIC	0%	0%	2%	33%	0%	64%	42
EIT Digital	0%	2%	4%	22%	0%	73%	55
EIT InnoEnergy	9%	0%	18%	45%	0%	27%	11
EIT Health	0%	0%	0%	30%	0%	70%	10
EIT RawMaterials	0%	0%	0%	47%	0%	53%	51
EIT Food	0%	1%	0%	29%	0%	69%	75
EIT Manufacturing	0%	2%	0%	41%	3%	54%	49
EIT Urban Mobility	0%	0%	2%	49%	44%	5%	61
Total	**0,3%**	**0,8%**	**1,7%**	**37,0%**	**11,0%**	**49,2%**	**354**

Source: Ecorys, based on a survey among startups supported by KICs, as well as surveys carried out in mid-2025 as part of the 7-year assessment of EIT Manufacturing and EIT Urban Mobility

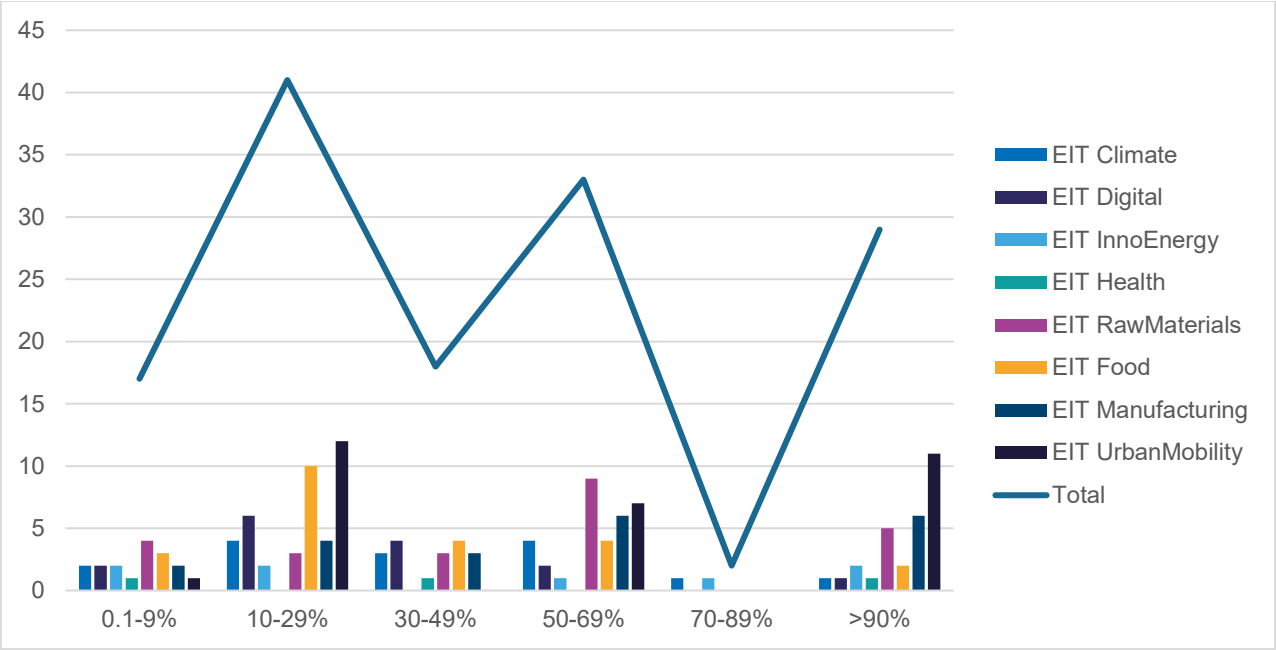
Only 40 of 354 companies have answered the question regarding the percentage of employment increase compared to the organisation's total number of employees before the new employees were hired. On average, these 40 companies report a 47% increase in FTE positions per company.

In addition, we have computed the percentage increase in employment per company based on data collected from questions about the number of employees companies currently have and the number of new employees hired as a result of partnership/engagement with KIC. Since the answers to both questions are not presented as numbers but as ranges, the upper limits of the two ranges have been used to compute the percentage increase.

For example, if a company has 11-50 employees, and has reported 3-5 new employees hired as a result of partnership/engagement with KIC, 50 and 5 are used to compute an increase of 10%. Using this approach, the percentage increase in employment, after KIC intervention, has been calculated for 104 more companies. The average increase is 33%, which is lower than the 47% reported average increase.

Employment data shows that in some companies, **KIC support has contributed to a significant percentage increase in FTEs per company**. The majority of companies (41) report employment increase between 10% and 29%, followed by 50%-69% employment increase (33 companies). 29 companies report more than 90% increase in terms of FTEs, some companies reaching up to 400% increase (a company supported by EIT Digital). 11 of these companies have been supported by EIT Urban Mobility, 6 by EIT Manufacturing and 5 by EIT RawMaterials (Figure 24).

Figure 24. Percentage increase in the number of employees relative to the company's total number of employees before EIT support



Source: Ecorys, based on a survey, as well as surveys carried out in mid-2025 as part of the 7-year assessment of EIT Manufacturing and EIT Urban Mobility

The final and seven-year review reports performed a counterfactual impact assessment of the support to companies in terms of employment growth of four KICs. For three KICs (EIT Climate-KIC, EIT Digital, and EIT Food), the reports conclude that, based on the available data, the supported start-ups are creating significantly more jobs than the control group. This pattern was also observed for EIT InnoEnergy; however, the difference in job creation between supported companies and the control group was not statistically significant. Table 40 presents the estimated employment growth in FTE of the companies supported by the KICs and a control group of companies.

Table 40. Previous studies' findings on employment growth

KIC and source	Average growth of the number of employees per company (persons), 2017-2021
EIT Climate-KIC *Final Review of EIT Climate-KIC Report, November 2023*	Treated group 2,48 Control group 0,22
EIT Digital *Final Review of EIT Digital Report, November 2023*	Treated group 4,57 Control group 0,72
EIT InnoEnergy *Final review of EIT InnoEnergy Report, November 2023*	Treated group 12,41 Control group 0,83
EIT Health *7-Year Review of EIT Health Report, March 2022*	No data
EIT RawMaterials *7-Year Review of EIT RawMaterials*	No data

Report, March 2022	
EIT Food *7-year Review of EIT Food, Final Report, April 2024*	Treated group 3,95 Control group 0,78
EIT Manufacturing *Survey carried out in mid-2025 as part of the 7-year Review of EIT Manufacturing*	Significant growth – 1 respondent of 34 (3%) Moderate growth – 4 respondents of 32 (13%) Minor growth – 7 respondents of 32 (22%) No growth – 12 respondents of 32 (38%) Not applicable/I do not know – 8 respondents of 32 (25%)
EIT Urban Mobility *Survey carried out in mid-2025 as part of the 7-year Review of EIT Urban Mobility*	Major growth – 1 respondent of 56 (1,8%) Significant growth – 3 respondents of 56 (5%) Moderate growth – 12 respondents of 56 (21%) Minor growth – 13 respondents of 56 (23%) No growth – 25 respondents of 32 (45%) Not applicable/I do not know – 2 respondents of 56 (4%)

Source: EIT KICs reviews

2.2.3.4 Geographic Impact

Having calculated the employment growth for start-ups supported by a given KIC, this number was broken down between RIS and non-RIS countries, reflecting geographical impact. Table 41 presents employment growth in RIS and non-RIS countries per KIC, where the first year of support by the KIC is known.

Table 41. Geographical distribution of employment growth in FTE between RIS and Non-RIS countries in the companies supported by KICs, where the KICs' first year of support is known

KIC	RIS (FTE)	Non-RIS (FTE)
EIT Climate-KIC	229	2 188
EIT Digital	3 112	2 762
EIT InnoEnergy	485	5 161
EIT Health	1 697	6 327
EIT RawMaterials	8	17
EIT Food	67	198
EIT Manufacturing	9	74
EIT Urban Mobility	499	1 051
Total	**6 106**	**17 778**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

In addition, Table 42 presents the geographic distribution of employment growth between RIS and Non-RIS countries for companies with an unknown first year of EIT KICs.

Table 42. Geographical distribution of employment growth between RIS and Non-RIS countries in the companies supported by KICs, where the KICs' first year of support is unknown

KIC	RIS (FTE)	Non-RIS (FTE)
EIT Climate-KIC	1 445	5 037
EIT Digital	222	971
EIT InnoEnergy	302	885
EIT Health	53	121

EIT RawMaterials	138	614
EIT Food	1 166	3 610
EIT Manufacturing	643	557
EIT Urban Mobility	97	72
Total	**4 066**	**11 867**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

There is strong positive employment growth across geographies for the 2016-2025 period. Looking at the RIS countries (Figure 25), this growth is most significant in Hungary, Spain, Italy and Portugal.

Figure 25. Employee growth for RIS countries

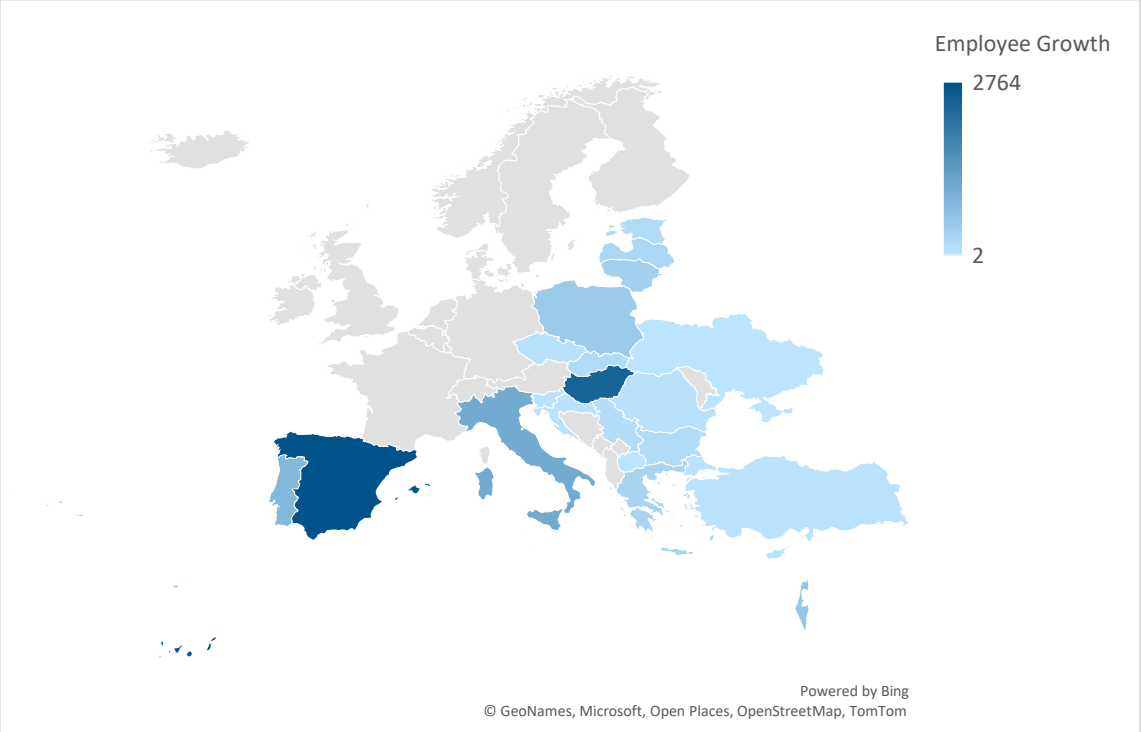


Table 43. Employee growth for RIS countries

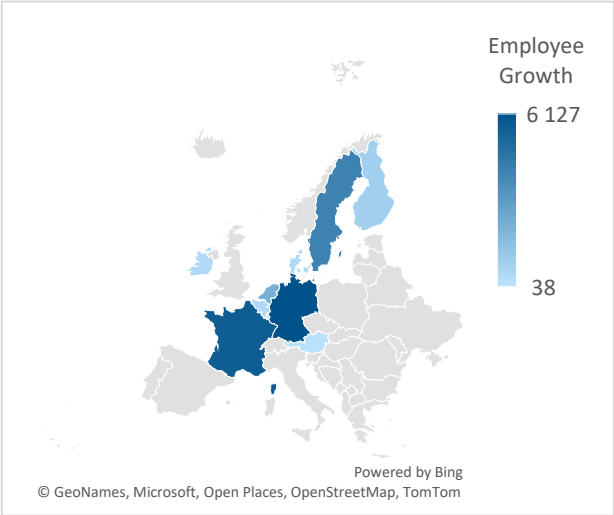
Country	Employee growth in companies supported by KICs	Country	Employee growth in companies supported by KICs
Bulgaria	189	Poland	496
Croatia	72	Portugal	849
Cyprus	35	Romania	72
Czech Republic	101	Serbia	146
Estonia	199	Slovakia	199
Greece	317	Slovenia	63
Hungary	2 458	Spain	2 764
Israel	586	Turkey	65
Italy	1 111	Ukraine	14
Latvia	265	Malta	10
Lithuania	402	North Macedonia	2

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

Employment growth is highest in non-RIS countries in Europe, particularly in France, Germany, Sweden, the Netherlands, and the UK. Figure 26 presents employment growth per non-RIS country in EU Member States (on the left) and other countries (on the right). Furthermore, those results are shown in Table 44, which provides an overview of employee growth in companies supported by EIT KICs in non-RIS countries. The results are presented by country and complemented by a focus on the ten non-RIS countries with the highest employment growth, enabling a comparative assessment of labour market outcomes among supported companies.

Figure 26. Employee growth for non-RIS countries

EU Member States



Other countries

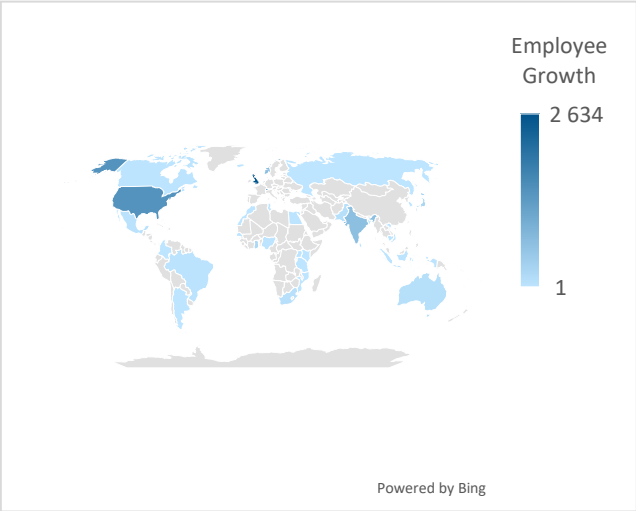


Table 44. Employee growth for non-RIS countries

Country	Employee growth in companies supported by KICs	Country (top ten countries only)	Employee growth in companies supported by KICs
Austria	211	United Kingdom	2 634
Belgium	518	Switzerland	1 732
Denmark	523	United States	1 475
Finland	941	Norway	723
France	5 667	India	679
Germany	6 127	Japan	297
Republic of Ireland	524	Ghana	218
Luxembourg	38	Pakistan	110
Netherlands	2 295	Australia	106
Sweden	4 168	South Africa	91

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility

In addition to Dealroom data, survey information shows that most jobs were created in Europe, both in RIS and non-RIS countries (Table 45). The majority of the companies in RIS countries report between 1-10 new jobs created per company, while the largest share of European non-RIS countries report between 10-20 new jobs

created. This is likely to be driven by market size and access to finance. Among the KIC-supported companies in other countries, only 2 reported opening 1-3 new FTE positions.

Table 45. Number of jobs created in companies in RIS and non-RIS countries.

Number of jobs created	RIS countries	European non-RIS countries	Other countries	No response	Total responses
0	18%	33%	0%	49%	39
1-5	45%	38%	2%	15%	130
5-10	67%	17%	0%	17%	6
10-20	33%	67%	0%	0%	3
>20	0%	100%	0%	0%	1
No response	51%	45%	3%	1%	175
Total	**45%**	**41%**	**2%**	**12%**	**354**

Source: Ecorys, based on survey, as well as surveys carried out in mid-2025 as part of the 7-year Review of EIT Manufacturing and EIT Urban Mobility

2.2.4 Number and type of jobs in existing businesses sustained through innovations

Limited data is available on this indicator. Previous surveys conducted[100] show that the majority of the respondents reported that no jobs have been sustained as a result of their collaboration with the KICs. This is because stakeholders consider that innovations support the creation of new jobs or the process of transforming/upgrading jobs rather than sustaining existing jobs. The data from the previous surveys are shown in Table 46. Data for the fourth wave KICs (EIT Manufacturing and EIT Urban Mobility) is based on surveys conducted in mid-2025 as part of the seven-year assessments of the respective KICs.

Table 46. Jobs sustained reported by the KICs

KIC	Jobs sustained reported	Reporting period
EIT Climate-KIC	227	2016-2022
EIT Digital	52	2016-2022
EIT InnoEnergy	281	2016-2022
EIT Health	59	2016-2021
EIT RawMaterials	148	2015-2021
EIT Food	60	2017-2023
EIT Manufacturing	15	2021-2024
EIT Urban Mobility	68	2021-2024
Total	**910**	

Source: KICs final and seven-year review reports

This indicator is therefore also considered in the light of the overall job sustainability in the companies supported by the KICs.

The Dealroom data indicate that some of the companies supported by the KICs are no longer in operation, resulting in the loss of the employment they had created. Table 47 provides an estimate of the jobs lost due to company

[100] As part of the final and 7-year assessment reports of the KICs.

closures, as well as the number of employees in the most recent year for which data are available. Employees level in the latest reported year could indicate employment sustainability in the companies that are in operation by accounting for potential job losses compared to the maximum level of employment).

Table 47. Jobs lost due to companies no longer being in operation and latest year number of employees in companies supported by KICs

KIC	# of companies no longer in operation (and %)[101]	Employees in the companies no longer in operation (employment lost)	Latest year number employees in companies of operation (sustainable employment)
EIT Climate-KIC	120 (7%)	435	26 348
EIT Digital	35 (7%)	377	19 548
EIT InnoEnergy	18 (7%)	82	13 748
EIT Health	121 (10%)	737	24 456
EIT RawMaterials	5 (3%)	20	2 286
EIT Food	6 (3%)	97	11 352
EIT Manufacturing	3 (1%)	65	4 913
EIT Urban Mobility	10 (3%)	35	5 409
Total	**318 (7%*)**	**1 848**	**108 060**

Source: Ecorys, based on Dealroom data and data provided by EIT Food and EIT Urban Mobility; * Percentage of all the companies with data in Dealroom

2.2.5 Number and type of skill gaps and/or skill shortages filled by KIC sector

This indicator measures the number of KIC partners or employers in the KIC sector reporting reduced skills gaps through the employment of EIT beneficiaries, which includes graduates and trainees, and/or reduced skill shortages in the labour market.

Two aspects of filling skill gaps have been analysed in ventures supported by KICs and in KIC partners:

- Filling skill gaps through employing KIC graduates and trainees.
- Filling skill gaps through participation in KIC-provided education and training.

Analysis shows that EIT KICs play a tangible role in addressing skills gaps and shortages within their respective sectors, strengthening human capital in both ventures and partner organisations. Survey results show that 34% of ventures and 49% of partners report that employing individuals trained by the KICs helped to fill existing skills gaps, with the strongest effects observed for EIT Climate-KIC. In addition, 65% of ventures and 52% of partners indicate that direct participation in KIC-provided education or training contributed to closing skills gaps within their organisations. This impact is particularly pronounced among companies located in RIS countries, highlighting the role of KIC activities in supporting skills development and capacity building where structural skills shortages are often more acute.

Data limitations are related to the low response rate to the skill gaps questions in the surveys, particularly from EIT Health-supported ventures and partners, where only a few responses were collected (see Table 48 below).

[101] Percentage of all the companies with data in Dealroom.

Table 48. Number of responses to Q1: "Has employing individuals trained by the KICs helped to fill skill gaps within your organisation?" and Q2: "Has participation in KIC-provided education or training resulted in filling skill gaps in your organisation?"

KIC	Q1: Employing EIT trainees				Q2: Participation in KIC training			
	Ventures		Partners		Ventures		Partners	
	#	%*	#	%*	#	%*	#	%*
EIT Climate-KIC	7	17%	5	36%	18	43%	4	29%
EIT Digital	9	16%	5	38%	19	35%	6	46%
EIT InnoEnergy	5	45%	7	32%	8	73%	8	36%
EIT Health	2	20%	3	19%	6	60%	6	38%
EIT RawMaterials	6	12%	23	30%	12	24%	27	36%
EIT Food	6	8%	9	25%	36	48%	14	39%
EIT Manufacturing	35	71%	65	87%	40	82%	6	35%
EIT Urban Mobility	57	93%	50	89%	57	93%	10	67%
Total	**127**	**36%**	**167**	**54%**	**196**	**55%**	**81**	**39%**

Source: Ecorys, based on data from surveys among ventures and partners supported by KICs ; *share of total respondents of the respective KIC

2.2.5.1 Filling skill gaps through employing KICs graduates and trainees

36% of the ventures state that individuals trained by KICs, whom they have employed, helped them to fill skill gaps in their companies (see Table 157 in Annex 4). 46% state that employing KIC trainees or graduates did not help them to fill skill gaps. These findings reflect mostly the feedback received from the ventures supported by EIT Manufacturing and EIT Urban Mobility, as they dominate the responses.

The responses for the other KICs are more positive. For example, 71% of the ventures supported by EIT Climate-KIC state that employing individuals trained by the KIC helped them fill skill gaps. However, this share is based on a lower number of responses.

The responses gathered from KIC partners indicate higher satisfaction with filling skill gaps than those from ventures supported by KICs (see Table 158 in Annex 4). 49% of the KIC partners report that they were able to fill skill gaps by employing KIC trainees and graduates. EIT Food and EIT Health partners report the highest satisfaction, although the data is not reliable due to the small number of responses. However, 58% of EIT Manufacturing and 52% of EIT RawMaterials partners (where there are relatively high numbers of responses) also indicate that employing KIC trainees helped them to fill skill gaps in their organisations.

2.2.5.2 Filling skill gaps through participation in KIC-provided education or training

65% of the ventures that responded to this question indicated that their engagement in KIC-provided education and training helped fill skill gaps in their companies. Almost all KICs have significantly contributed to filling companies' skill gaps by engaging them in education and training (Table 49).

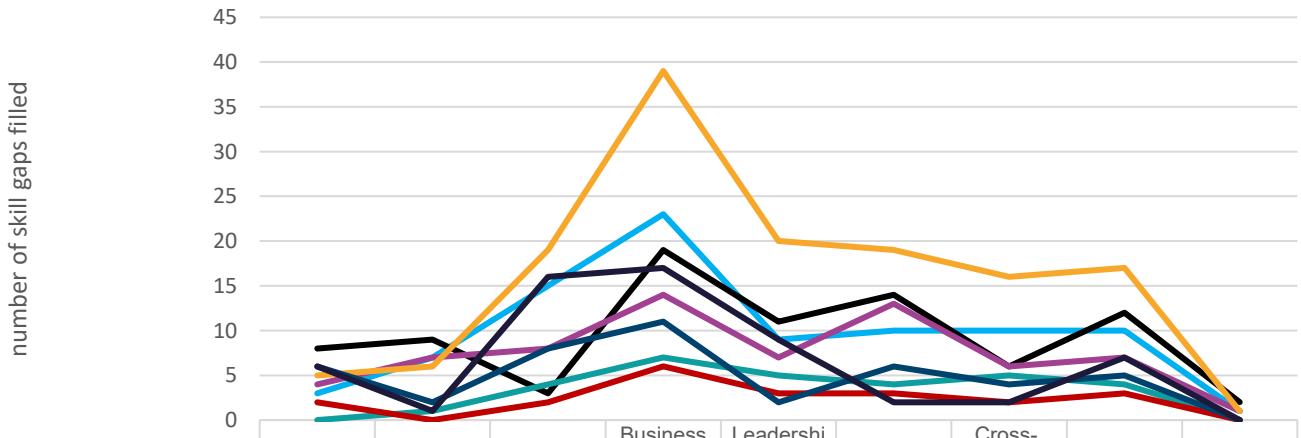
Table 49. Ventures' responses to the question "Has participation in KIC-provided education or training resulted in filling skill gaps in your organisation?"

KIC	Yes	No	Not sure	Total responded
	%	%	%	#
EIT Climate-KIC	78%	17%	6%	18
EIT Digital	63%	21%	16%	19
EIT InnoEnergy	75%	0%	25%	8
EIT Health	67%	17%	17%	6
EIT RawMaterials	83%	8%	8%	12
EIT Food	78%	14%	8%	36
EIT Manufacturing	35%	30%	35%	40
EIT Urban Mobility	70%	26%	4%	57
Total	**65%**	**21%**	**14%**	**196**

Source: Ecorys, based on data from surveys among ventures supported by KICs

The skills most often (25% of responses) filled by KICs' support to ventures are business and entrepreneurial skills (e.g., venture building, business planning, pitching). Sustainability and green skills (e.g., circular economy, energy efficiency, climate impact) were 14% of the responses. Innovation and R&I capabilities (e.g., product design, prototyping) accounted for 13% of the responses. Leadership and management skills were 12% of the responses (Figure 27).

Figure 27. Number of skill gaps filled by ventures engaged in KIC-provided education or training



	Digital	Engineering and technical	Sustainability and green	Business and entrepreneurial	Leadership and management	Innovation	Cross-sector and collaboration	Soft skills	Emerging job profiles
EIT Climate	3	7	15	23	9	10	10	10	1
EIT Digital	8	9	3	19	11	14	6	12	2
EIT InnoEnergy	0	1	4	7	5	4	5	4	0
EIT Health	2	0	2	6	3	3	2	3	0
EIT RawMaterials	4	7	8	14	7	13	6	7	1
EIT Food	5	6	19	39	20	19	16	17	1
EIT Manufacturing	6	2	8	11	2	6	4	5	0
EIT UrbanMobility	6	1	16	17	9	2	2	7	0

Source: Ecorys, based on data from surveys among ventures supported by KICs

52% of KIC partners believe that their involvement in KIC has provided education and training, resulting in the filling of skill gaps in their organisations. The highest contribution is reported by the EIT Food partners

(71%) and the EIT Urban Mobility partners (70%), while none of the 4 EIT Climate-KIC partners that responded to the survey agreed that their participation in KIC-provided education and training has helped them fill skill gaps (Table 50).

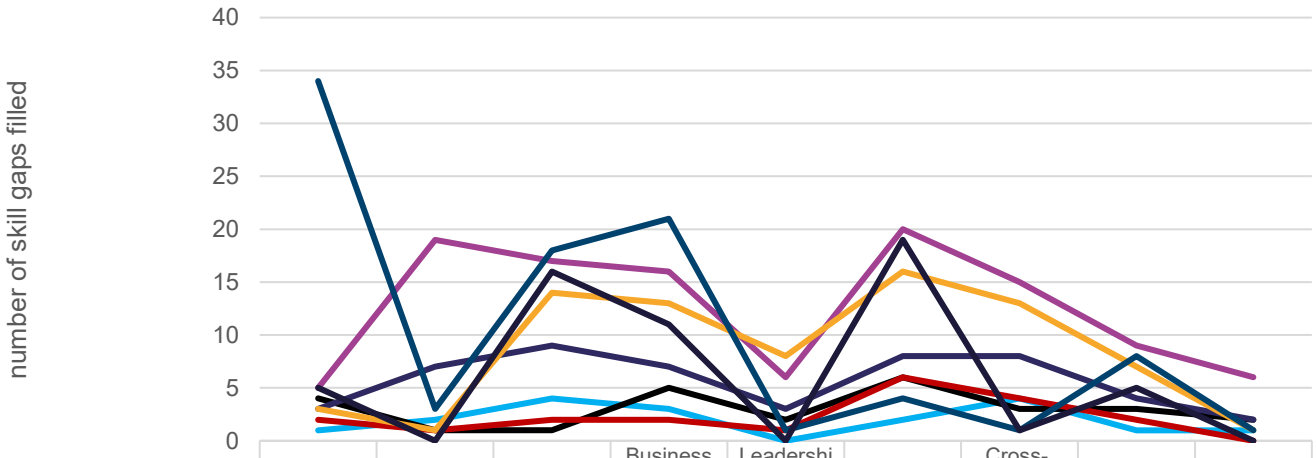
Table 50. KICs' partners' response to the question "Has participation in KIC-provided education or training resulted in filling skill gaps in your organisation?

KIC	Yes	No	Not sure	Total responded
	%	%	%	#
EIT Climate-KIC	0%	50%	50%	4
EIT Digital	50%	33%	17%	6
EIT InnoEnergy	50%	25%	25%	8
EIT Health	50%	17%	33%	6
EIT RawMaterials	48%	26%	26%	27
EIT Food	71%	0%	29%	14
EIT Manufacturing	33%	33%	33%	6
EIT Urban Mobility	70%	20%	10%	10
Total	**52%**	**22%**	**26%**	**81**

Source: Ecorys, based on data from surveys among KICs' partners

The skills that KIC partners most often filled (18% of the responses each) through engaging in KIC-provided education or training are: innovation and R&I capabilities, and sustainability and green skills (e.g., circular economy, energy efficiency, climate impact). Business and entrepreneurial skills (e.g., venture building, business planning, pitching) were 17% of the responses. However, there are variations among KICs, as shown in the Figure below. For example, EIT Manufacturing partners report high satisfaction with the KIC's contribution to filling digital skills, and EIT RawMaterials reports high satisfaction with the KIC's contribution to filling engineering, technical, and innovation skills (Figure 28).

Figure 28. Number of skill gaps filled by KIC partners engaged in KIC-provided education or training



	Digital	Engineering and techical	Sustainability and green	Business and entrepreneurial	Leadership and management	Innovation	Cross-sector and collaboration	Soft skills	Emerging job profiles
EIT Climate	1	2	4	3	0	2	4	1	1
EIT Digital	4	1	1	5	2	6	3	3	2
EIT InnoEnergy	3	7	9	7	3	8	8	4	2
EIT Health	2	1	2	2	1	6	4	2	0
EIT RawMaterials	5	19	17	16	6	20	15	9	6
EIT Food	3	1	14	13	8	16	13	7	1
EIT Manufacturing	34	3	18	21	1	4	1	8	1
EIT UrbanMobility	5	0	16	11	0	19	1	5	0

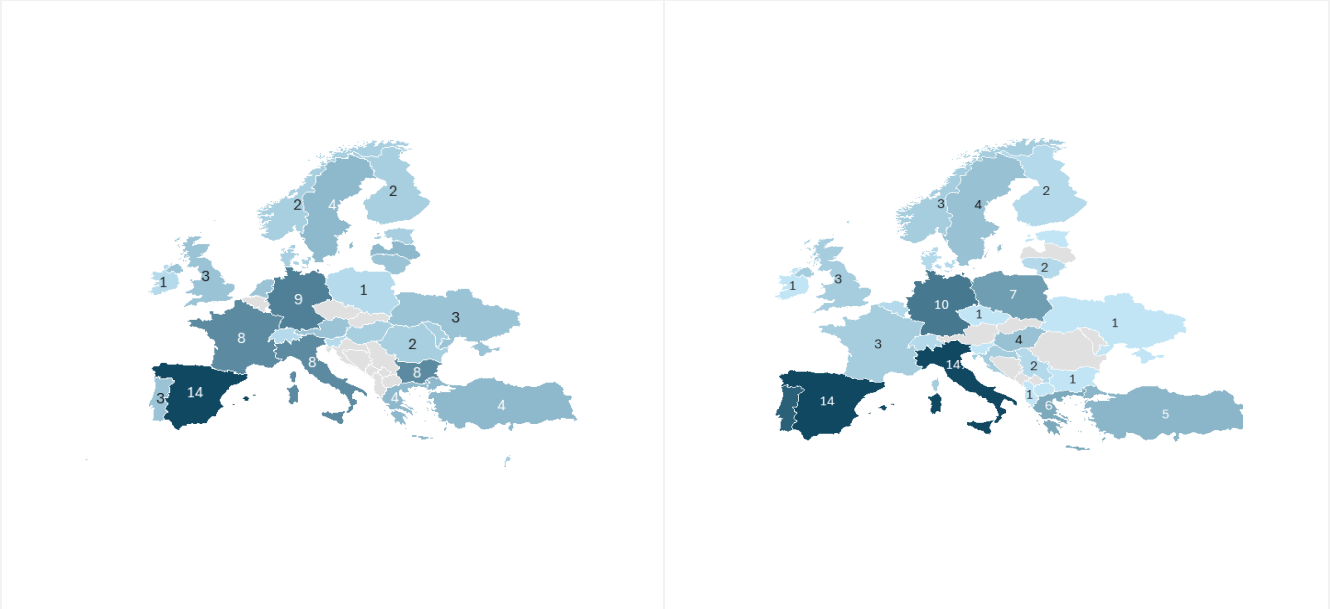
Source: Ecorys, based on data from surveys among KICs' partners

In addition to the surveys conducted, interviews that were carried out with the EC staff reveal that the KICs' input in filling skill gaps is valuable because of their close links with industry, ensuring that the training meets real market needs. KICs initiatives have the potential to become financially self-sustaining, since industry co-invests. The KICs are helping to fill skills gaps, particularly in net-zero sectors (green energy, raw materials, etc.), and they address the uneven mobility of skills across Europe. KIC has a central role in the implementation of the net-zero industry academies. The Battery Academy, Solar Academy, RawMaterials Academy were mentioned as good examples of KICs contributing to filling skill gaps.

2.2.5.3 Geographical impact

The ventures that report filling skill gaps in their companies through the employment of KIC graduates or trainees, or through KIC-provided education and training, span Europe and beyond. Two companies from Brazil and one from Colombia report filling skill gaps. KIC partners that report skill gaps being filled through their engagement in KICs' training and education are mostly located in Spain and Italy, as well as in Portugal and Germany (Figure 29 and Table 51).

Figure 29. Number of ventures (on the left) and KIC partners (on the right) that have reported skill gaps being filled thanks to employing KIC graduates or trainees and/or thanks to engagement in KIC education and training



Source: Ecorys, based on data from surveys among ventures and partners supported by KICs

Table 51. Ventures and KIC partners that reported skill gaps being filled thanks to employing KICs' graduates or trainees and/or thanks to engagement in KICs' education and training

Country	# of ventures that have reported skill gaps being filled*	Country	# of KIC partners that report skill gaps being filled
Austria	3	Albania	1
Bulgaria	8	Belgium	2
Denmark	2	Bulgaria	1
Estonia	2	Croatia	3
Finland	2	Czech Republic	1
France	8	Denmark	2
Germany	9	Estonia	1
Greece	4	Finland	2
Hungary	2	France	3
Ireland	1	Germany	10
Israel	2	Greece	6
Italy	8	Hungary	4
Latvia	4	Ireland	1
Lithuania	3	Italy	14
Moldova	2	Lithuania	2
Netherlands	3	North Macedonia	1
Norway	2	Norway	3
Poland	1	Poland	7
Portugal	3	Portugal	12
Romania	2	Serbia	2
Slovenia	1	Slovenia	1
Spain	14	Spain	14

Sweden	4	Sweden	4
Switzerland	1	Switzerland	2
Turkey	4	Türkiye	5
Ukraine	3	Ukraine	1
United Kingdom	3	United Kingdom	3
Brazil	2	**Total**	**108**
Colombia	1		
Total	**104**		

Source: Ecorys, based on data from surveys among ventures and partners supported by KICs

62% of supported ventures and 70% of partners who report having skill gaps filled are located in RIS countries (Table 52).

Table 52. Ventures and KIC partners in RIS and non-RIS countries that reported skill gaps being filled thanks to employing KICs graduates or trainees and/or thanks to engagement in KICs education and training

Non-RIS countries		RIS counties	
Ventures	Partners	Ventures	Partners
38 (38%)	32 (30%)	63 (62%)	76 (70%)

Source: Ecorys, based on data from surveys among ventures and partners supported by KICs

2.2.6 Career growth of participants in EIT-labelled education

Participation in EIT-labelled education programmes is strongly associated with positive career and income outcomes for graduates, indicating a meaningful contribution to individual skills development and professional advancement. According to survey results, **66% of graduates report that the EIT-labelled programme helped them develop skills to an "extremely" or "very" high extent**, notwithstanding the broad wording of the survey question. Beyond skills acquisition, the programmes are also linked to tangible economic benefits, as **21% of respondents indicate an increase in their annual net income following participation in EIT-supported education and training**. Together, these findings suggest that EIT-labelled education supports both employability-relevant skill development and upward career trajectories.

Career growth is measured by progress in job grade/level, satisfaction with work, impact contributions, and increases in salary/work conditions. The analyses are based on data provided by the JRC, collected as part of their study, which has not yet been published.[102] The data were collected in mid-2025 through an online survey among graduates of EIT-labelled master's and doctoral programmes. Career growth was measured through the following data, collected through the survey:

- Participants in EIT-labelled education have improved educational levels.
- Satisfaction with the impact of the EIT-labelled programmes in terms of developing skills, networking, or support needed for entrepreneurship and innovation.
- Annual net income increase of the EIT-labelled graduates.

Limitations include the low survey response rate. 297 responses were received, of which 257 are related to the EIT-labelled programmes.

[102] Data that was not published during the preparation of the report, i.e. January 2026

2.2.6.1 Contribution per KIC

Participants in EIT-labelled education with an improved educational level

Of 297 respondents to the JRC survey among graduates of KIC-supported education and training, 257 were involved in EIT-labelled programmes. 78 (30%) of those completed a higher level of education than the one they already had, as presented in Table 53. The majority of them (72) earned a Master's (or equivalent) degree, and 6 completed a Doctorate/PhD or equivalent study. Most of the graduates who improved their educational level were supported by EIT InnoEnergy, followed by EIT Digital and EIT RawMaterials. Most doctoral levels were completed with the support of EIT Urban Mobility.

Table 53. Number of respondents – KIC-supported graduates – who have improved their education level through EIT-labelled education

KIC	From Bachelor's Degree (or equivalent) to Master's Degree (or equivalent)	From Master's Degree (or equivalent) to Doctorate/PhD (or equivalent)	Total
EIT Climate-KIC	2	1	3
EIT Digital	13	0	13
EIT InnoEnergy	26	1	27
EIT Health	4	0	4
EIT RawMaterials	11	0	11
EIT Food	7	0	7
EIT Manufacturing	8	0	8
EIT Urban Mobility	1	4	5
Total	**72**	**6**	**78**

Source: Ecorys, based on the JRC survey data

2.2.6.2 Satisfaction with the impact of the EIT-labelled programmes

EIT programme graduates who responded to the survey generally express high satisfaction with the programmes. **66% state that the EIT-labelled programmes have extremely or very much helped them develop skills, build networks, or receive the support needed for entrepreneurship and innovation.** The biggest is the satisfaction from the EIT Urban Mobility (75% of respondents are extremely or very satisfied), EIT Food (70%), EIT Digital (69%), EIT InnoEnergy (68%) and EIT RawMaterials (67%). Detailed data and response distributions are presented in Table 54.

Table 54. EIT programmes graduates' responses to the question: "Overall, to what extent did the EIT labelled programme help you develop the skills, network, or support needed for entrepreneurship and innovation" in %

KIC	Extremely	Very	Moderately	Slightly	Not at all	Total respondents
EIT Climate-KIC	11%	33%	33%	11%	11%	**9**
EIT Digital	25%	44%	28%	3%	0%	**32**
EIT InnoEnergy	21%	47%	25%	7%	0%	**96**
EIT Health	10%	30%	40%	0%	20%	**10**
EIT RawMaterials	23%	44%	21%	8%	4%	**48**

EIT Food	20%	50%	17%	10%	3%	**30**
EIT Manufacturing	23%	41%	36%	0%	0%	**22**
EIT Urban Mobility	33%	42%	8%	17%	0%	**12**
Total	**22%**	**44%**	**25%**	**7%**	**2%**	**259***

Source: Ecorys, based on the JRC survey data; * two graduates indicated that they have been engaged in an EIT-labelled programme of more than one KIC

Most respondents completed Master's studies (73%), 24% were involved in other studies, and only 4% were attending Bachelor's (2%) or PhD studies (2%).

Table 55. Degree obtained by the EIT programme graduates' and their responses to the question: "Overall, to what extent did the EIT labelled programme help you develop the skills, network, or support needed for entrepreneurship and innovation?"

Degree obtained	Extremely	Very	Moderately	Slightly	Not at all	Total respondents
Bachelor's Degree	25%	50%	25%	0%	0%	**4**
Master's Degree	23%	43%	25%	6%	3%	**187**
PhD Degree	17%	33%	33%	17%	0%	**6**
Other	18%	50%	22%	8%	2%	**62**
Total (%)	**22%**	**44%**	**25%**	**7%**	**2%**	**100%**

Source: Ecorys, based on the JRC survey data

The feedback provided by graduates of EIT-labelled programmes to open questions indicates that the EIT-labelled Master's and PhD programmes are widely praised for their networking opportunities, interdisciplinary learning, and career impact. Many alumni describe them as *life-changing*, boosting technical, entrepreneurial, and soft skills, while opening doors to international careers and start-ups. Mobility between universities and the multicultural environment were also identified by most participants as additional benefits of the EIT-labelled educational programmes.

2.2.6.3 Annual net income increase of the EIT-labelled graduates

Engagement in EIT-labelled programmes positively impacted career growth and led to a 21% increase in the annual net income of graduates (Table 56). Most of these graduates enrolled in EIT InnoEnergy, EIT Digital and EIT Climate-KIC programmes. No graduates reported an income increase after completing EIT Urban Mobility programmes, which could be explained by the lifespan of this KIC (one of the two youngest KICs in this impact study).

Table 56. Share of graduates of EIT-labelled programmes that report an increase in their annual net income

KIC	Annual net income increase reported	No increase in the annual net income reported	Total #
EIT Climate-KIC	33%	67%	9
EIT Digital	31%	69%	32
EIT InnoEnergy	36%	64%	96
EIT Health	10%	90%	10
EIT RawMaterials	4%	96%	48

EIT Food	7%	93%	30
EIT Manufacturing	9%	91%	22
EIT Urban Mobility	0%	100%	12
Total	**21%**	**79%**	**259***

Source: Ecorys, based on the JRC survey data; * two graduates indicated that they have been engaged in an EIT labelled programme of more than one KIC

The share of PhD and Master's degree graduates who report an annual net income increase is almost equal, 23% and 22% respectively, as shown in the table below.

Table 57. Share of graduates of EIT-labelled programmes that report an increase in their annual net income by degree obtained

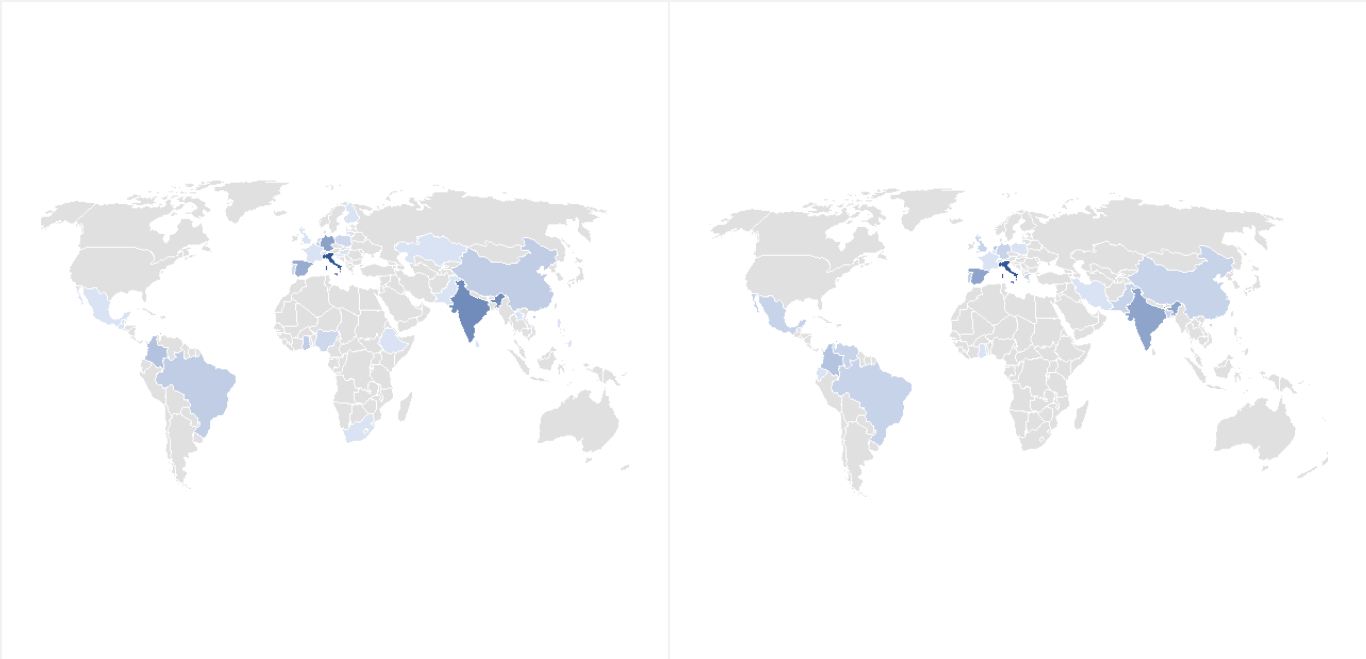
Degree	Annual net income increase reported	No increase in the annual net income reported	Total #
Master's degree	22%	78%	228
PhD degree	23%	77%	22

Source: Ecorys, based on the JRC survey data

2.2.6.4 Geographical impact

EIT-labelled programmes graduates who have improved their educational level, or report an increase in their annual net income, come from around the world. Most of these graduates originate from Italy, Spain, Germany and India (Figure 30 and Table 58).

Figure 30. Geographical concentration of graduates in EIT-labelled programmes that obtained a higher level of education (on the left) or report an increase in their annual net income after completing EIT-labelled education (on the right)



Source: Ecorys, based on JRC survey data

Table 58. Number of graduates in the EIT-labelled programme per country who obtained a higher level of education or report an increase in their annual net income after completing EIT-labelled education

Country	# of graduates who obtained a higher level of education in EIT labelled programmes	Country	# of graduates who report an increase in the annual net income
Belgium	3	Bangladesh	2
Brazil	3	Belgium	1
Brunei	1	Brazil	2
China	3	Brunei	1
Colombia	4	China	2
Croatia	1	Colombia	3
Ethiopia	1	Ecuador	1
Finland	1	France	1
France	1	Germany	2
Germany	7	Ghana	1
Ghana	3	Greece	2
Guatemala	1	India	5
Hungary	1	Iran	1
India	9	Italy	10
Italy	14	Mexico	2
Kazakhstan	1	Montenegro	1
Laos	1	Netherlands	3
Lithuania	1	Pakistan	2
Mexico	1	Poland	1
Netherlands	2	Portugal	2
Nigeria	2	Spain	5
Pakistan	1	Switzerland	1
Philippines	1	United Kingdom	2
Poland	2	Venezuela	2
Portugal	2	**Total**	**55**
Singapore	1		
South Africa	1		
Spain	6		
Sri Lanka	1		
Switzerland	1		
United Kingdom	1		
Total	**78**		

Source: Ecorys, based on the JRC survey data

As presented in Table 59, the impact of EIT-labelled programmes on improving educational level and career growth is particularly visible in the case of RIS countries and non-European nationals.

Table 59. Graduates originating from RIS, non-RIS countries and other countries that reported obtaining a higher level of education or an increase in their annual net income after completing EIT-labelled education

	Non-RIS countries	RIS counties	Other countries
EIT graduates who obtained a higher level of education	16 (21%)	27 (35%)	35 (45%)
EIT graduates who report an increase in the annual net income	10 (18%)	21 (38%)	24 (44%)

Source: Ecorys, based on the JRC survey data

2.2.7 Students and graduates from EIT-labelled programmes who joined start-ups

EIT-labelled education programmes contribute to entrepreneurial and innovation-oriented career paths, translating acquired skills into concrete market activities. Survey results, presented in Table 60, show that 8,4% of respondents went on to create their own start-up after completing an EIT-labelled programme, while a further 16,8% subsequently joined a start-up, indicating a strong orientation towards entrepreneurial ecosystems. Beyond start-up formation and employment, 21,6% of graduates report that they launched an innovation following the programme, underscoring the role of EIT-labelled education in fostering both entrepreneurial engagement and innovation uptake among students and graduates.

This indicator measures the number of students and graduates from EIT-labelled programmes who joined start-ups after graduation or during the programme. It also considers, in particular, MSc and PhD Label graduates who joined start-ups within 3 years of graduation. The data are derived from responses to the survey conducted by the JRC.

Data limitations stem from the low number of survey responses. Information on the country of origin of start-ups is not available. Therefore, when discussing geographical impact, data on the country of study and on the country of origin of alumni were used instead.

2.2.7.1 Contribution per KIC

Of 297 respondents, 75 responded that **they have either joined or founded their own start-up after completing an EIT-labelled programme** (**25,2% of the total respondents**). In absolute terms, EIT InnoEnergy stands out with the most graduates who either joined or created a start-up after graduation (25 respondents), while the EIT Climate-KIC shows the highest ratio of positive answers to the total answers of the respondents who have enrolled in an EIT Climate-KIC programme (75%), although with low credibility due to the relatively lower number of responses (Table 60).

Table 60. Number of students who joined or created their own start-ups following their graduation from an EIT-labelled programme (per KIC)

KIC	Have you joined a start-up following your participation in an EIT-labelled programme?		
	Yes, I created my start-up after an EIT-labelled programme	Yes, I joined a start-up after an EIT-labelled programme	TOTAL respondents
EIT Climate-KIC	37,5%	37,5%	8
EIT Digital	16,1%	35,5%	31
EIT InnoEnergy	5,3%	23,2%	95
EIT Health	11,1%	33,3%	9

EIT RawMaterials	8,3%	8,3%	48
EIT Food	3,3%	10,0%	30
EIT Manufacturing	4,5%	9,1%	22
EIT Urban Mobility	16,7%	0,0%	12
Multiple KICs	0,0%	0,0%	2
KIC not indicated	7,5%	5,0%	40
Total	**8,4%**	**16,8%**	**297**

Source: Ecorys, based on the JRC survey data

Some of the respondents who answered that they had not joined or created a start-up following their participation in an EIT-labelled programme, answered that they launched an innovation either as part of their own business or as part of an already existing company/organisation. A plausible interpretation is that these respondents have enrolled in an EIT-labelled programme while already working in the company or after founding a new one.

Nevertheless, these students have applied their newly acquired knowledge and experience in the further development of the respective company. Therefore, it is relevant to discuss the respondents who answered "no" to the question "Have you joined a start-up following your participation in an EIT-labelled programme?" but responded positively to the question "Have you launched any innovation (product, service, or technology) to the market, either independently or within an organisation?".

Forty-eight respondents have not created or joined a start-up but launched an innovation after EIT-labelled programme graduation as part of an existing company (38) or as part of their own startup (10) (Table 61).

Table 61. Number of students who launched an innovation within an already existing company or their own start-up after/during an EIT labelled programme (per KIC)

KIC	Have you launched any innovation (product, service, or technology) to the market, either independently or within an organisation?			
	Yes, within an existing company or organisation	Yes, as part of my own startup/business	Both	TOTAL respondents
EIT Climate-KIC	50%	0,0%	0,0%	2
EIT Digital	40%	6,7%	0,0%	15
EIT InnoEnergy	17,6%	0,0%	1,5%	68
EIT Health	20%	20%	0,0%	5
EIT RawMaterials	17,5%	2,5%	0,0%	40
EIT Food	15,4%	7,7%	0,0%	26
EIT Manufacturing	5,3%	0,0%	0,0%	19
EIT Urban Mobility	20%	10,0%	10%	10
Multiple KICs	50%	0,0%	0,0%	2
KIC not indicated	8,6%	11,4%	0,0%	35
Total	**17,1%**	**4,5%**	**0,9%**	**222**

Source: Ecorys, based on the JRC survey data

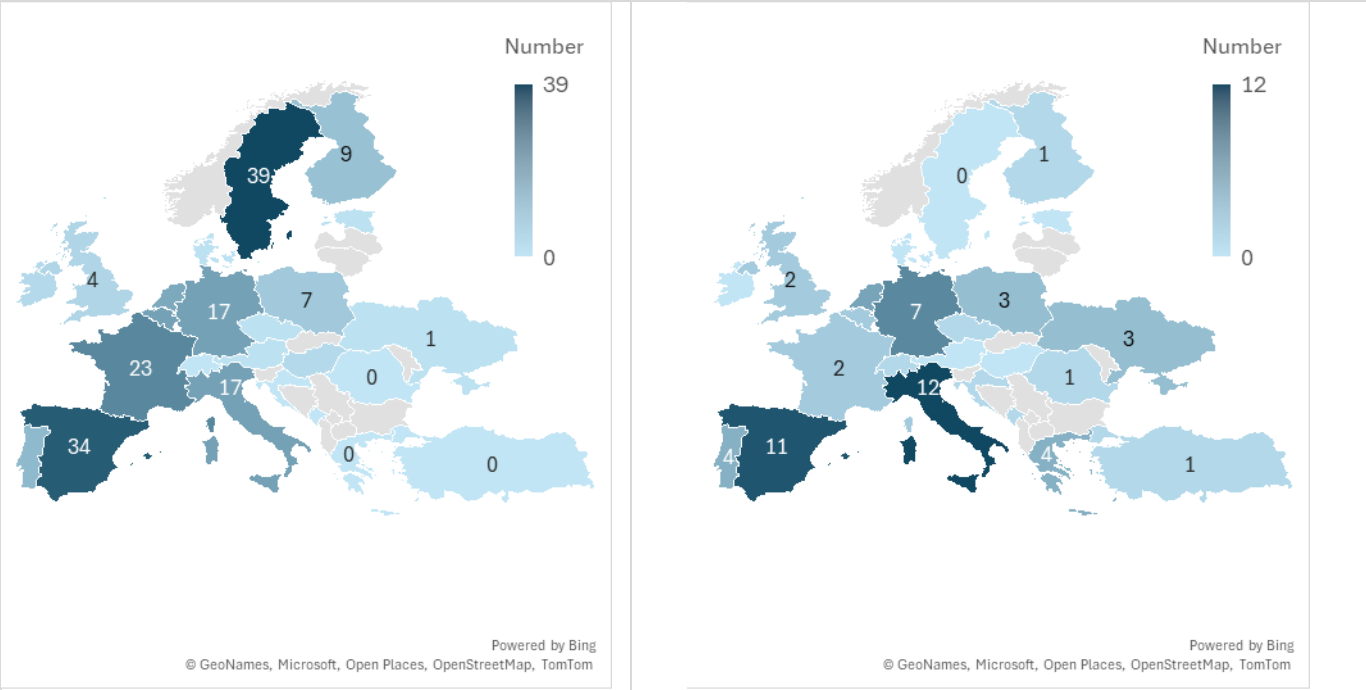
2.2.7.2 Geographical impact

We explored the geographical distribution of the students who answered positively to either one of the questions: “Have you joined or created a start-up following your participation in an EIT-labelled programme?” and “Have you launched any innovation (product, service, or technology) to the market, either independently or within an organisation?”. As data on the country of registration of the start-up was not available, the analysis considers both the country of study and the country of origin of alumni.

Some students have listed more than one country of origin of the EIT-labelled programmes (they have either enrolled in more than one programme or have enrolled in a joint programme). In such cases, each country has been recorded, and thus, the number of countries is higher than the number of responses (204 country records with 125 respondents).

Most students who created or joined a start-up after graduation from an EIT-labelled programme have studied in Sweden (Figure 31). Most students who did not create or join a start-up followed the EIT-labelled programme, have launched an innovation within an already existing company or their own start-up and have studied in Spain (16 graduates). **Over 37% of the graduates who answered positively to either one of the questions have studied in RIS countries** (Table 62).

Figure 31. Number of students who joined or created their own start-ups following their graduation from an EIT labelled programme, and students who launched an innovation within an already existing company or their own start-up after/during an EIT labelled programme – at the country of study (on the left) and the country of origin (on the right)



Source: Ecorys, based on the JRC survey data

Table 62. Number of students who joined or created their own start-ups following their graduation from an EIT labelled programme, and students who launched an innovation within an already existing company or their own start-up after/during an EIT labelled programme

RIS countries		
Country	Graduates per country of study	Graduates per country of origin

	Joined or created a startup	Launched an innovation within a company	Total	Joined or created a startup	Launched an innovation within a company	Total
Croatia	0	0	0	1	0	1
Czech Republic	1	0	1	1	0	1
Estonia	1	0	1	0	0	0
Greece	0	0	0	2	2	4
Hungary	2	1	3	0	0	0
Italy	8	9	17	8	4	12
Montenegro	0	0	0	1	0	1
Poland	2	5	7	2	1	3
Portugal	9	2	11	0	4	4
Romania	0	0	0	0	1	1
Spain	18	16	34	7	4	11
Turkey	0	0	0	0	1	1
Ukraine	1	0	1	2	1	3
Total	**42**	**33**	**75**	**24**	**18**	**42**

European non-RIS countries						
Country	Graduates per country of study			Graduates per country of origin		
	Joined or created a startup	Launched an innovation within a company	Total	Joined or created a startup	Launched an innovation within a company	Total
Austria	1	0	1	0	0	0
Belgium	10	7	17	2	0	2
Denmark	1	0	1	0	0	0
Finland	8	1	9	0	1	1
France	9	14	23	1	1	2
Germany	10	7	17	7	0	7
Ireland	2	1	3	0	0	0
Netherlands	13	2	15	5	0	5
Sweden	26	13	39	0	0	0
Switzerland	0	0	0	1	0	1
United Kingdom	4	0	4	0	2	2
Total	**84**	**45**	**129**	**16**	**4**	**20**

Other countries						
Country	Graduates per country of study			Graduates per country of origin		
	Joined or created a startup	Launched an innovation within a company	Total	Joined or created a startup	Launched an innovation within a company	Total
Bangladesh	0	0	0	1	1	2
Brazil	0	0	0	2	3	5
Brunei	0	0	0	1	0	1

China	0	0	0	0	2	2
Colombia	0	0	0	3	2	5
Costa Rica	0	0	0	1	0	1
Ecuador	0	0	0	2	0	2
Egypt	0	0	0	1	1	2
Ghana	0	0	0	0	2	2
Georgia	0	0	0	1	0	1
Guatemala	0	0	0	0	1	1
India	0	0	0	11	6	17
Indonesia	0	0	0	1	0	1
Iran	0	0	0	0	2	2
Kazakhstan	0	0	0	1	0	1
Mexico	0	0	0	1	0	1
Namibia	0	0	0	1	0	1
Nigeria	0	0	0	1	2	3
Pakistan	0	0	0	2	3	5
Philippines	0	0	0	0	1	1
Russia	0	0	0	1	0	1
South Africa	0	0	0	1	0	1
Syria	0	0	0	0	1	1
USA	0	0	0	2	0	2
Venezuela	0	0	0	1	1	2
Total	**0**	**0**	**0**	**35**	**28**	**63**

Source: Ecorys, based on the JRC survey data

When the country of origin of alumni is considered, half of the alumni who took part in the survey and reported that they have created or joined a start-up after EIT programme graduation or have launched an innovation, come from non-European countries (mostly India). Those originating from RIS countries are 34% (mostly from Italy and Spain), and those from European non-RIS countries are 16% (mostly from Germany and the Netherlands) (Table 62 above).

2.2.8 EIT-Label graduates employed

This indicator captures the number of Master's and PhD graduates from EIT-labelled programmes who are employed in sectors relevant to their field of study. It includes graduates who secured employment before, or were offered a position prior to, graduation, as well as those who entered a degree-relevant sector within three years after completing their studies. The data is disaggregated by country of citizenship. The information is based on responses collected through the online survey conducted by the JRC in mid-2025 among graduates who participated in EIT-labelled education and training supported by KICs.

Data limitations are due to the low survey response rate. The number of respondents who are graduates from EIT-labelled programmes and have been employed following the programme, or shared their employment status, is 234 out of the total 297 respondents. The rest have not shared where they work. In addition, since no data were available on whether the newly acquired job is related to the EIT-labelled programme, each company name was checked for relevance to the EIT-labelled programme. Companies/ organisations for which it was impossible to attribute a specific field of work have been removed from the analyses.

2.2.8.1 Contribution per KIC

152 (of 234 in total) respondents shared a positive opinion of their employment status after an EIT-labelled programme and the workplace. The highest absolute value of graduates from EIT-labelled programmes who are employed in the same field is from EIT InnoEnergy (73 respondents), while the highest relative number from the respective total KIC-related respondents is registered for EIT Digital (84%) (Table 63).

Table 63. Graduates who are employed following an EIT-labelled programme (per KIC)

KIC	Employed after an EIT-labelled programme		Employment status not indicated	Employed in an EIT-labelled programme-relevant sector		Total respondents
	#	%	#	#	%	#
EIT Climate-KIC	6	75%	2	4	50%	8
EIT Digital	28	90%	3	26	84%	31
EIT InnoEnergy	85	89%	10	73	77%	95
EIT Health	8	89%	1	4	44%	9
EIT RawMaterials	29	60%	19	13	27%	48
EIT Food	21	70%	9	12	40%	30
EIT Manufacturing	20	91%	2	12	55%	22
EIT Urban Mobility	10	83%	2	7	58%	12
Multiple KICs	1	50%	1	1	50%	2
KIC not indicated	26	65%	14	0	0%	40
Total	**234**	**79%**	**63**	**152**	**51%**	**297**

Source: Ecorys, based on the JRC survey data

The annual net income ranges of the employed graduates of EIT-labelled programmes vary between below EUR 10 000 to over EUR 100 000 (Table 64). For statistical purposes, only the last workplace and position of each respondent is considered if multiple entries are filled out. **More than half of the graduates have reported annual earnings between EUR 30,000 and EUR 50,000** (n = 81; 53%).

The highest absolute number of employees with salaries above EUR 50,000 is recorded for EIT InnoEnergy (n = 24; 33%). Only 4 respondents report salaries above EUR 100,000.

Table 64. Annual net income of graduates from EIT-labelled programmes who are employed in the same field (per KIC)

Annual net income	EIT Climate-KIC	EIT Digital	EIT InnoEnergy	EIT Health	EIT RawMaterials	EIT Food	EIT Manufacturing	EIT Urban Mobility	Multiple KICs	Total for all KICs
< EUR 10 000	-	-	1	-	-	3	1	1	-	**6**
EUR 10 000 – EUR 20 000	-	1	1	1	-	-	-	-	-	**3**
EUR 20 000 – EUR 30 000	-	3	4	-	1	3	5	2		**18**
EUR 30 000 – EUR 40 000	-	3	23	3	6	4	3	3	1	**46**
EUR 40 000 – EUR 50 000	-	10	18	-	4	1	2	-	-	**35**
EUR 50 000 – EUR 60 000	-	3	10	-	2	1	-	-	-	**16**
EUR 60 000 – EUR 70 000	1		7	-	-	-	-	-	-	**8**

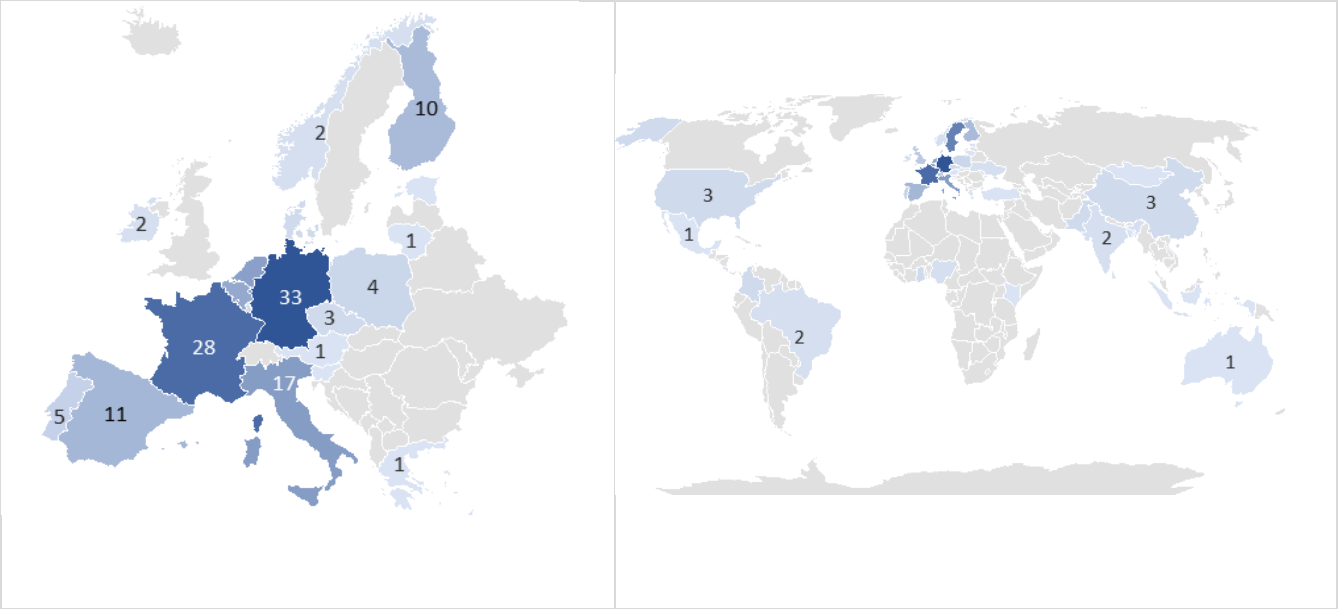
EUR 70 000 – EUR 80 000	1	1	5	-	-	-	-	-	-	**7**
EUR 80 000 – EUR 90 000	1	1	-	-	-	-	-	-	-	**2**
EUR 90 000 – EUR 100 000	-	1	-	-	-	-	-	-	-	**1**
> EUR 100 000	-	2	2	-	-	-	-	1	-	**5**
Not shared	1	1	2	-	-	-	1	-	-	**5**
Total	**4**	**26**	**73**	**4**	**13**	**12**	**12**	**7**	**1**	**152**

Source: Ecorys, based on the JRC survey data

2.2.8.2 Geographical impact

Geographical impact was analysed based on the country of the last reported workplace and position for each respondent. **The graduates from EIT-labelled programmes who responded to the survey report employment in various countries all around the world, with a significant focus on EU countries** (Figure 32). Most respondents work in Germany (n = 33), France (n = 28), and Sweden (n = 21), and the employees in these countries, who are confirmed working in the same field as the EIT programme, are respectively 20, 22, and 18 (Table 65). **Most of the employees after EIT-labelled programme, who are working in the same field, work in European non-RIS countries** (n = 104; 68%). The geographical distribution of employment largely correlates with the location of the universities where respondents received their education and training. Most of these universities are located in Sweden (62), Spain (49), Italy (47), France (46), and Germany (41) (see Table 159 in Annex 4). Other factors influencing the employment of EIT graduates include the demand for specialists in KIC-supported sectors and the labour market conditions in each respective country.

Figure 32. Graduates who are employed following an EIT-labelled programme (per country of employment)



Source: Ecorys, based on the JRC survey data

Table 65. Graduates who are employed following an EIT-labelled programme (per country of employment)

RIS countries		
Country	Employees after the EIT-labelled programme	Employees after the EIT-labelled programme working in the same area
Czech Republic	3	2

Estonia	1	
Greece	1	1
Italy	17	9
Lithuania	1	1
Poland	4	2
Portugal	5	3
Slovenia	1	1
Spain	11	9
Turkey	1	1
Ukraine	2	
Total	**47**	**29**
European non-RIS countries		
Country	Employees after the EIT-labelled programme	Employees after the EIT-labelled programme working in the same area
Austria	1	1
Belgium	14	9
Denmark	3	3
Finland	10	7
France	28	22
Germany	33	20
Ireland	2	1
Luxembourg	3	2
Netherlands	16	12
Norway	2	2
Sweden	21	18
Switzerland	11	4
United Kingdom	7	3
Total	**151**	**104**
Other countries		
Country	Employees after the EIT-labelled programme	Employees after the EIT-labelled programme working in the same area
Australia	1	1
Bangladesh	1	0
Brazil	2	1
China	3	1
Colombia	3	3
Costa Rica	1	1
Ghana	3	0
India	2	1
Indonesia	1	1
Kenya	1	1
Mexico	1	1

Mongolia	1	0
Nigeria	2	0
Pakistan	4	2
Singapore	2	0
Sri Lanka	1	0
United States	2	2
Unknown	5	4
Total	**36**	**19**

Source: Ecorys, based on the JRC survey data

Respondents reporting salaries in the highest quartile, defined as those falling within income bands F to K (i.e., above EUR 50,000 net per year), are predominantly employed in the Netherlands (n = 7), France (n = 6) and Germany (n = 6) (Table 66).

While this pattern may partly reflect comparatively higher salary levels in these countries, it should also be interpreted in light of the survey distribution, as the JRC sample draws from a larger pool of graduates based in these locations. Accordingly, the country breakdown should be read as indicative of the sample composition rather than as evidence of cross-country differences in earnings.

Table 66. Annual net income of graduates from EIT-labelled programmes who are employed in the same field (per country of employment)

A – < EUR 10 000; **B** – EUR 10 000 – EUR 20 000; **C** – EUR 20 000 – EUR 30 000; **D** – EUR 30 000 – EUR 40 000; **E** – EUR 40 000 – EUR 50 000; **F** – EUR 50 000 – EUR 60 000; **G** – EUR 60 000 – EUR 70 000; **H** – EUR 70 000 – EUR 80 000; **I** – EUR 80 000 – EUR 90 000; **J** – EUR 90 000 – EUR 100 000; **K** – > EUR 100 000+.

Country	A	B	C	D	E	F	G	H	I	J	K	Unknown	Total
Australia							1						**1**
Austria					1								**1**
Bangladesh													**0**
Belgium				5	3	1							**9**
Brazil							1						**1**
China					1								**1**
Colombia			2		1								**3**
Costa Rica					1								**1**
Czech Republic				1	1								**2**
Denmark					1	1						1	**3**
Estonia													**0**
Finland	1			2	4								**7**
France		1	7	3	4	1	2	2			1	1	**22**
Germany		1	3	6	3	3	1	1			1	1	**20**
Ghana													**0**
Greece						1							**1**
India	1												**1**
Indonesia							1						**1**
Ireland				1									**1**
Italy	3	1	1	4									**9**
Kenya					1								**1**
Lithuania				1									**1**
Luxembourg								1				1	**2**
Mexico				1									**1**
Mongolia													**0**
Netherlands	1		1	2		4	1	1	1			1	**12**
Nigeria													**0**
Norway				1		1							**2**
Pakistan											2		**2**
Poland				2									**2**
Portugal				2	1								**3**
Singapore													**0**
Slovenia						1							**1**
Spain			3	4	2								**9**
Sri Lanka													**0**
Sweden			1	7	8	2							**18**
Switzerland					1		1	1	1				**4**
Turkey				1									**1**
Ukraine													**0**
United Kingdom				1	1					1			**3**
United States								1			1		**2**
Unknown				2	1	1							**4**
Total	**6**	**3**	**18**	**46**	**35**	**16**	**8**	**7**	**2**	**1**	**5**	**5**	**152**

Source: Ecorys, based on the JRC survey data

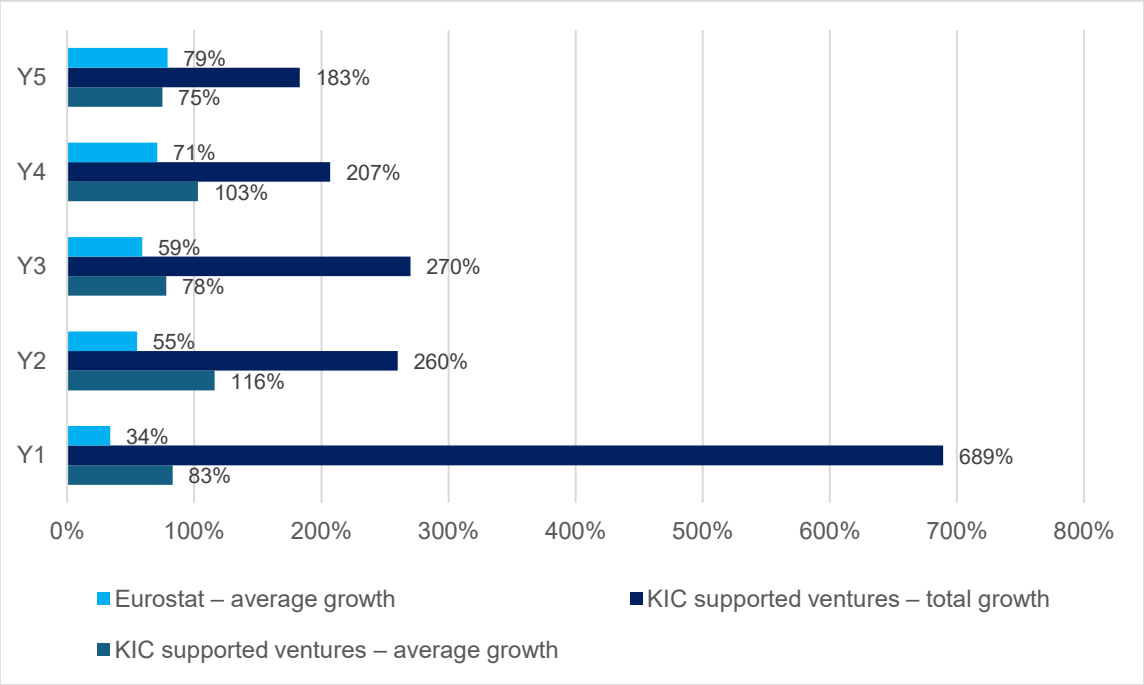
2.2.9 EIT's contribution to impacts

Employment growth is a central indicator of entrepreneurial impact, as young enterprises not only drive innovation but also serve as a key source of new jobs in the European economy. Eurostat data show that enterprises created between 2017 and 2022 experienced strong growth trajectories. On average, 1-year-old enterprises in 2022 expanded employment by 34,2% relative to their founding year, while 2-year-old enterprises grew by 54,5%, and those aged 3 years grew by 58,8%.[103]

Employment continued to rise among older cohorts, with 4-year-old firms reaching 70,7% and 5-year-old firms achieving 78,9%, corresponding to an average annual employment growth rate of over 12%. Sectoral differences exist, with industrial enterprises showing particularly strong early growth but signs of levelling off as they mature, likely due to operational capacity limits, market saturation, or external shocks such as the COVID-19 pandemic.[104]

When benchmarked against these EU-wide trends, ventures supported by the EIT KICs demonstrate substantially stronger employment dynamics. Using the same Eurostat methodology and considering companies founded between 2017 and 2022, available data on EU-headquartered KIC-supported firms reveal **employment growth rates far exceeding the EU average**.[105] Five-year-old ventures recorded an average cumulative increase of 183% (an average 75% annual growth), while younger cohorts showed similarly impressive results, as can be traced in Figure 33.

Figure 33. Employment growth of young enterprises by survival year



Source: Ecorys, based on Eurostat[106] and Dealroom data

[103] Eurostat. Entrepreneurship - statistical indicators. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Entrepreneurship_-_statistical_indicators.
[104] European Commission. Entrepreneurship - statistical indicators. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Entrepreneurship_-_statistical_indicators.
[105] Numbers calculated based on Dealroom data, only for the EU registered enterprises, created between 2017 and 2021, with a growth measured between the first and the last reported number of employees. Companies where number of employees was provided only for one year were excluded. Hence, the sample of companies was very limited (below 100, depending on the maturity).
[106] Eurostat. Business demography by size class and NACE Rev. 2 activity. https://ec.europa.eu/eurostat/databrowser/view/bd_size__custom_17237708/default/table?lang=en.

In 2021, the average size of a newly established enterprise in the European Union was just **1,1 employees**, presenting the predominance of micro-enterprises in the region's business creation landscape. This trend reflects structural characteristics of the European market, including a cultural preference for small-scale operations, regulatory frameworks that support sole proprietorships, and, in some cases, lower labour costs that influence initial staffing decisions.[107]

In contrast, ventures supported by the EIT KICs present a markedly different profile. Among companies founded in 2021, **the average starting size was seven employees**, **significantly above the EU average**. This disparity suggests that EIT-supported enterprises enter the market with larger founding teams, indicative of the **innovation-driven nature of their business models and the greater organisational capacity typically required for technology and knowledge-intensive activities.**

Dealroom also provides employment data across different sectors. However, this information should be interpreted with caution because:

- The sector categories do not perfectly align with the KICs, and some KIC-covered sectors are missing.
- The data does not reflect the specificity of start-ups supported by the KICs, namely their innovative character and typically early stage of maturity.

As a result, it is understandable that the employment contribution of ventures supported by EIT Food, EIT Health, and EIT InnoEnergy appears relatively smaller, since these KICs operate in large and highly diverse sectors. In contrast, EIT Climate-KIC shows a much higher contribution to overall employment. This partly reflects the fact that the climate sector itself is smaller and, additionally, that EIT Climate-KIC's portfolio includes a larger share of more mature ventures for which better data is available (Table 67). Therefore, while these comparisons offer useful insights, they should be treated with caution.

Table 67. KICs and Dealroom data on employment in sectors (# of employees and %)

Dealroom sector/KIC	2018	2019	2020	2021	2022	2023	2024
Food (Dealroom)	1 100 000	4 700 000	5 200 000	7 000 000	10 100 000	10 800 000	10 900 000
EIT Food	788	1 386	3 261	5 838	8 484	9 820	9 738
% employment in the sector	0,072%	0,029%	0,063%	0,083%	0,084%	0,091%	0,089%
Health (Dealroom)	2 700 000	8 900 000	9 600 000	12 000 000	15 900 000	16 400 000	17 500 000
EIT Health	2 488	4 787	8 569	14 172	19 943	21 342	19 927
% employment in the sector	0,092%	0,054%	0,089%	0,118%	0,125%	0,130%	0,114%
Enterprise software (Dealroom)	2 600 000	7 300 000	7 900 000	10 700 000	12 600 000	13 500 000	14 200 000
EIT Digital	6 156	13 659	15 397	14 556	16 644	17 349	10 586
% employment in the sector	0,237%	0,187%	0,195%	0,136%	0,132%	0,129%	0,075%
Transportation (Dealroom)	75 000	305 000	315 000	531 000	682 000	74 9000	812 000
EIT Urban Mobility	n/a	456	1 020	2 090	4 037	4 921	4 803
% employment in the sector	n/a	0,150%	0,324%	0,394%	0,592%	0,657%	0,592%
Energy (Dealroom)	2 200 000	6 700 000	7 000 000	8 400 000	11 700 000	12 400 000	1 2800 000
EIT InnoEnergy	166	999	1 644	4 864	9 095	11 816	13 709

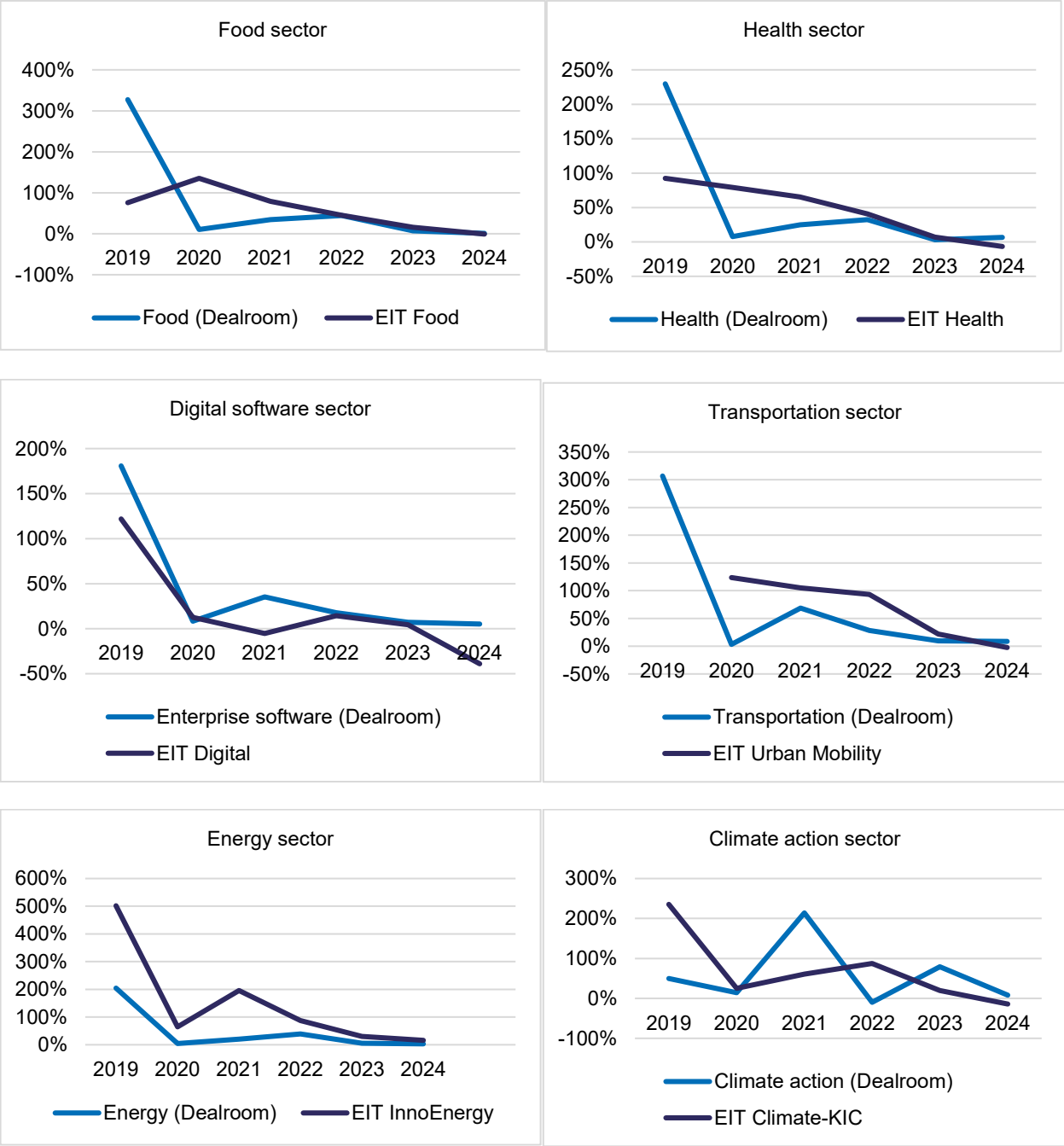
[107] Eurostat. Entrepreneurship - statistical indicators https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Entrepreneurship_-_statistical_indicators.

% employment in the sector	0,008%	0,015%	0,023%	0,058%	0,078%	0,095%	0,107%
Climate action (Dealroom)	83 600	125 000	143 000	449 000	405 000	72 7000	787 000
EIT Climate-KIC	1 475	4 947	6 188	9 954	18 653	22 295	19 139
% employment in the sector	1,764%	3,958%	4,327%	2,217%	4,606%	3,067%	2,432%

Source: Ecorys, based on the Dealroom and additional data from EIT Food and EIT Urban Mobility

When comparing year-to-year percentage growth in employment between EIT-supported ventures and the broader sectors reported in Dealroom, the patterns generally follow similar trends. A notable exception is EIT Health: in 2020, overall sector employment declined, while ventures supported by EIT Health still recorded positive employment growth due to the COVID-19-driven increased needs in the sector. The most significant divergences appear in the climate sector, as shown in Figure 34.

Figure 34. Trends in sectoral employment (Dealroom data)



Source: Ecorys, based on the Dealroom and additional data from EIT Food and EIT Urban Mobility

When analysed against sectoral employment statistics from Cedefop and Eurostat,[108] the dynamics of KIC-supported ventures must be interpreted with caution. At the European level, sectoral employment patterns are relatively stable (0-5% annually), reflecting the large scale of the workforce and the structural inertia of established industries. In contrast, KIC-supported enterprises, typically younger, innovation-driven, and operating from a much smaller baseline, naturally display **steep employment increases in their formative years, followed by a stabilisation phase as they mature.** This trajectory is consistent with established models of entrepreneurial growth and does not lend itself to direct comparison with aggregated EU sectoral data.

While Table 68 below illustrates these developments, its interpretive value is limited. The relative immaturity of the KIC venture portfolio means that only with additional years of observation will more robust and generalisable trends emerge. Early employment volatility is an expected feature of start-up ecosystems, and therefore, survivability rates and the incidence of high-growth enterprises are more scientifically reliable indicators of long-term impact than short-term employment figures.

From a modelling perspective, the trends are consistent with the expected lifecycle of innovation-driven start-ups and scale-ups. Employment growth is highly concentrated in the first years after founding, with diminishing marginal growth as companies mature and stabilise their operations. This aligns with Eurostat's enterprise demography data, where young firms contribute disproportionately to job creation but where sectoral averages smooth out these dynamics due to the weight of larger, established firms.

Table 68. Sectoral employment change vis-à-vis employment in KIC-supported ventures

EIT KIC/ Cedefop/Eurostat statistics – change in employment	2017	2018	2019	2020	2021	2022	2023
Cedefop (ICT service)	2,41%	7,41%	1,84%	11,59%	2,08%	6,42%	5,09%
EIT Digital	**18,62%**	**91%**	**121,88%**	**12,72%**	**-5,46%**	**14,34%**	**4,24%**
Cedefop (Distribution & transport)	1,04%	1,06%	0,73%	-5,65%	1,39%	3,68%	2,33%
Cedefop (Transportation & storage)	2,58%	2%	1,26%	-4,43%	3,93%	0,61%	3,99%
Eurostat (Transportation & storage)	2,48%	1,36%	1,81%	-3,95%	1,96%	2,89%	1,85%
EIT InnoEnergy	**n/a**	**n/a**	**502%**	**65%**	**196%**	**87%**	**30%**
Cedefop (Mining & quarrying)	-6,72%	-1,17%	0,77%	2,90%	-8,19%	-3,79%	-0,27%
Eurostat (Mining & quarrying)	-4,98%	-3,65%	1,63%	1,54%	-6,47%	-1,62%	-3,84%
EIT Health	**n/a**	**3 912,9%**	**92,4%**	**79,01%**	**65,39%**	**40,72%**	**7,01%**
Cedefop (Agriculture, forestry & fishing)	-0,97%	-2,57%	-2,42%	-3,00%	-10,95%	0,97%	-2,89%
Eurostat (Agriculture, forestry & fishing)	-0,99%	-2,72%	-2,48%	-2,24%	-11,47%	-0,89%	-1,55%

[108] Cedefop's Sector employment by occupations (https://www.cedefop.europa.eu/en/tools/skills-intelligence/sector-employment-occupations) and Eurostat's Employed persons by occupation and economic activity (NACE Rev. 2) (https://ec.europa.eu/eurostat/databrowser/view/lfsa_eisn2__custom_18263087/default/table) statistics were used for years 2016-2023. The sectors provided in those statistics do not match one to one with the areas covered by KICs activities, and as such should be treated accordingly.

EIT RawMaterials	**n/a**	**n/a**	**325,97%**	**19,82%**	**87,02%**	**95,10%**	**43,03%**
EIT Food	**n/a**	**n/a**	**75,89%**	**135,28%**	**79,02%**	**45,32%**	**15,75%**
Cedefop (Energy supply services)	-0,80%	0,84%	1,66%	5,49%	0,23%	3,59%	3,13%
EIT Manufacturing	**n/a**	**n/a**	**n/a**	**1,30%**	**58,47%**	**15,95%**	**23,16%**
Cedefop (Health & social care)	2,42%	0,48%	2,89%	-0,83%	2,73%	3,06%	2,10%
Eurostat (Human health and social work activities)	1,93%	1,42%	2,34%	-0,49%	2,67%	2,22%	2,73%
EIT Urban Mobility	**n/a**	**n/a**	**n/a**	**123,68%**	**104,90%**	**93,16%**	**21,90%**
Cedefop (Manufacturing)	1,04%	1,59%	-0,15%	-1,10%	-0,83%	0,67%	-0,41%
Eurostat (Manufacturing)	1,84%	0,83%	-99,90%	98 821,84%	-1,17%	0,73%	-0,69%

Source: Ecorys, based on the Dealroom and additional data from EIT Food and EIT Urban Mobility, Cedefop and Eurostat statistics[109]

In addressing the EU's skills gaps, the EIT serves as a key mechanism.

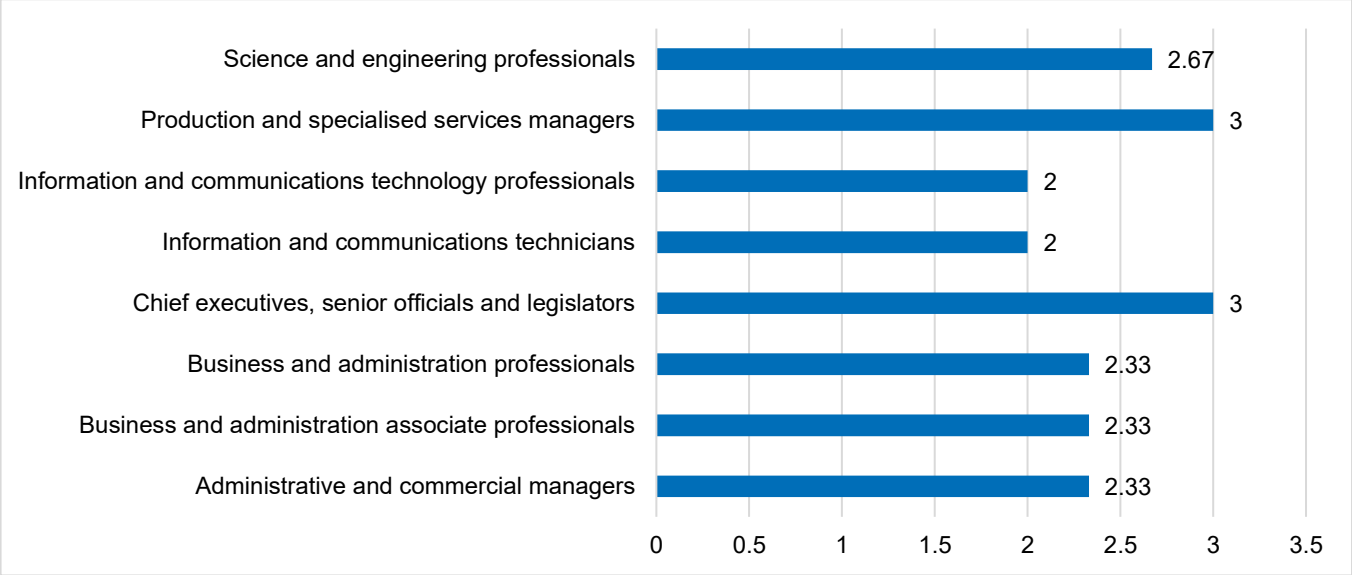
The Cedefop Labour and Skills Shortage Index[110] provides a structured overview of occupational imbalances in the EU labour market. The index, ranging from 1 (no shortage) to 4 (intense shortage), reveals the greatest gaps in high-level leadership and technical expertise (Figure 35). Chief executives, senior officials, legislators, and production and specialised services managers score 3, indicating persistent and strong shortages in managerial and leadership capacity.

Science and engineering professionals, with a score of 2,67, represent another critical area of shortage. This reflects the sustained demand for advanced technical expertise across innovation-intensive industries, particularly those linked to Europe's green and digital transitions. Business-related roles (administrative and commercial managers, business and administration professionals, and associate professionals) exhibit moderate shortages of 2,33, indicating a steady demand for organisational, financial, and commercial management skills.

ICT professionals and technicians record the lowest shortages in this dataset, at 2 each. While still signalling demand above the "no shortage" threshold, these relatively lower values suggest that Europe's ICT talent pipeline has benefitted from stronger investments in digital education and training programmes in recent years (see section on the Societal Impacts of EIT Digital below).

[109] Cedefop's Sector employment by occupations (https://www.cedefop.europa.eu/en/tools/skills-intelligence/sector-employment-occupations) and Eurostat's Employed persons by occupation and economic activity (NACE Rev. 2) (https://ec.europa.eu/eurostat/databrowser/view/lfsa_eisn2__custom_18263087/default/table) statistics were used for years 2016-2023. The sectors provided in those statistics do not match one to one with the areas covered by KICs activities, and as such should be treated accordingly.
[110] CEDEFOP. European skills index. https://www.cedefop.europa.eu/en/tools/european-skills-index/labour-skills-shortage-index.

Figure 35. Labour skills gaps. Cedefop



Source: Ecorys, based on Cedefop Labour and Skills Shortage Index; The index ranges from 1 (no shortage) to 4 (intense shortage)

The KICs directly contribute to mitigating these gaps. **Through their entrepreneurial education programmes, KICs graduate students are equipped with both technical expertise and innovation-driven leadership skills**. EIT Digital, for example, contributes to sustaining the ICT talent pool while embedding entrepreneurial competencies, whereas EIT Manufacturing, EIT RawMaterials, and EIT InnoEnergy target science and engineering skills critical for Europe's industrial competitiveness and green transition. Systematically combining domain-specific knowledge with leadership and entrepreneurship training – a trademark of the EIT model of education – allows KICs to address both the shortages in STEM and digital skills and more acute gaps in leadership and management capacities.

The data on graduates from both EIT-labelled and non-labelled education and training programmes reinforces the positive trends observed in Cedefop-recognised sectors. Between 2018 and 2023, all sectors show an upward trend in the share of professionals, indicating growing demand and participation in these areas.[111] When comparing these trends with the activities of the KICs, there is a plausible connection between sectoral growth and the number of graduates and participants produced by KICs. While Cedefop does not provide absolute employment figures, making full benchmarking impossible, the cumulative graduate and participant numbers suggest that KICs have contributed to this positive trajectory, as shown in Table 69. The correlation between Cedefop sectors and KIC domains is indicative rather than exact. Sector definitions and KIC focus areas do not perfectly align, so these connections should be interpreted with caution.

[111] https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors?sector=05.

Table 69. Ratio of professionals in sectors, and the cumulative number of EIT-labelled alumni and participants in non-labelled education and training based on the surveys

Cedefop sector	2018	2023	Cumulative graduates and participants (KICs)	KIC
ICT services	52,7%	58,7%	17 145	EIT Digital
Distribution & transport	4,9%	6%	37 443	EIT Urban Mobility
Manufacturing	9,5%	12,3%	56 760	EIT Manufacturing
Health & social care	29,2%	32,5%	70 430	EIT Health
Agriculture, forestry & fishing	1,4%	1,8%	54 589	EIT Food
Energy supply services	22,6%	26,3%	111 890	EIT InnoEnergy
Mining & quarrying	11,1%	12,3%	107 861	EIT RawMaterials

Source: Ecorys, based on EIT internal monitoring data and Cedefop statistics[112]

This comparison shows that while the professional share of sectors evolves slowly, **EIT education output is concentrated in areas deemed strategically important for Europe's green and digital transitions**. In some cases, such as ICT and health, KIC outputs align with sectors experiencing significant workforce growth. In others, such as food and raw materials, the graduate output exceeds what sectoral employment shares alone would suggest, pointing to the forward-looking orientation of KIC education activities in those areas.

2.3 Leveraging investments in R&I

KICs are leveraging additional public and private investments through membership fees, revenues from innovations, products and services, and equity-related investments and additional public funding, e.g., at the regional or national level within the EU. They aim to achieve financial sustainability and become independent from EIT funding by the 15th year of operation. KIC financial sustainability is developing according to the planned projections, with some minor deviations for some KICs. The KICs that have passed their 15-year period of EIT support recorded a significant increase in non-EIT financing in the last reporting years, and are already financially sustainable.

2.3.1 Approach, data sources and limitations

The indicator "*Total non-EIT financing generated by the KIC Legal Entity (LE)*" captures the progress of each KIC toward financial independence from EIT funding. It reflects the KICs' ability to secure financing from other public and private sources, generate income from their own activities, and ultimately become self-sustaining within 15 years of EIT support, as outlined in the EIT Financial Sustainability Manual and funding model.

To assess this indicator, the absolute amount of non-EIT financing generated by each KIC LE between 2017 and 2023 was calculated. In parallel, the Financial Sustainability (FS) coefficient was calculated. It is defined as the ratio of the total non-EIT financing generated by the KIC in a given year (N) to the total EIT grant received in that

[112] Cedefop. Skills intelligence.https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors?sector=05.

same year. This ratio (%) serves as a key monitoring tool for the financial sustainability of KICs throughout their lifecycle stages.

The following sources are considered non-EIT financing, contributing to FS, as described in the Financial Sustainability Manual:

a. Contributions from partner organisations, forming a substantial source of funding.

b. Voluntary contributions from Member States, associated countries or third countries or public authorities within them.

c. Contributions from international bodies or institutions.

d. Revenue generated by the KICs' own assets and activities and royalties from intellectual property rights.

e. Capital endowments.

f. Bequests, donations and contributions from individuals, institutions, foundations or any other bodies established under national law.

g. Financial instruments, including those funded from the general budget of the Union.

The analysis of the financial sustainability data is constrained by several limitations, including the lack of geographical disaggregation and the limited timeframe covered by FS reporting (2017–2024).

2.3.2 Total non-EIT financing generated by the KIC Legal Entity

Financial sustainability for KICs means their ability to independently finance activities such as education, innovation, and business creation without relying on EIT funding. To achieve this, KICs are expected to:

> **"Financial sustainability"** is the capacity of a KIC to finance its Knowledge Triangle activities independently of contributions from the EIT.
> (Regulation (EU) 2021/819)

- Mobilise funds from public and private sources.
- Increase income from their own activities (e.g., services, IP, partnerships).
- Attract new partners, especially from industry and the financial sector.
- Develop clear strategies and plans to reach sustainability within 15 years of receiving EIT support.

A dedicated EIT Financial Sustainability Manual supports KICs in this process and is updated annually to guide implementation and good practices.

The EIT funding model is designed to gradually reduce KICs' reliance on EIT funding and incentivise them to become financially sustainable. The EIT monitors the entire portfolio, with decreasing EIT funding rates across four lifecycle phases:

- **Start-up (Years 1–4):** Up to 100% EIT funding.
- **Ramp-up (Years 5–7):** Up to 80% EIT funding.
- **Maturity (Years 8–11):** Up to 70% EIT funding.
- **Exit (Years 12–15):** 50% in Year 12, decreasing by 10 percentage points per year.

The goal of the financial sustainability concept is for KICs to sustain their activities fully without EIT support after the fifteenth year. Thus, an FS coefficient (%) is calculated to monitor the indicator.

By the end of 2024, most of the KICs have shown a trend to increase their FS coefficient (Table 70).

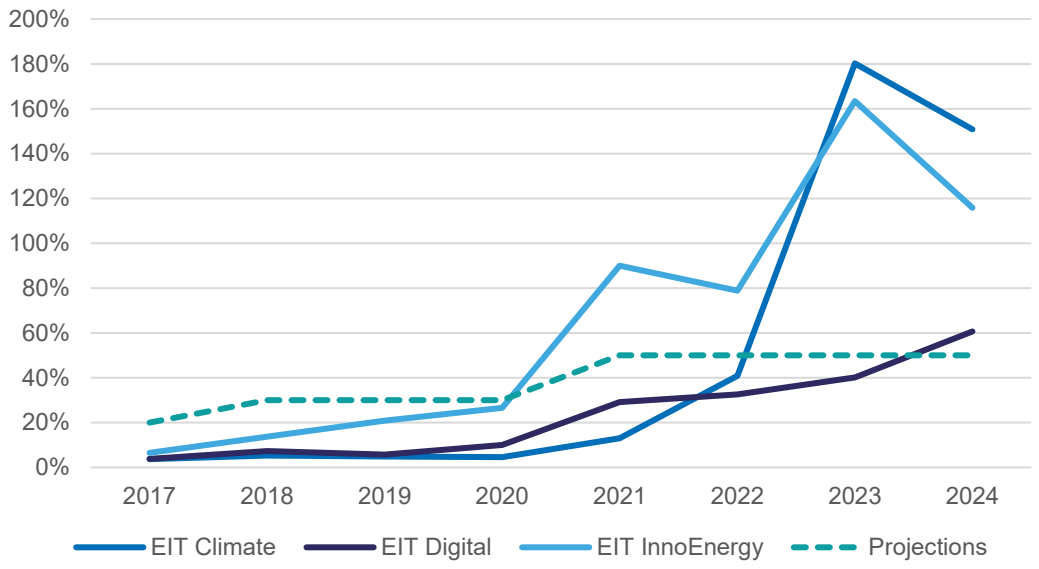
Table 70. KICs FS coefficient through the years (2017-2024)

KIC	FS coefficient (%)							
	2017	2018	2019	2020	2021	2022	2023	2024
EIT Climate-KIC	3,70	5,24	4,87	4,64	13,06	40,80	180,20	158,50
EIT Digital	3,80	7,30	5,71	10,05	29,10	32,60	40,20	60,64
EIT InnoEnergy	6,50	13,70	20,88	26,60	90,00	78,80	163,40	115,80
EIT Health	19,92	13,90	9,94	8,51	19,22	17,50	11,60	13,50
EIT RawMaterials	21,69	17,00	12,27	10,83	16,60	15,10	21,10	19,00
EIT Food	N/A	20,60	11,65	7,95	14,81	10,80	6,70	8,40
EIT Manufacturing	N/A	N/A	N/A	15,73	19,30	13,10	15,70	23,30
EIT Urban Mobility	N/A	N/A	N/A	10,09	12,00	5,02	6,70	10,60

Source: EIT provided data

For the KICs that have been operating since 2010 and are already at the end of their 15-year period, the trends for increasing the FS coefficient are positive. Two of the KICs reached more than 150% for 2023 and over 110% in 2024 (EIT Climate-KIC and EIT InnoEnergy), and EIT Digital achieved a 60% FS coefficient, which is close to the projected FS in the EIT Financial Sustainability Manual (Figure 36). The other KICs are also relatively on track with the projections in the EIT funding model, but a final analysis could be made only when they complete the full financing cycle (Figure 36).

Figure 36. Trends of the FS coefficient for the KICs operating since 2010 and projection of the FS according to the EIT funding model



Source: EIT data

Membership fees have so far been the most important revenue source for EIT Urban Mobility, EIT Manufacturing, EIT Food, EIT RawMaterials, and EIT Health. Once the EIT grant begins to decrease significantly, the KICs will

need to ensure other sources of income, and membership fees will become less important as a result. However, even in those KICs, other income sources have become increasingly significant. For example, services and consulting generated an estimated EUR 1,26 million in 2024 and demonstrated a strong increase in the total share of revenue for EIT Urban Mobility.

The estimate for revenue from alternative funding for EIT Manufacturing in 2024 (EUR 5,11 million) surpassed membership fees (4,27 million EUR est. in 2024) for the first time. Revenue from education activities (EUR 13,87 million est. in 2024) led as the main source of income for EIT InnoEnergy, followed by Return on Investment (ROI) and Equity (EUR 9,53 million est. in 2024). Alternative funding topped all revenue categories for EIT Digital (EUR 10,29 million est. in 2024) and EIT Climate-KIC (EUR 10,91 million est. in 2024).[113]

2.3.3 EIT's contribution to impacts

Access to finance remains one of the most persistent obstacles to business growth and innovation in Europe. European companies are structurally more likely to face financing constraints compared to their United States peers. According to the EIB Investment Survey 2023, 4% of EU firms reported being rejected when seeking external finance, compared to only 1,7% in the United States.[114] The financing challenge is particularly acute for innovative and fast-growing firms. While the European start-up ecosystem has strengthened in recent years, driven by incubators, accelerators, and a more mature venture capital landscape, it still lags behind the United States. Over the past decade, EU scale-ups have raised, on average, 50% less capital than their US counterparts. Moreover, Europe hosts 50% fewer companies valued below USD 500 million compared to the United States, underscoring a smaller pipeline of firms transitioning from early-stage to scale-up status.[115]

This financing gap constrains Europe's ability to retain its most promising innovators. Young firms, particularly those pursuing disruptive technologies, require a business environment that not only embraces new opportunities but also provides tailored financing solutions across the venture's life cycle. Without such conditions, Europe risks losing high-potential ventures to markets with deeper and more agile capital pools.[116]

No separate impact contribution analysis is required for the financial sustainability of the KIC Legal Entities discussed in Section 2.3.2, as these revenues constitute direct financial flows rather than leveraged or induced effects. This subsection therefore focuses on the EIT's contribution to impacts through investments leveraged by start-ups and scale-ups supported by the KICs, where an impact contribution perspective is warranted.

Against this backdrop, the performance of start-ups and scale-ups supported by the EIT KICs stands out positively. Companies nurtured by the KICs have attracted substantial investment, demonstrating the catalytic role of targeted EU support. As of the latest reporting, KIC-backed start-ups and scale-ups have raised a cumulative EUR 15,69 billion in external financing.

Table 71. Investment attracted by KIC-supported start-ups and scale-ups (million EUR)

EIT Climate-KIC	EIT Digital	EIT InnoEnergy	EIT Health	EIT RawMaterials	EIT Food	EIT Manufacturing	EIT Urban Mobility
1 191,71	724,34	9 528,31	1 993,97	593,75	1 331,08	153,81	168,42

Source: Ecorys, based on EIT internal reporting (cumulative KPI EITHE06.1)

[113] Based on summary of Financial sustainability reports for KICs (April 2025).
[114] European Investment Bank (2023). "EIB Investment Survey 2023 -– European Union Overview". European Investment Bank.
[115] European Investment Bank, Fratto, C., Gatti, M., Kivernyk, A., Sinnott, E. et al., The scale-up gap – Financial market constraints holding back innovative firms in the European Union, European Investment Bank, 2024, https://data.europa.eu/doi/10.2867/382579.
[116] European Investment Bank. (2025). Investment report 2024/2025: Innovation, integration and simplification in Europe. European Investment Bank. https://www.eib.org/en/publications/20240354-investment-report-2024.

While the scale of financing attracted by KIC-supported firms remains smaller than that of their US counterparts, the trajectory is encouraging. Coupling investment readiness support with access to networks and expertise provides an effective model for addressing Europe's structural financing weaknesses.

In addition to direct investment outcomes, the analysis considers selected innovation outputs that are closely linked to the ability of ventures to attract external financing. In particular, innovations launched on the market and patents serve as indicators of technological maturity, commercial readiness and appropriability, all of which are key factors influencing investor decisions. These indicators are therefore included in this section as intermediate outcomes that help explain the investment leverage achieved by start-ups and scale-ups supported by the EIT KICs. Furthermore, innovation can be examined from the perspective of innovations launched on the market, which are measured by the EIT as innovations introduced to the market, as presented by year and KIC in Table 72 below.

Table 72. Innovations launched on the markets by KICs

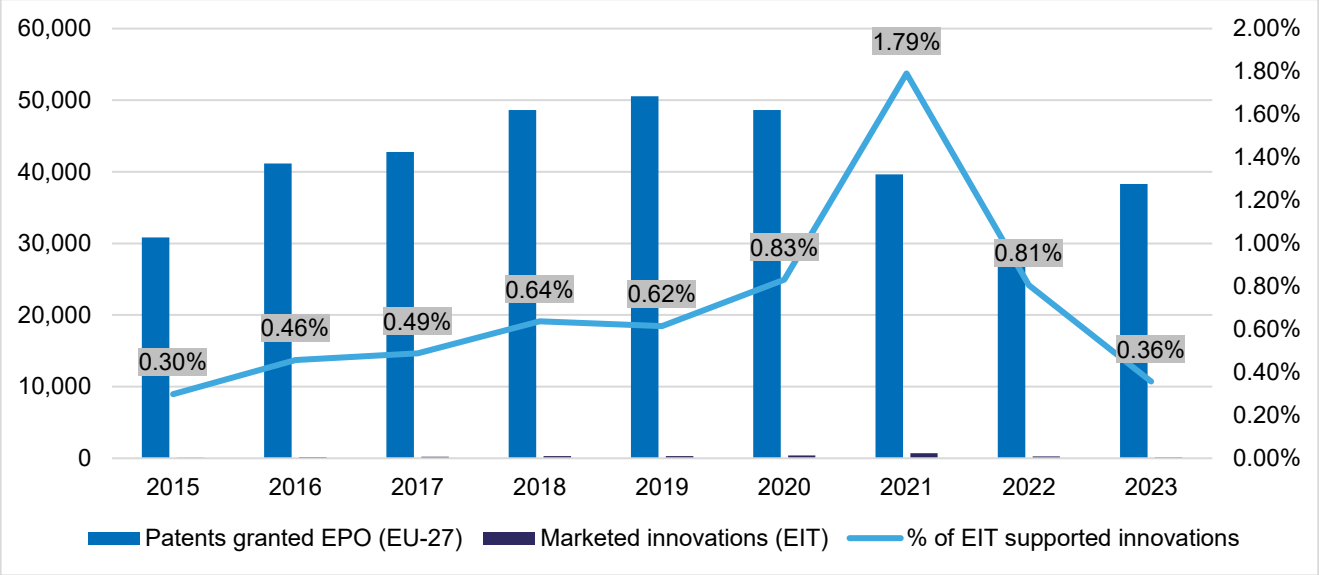
KIC	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	Total
EIT Climate-KIC		6	44	39	52	89	89	115	120	127	62	46			**789**
EIT Digital	3	3	2	20	24	77	96	83	70	78	61	71	43	61	**692**
EIT InnoEnergy			3	12	16	22	21	28	22	21	28	121	68	60	**422**
EIT Health						13	10	20	8	28	8	16	10	12	**125**
EIT RawMaterials						5	3	57	70	82	55	40	26	35	**373**
EIT Food								8	20	31	15	61	39	112	**286**
EIT Manufacturing										15	33	39	22	45	**154**
EIT Urban Mobility										21	15	39	39	61	**175**
Total	**3**	**9**	**49**	**71**	**92**	**206**	**219**	**311**	**310**	**403**	**277**	**433**	**247**	**386**	**3 016**

Source: Ecorys, based on EIT internal reporting (cumulative KPI EITHE02)

Considering the overall trends in patents submitted to the European Patent Office (EPO),[117] some patterns are visible – the drop observed since 2022 is linked to changes in the reporting of the first wave KICs. Up until this point, they had been following the same trend of rising patent filings. At the same time, there is a rather modest ratio of the innovations put on the market with the KICs' support in the overall landscape of patents filed, with a range from 1,79% to 0,3%, as shown in Figure 37 below.

[117] European Patent Office. Statistics & Trends Centre. https://www.epo.org/en/about-us/statistics/statistics-centre#/.

Figure 37. Patented innovations in the EU



Source: Ecorys, based on EIT internal reporting (cumulative KPI EITHE02) and EPO data[118]

In 2024, the European Patent Office saw its strongest growth in fields tied to the energy transition and digitalisation. Electrical machinery, apparatus, and energy surged by nearly 9%, driven by clean energy solutions and battery technologies. Computer technology, which includes AI and machine learning, also grew by over 3%, while transport and biotechnology posted healthy gains. In contrast, traditional sectors like pharmaceuticals and medical technology experienced notable declines, with pharma dropping by more than 13%.

When we look at the ventures supported by EIT KICs over the past decade, a clear pattern emerges. EIT Climate-KIC leads the pack with 732 patents, reflecting a strong focus on climate and energy innovation, well aligned with the EPO's fastest-growing category. EIT Digital follows closely with 624 patents, reinforcing Europe's push into AI and digital technologies. EIT InnoEnergy, with 430 patents, further emphasises sustainable energy solutions.

However, the picture is more nuanced in other areas. EIT Health, for example, has generated 125 patents over ten years, which mirrors the slowdown in medical technology and pharmaceuticals at the EPO. Similarly, while transport-related patents are growing at the EPO, EIT Urban Mobility's contribution remains modest, which should be understood in light of its maturity.[119]

[118] European Patent Office. Statistics & Trends Centre. https://www.epo.org/en/about-us/statistics/statistics-centre#/.
[119] European Patent Office. Patent Index 2024. AI-related inventions and battery technologies surge. https://www.epo.org/en/about-us/statistics/patent-index-2024.

3 Societal Impact Analysis

This chapter provides a strategic assessment of the societal impact generated by the first eight KICs: EIT Climate-KIC, EIT Digital and EIT InnoEnergy, EIT Health, EIT RawMaterials, EIT Food, EIT Manufacturing and EIT Urban Mobility; from their start of operations through end-2024 (using 2025 data where available). The analysis focuses on three main lenses: (i) investment in global challenges (through EIT grant invested in climate action, biodiversity, clean air, digital transformation, health, sustainable development, as well as the impact of KICs on achieving Sustainable Development Goals, SDGs), (ii) contributions to Europe's green, health, digital and industrial transitions, and (iii) gender equality, diversity, and regional cohesion.

The assessment draws on the relevant indicators from the EIT Impact Framework. The investment in the global challenges view relies on the KIC self-assessment of portfolio tagging and SDG contribution.

The review of contributions to green, health, digital and industrial transitions synthesises evidence from European Commission and EIT reports. The scope is deliberately limited to these sources to highlight official assessments and recognised achievements. Subsequent sections of the report present more detailed accounts of the societal impacts and concrete examples from individual KICs.

Gender mainstreaming across the EIT Community is analysed under the EIT Gender Equality Policy and the EIT Gender Equality Plan, as well as the KIC-level measures to improve gender balance in governance, participation and innovation content. Regional cohesion is examined through the EIT RIS, under which each KIC implements a regional strategy to strengthen links with national, regional and local actors.

The detailed methodology for societal impact analysis is presented in Annex 1.

3.1 Investment in global challenges

Societal impact: EIT grant invested in climate action, biodiversity, clean air, digital transformation, health and sustainable development

The key objective of EIT grants is to fuel the transition of innovations developed through EIT KICs from the research phase to market deployment, addressing global challenges such as climate change, biodiversity loss, health, and the digital transition. The specific KPI (EITHE14) monitors the proportion of the EIT's funding portfolio explicitly invested in these areas. It provides insights into how and to what degree EIT grants align with EU and global policy frameworks and needs, serving as a proxy for their relevance to broader societal challenges.

As a common indicator for all KICs, it tracks the level of grants invested in priority areas, based on the Rio markers.[120] Under this methodology, each funded project or activity is "marked" according to its relevance to a specific policy objective (e.g. climate action, biodiversity, sustainable development). The following values are used:

- 0%[121] (Not targeted): The activity does not target the policy objective.
- 40% (Significant): The activity has a significant objective related to the policy area, but this is not its principal purpose.

[120] The Rio markers are a methodology developed by the OECD Development Assistance Committee to track the extent to which public spending contributes to international environmental objectives. Originally introduced to monitor funding commitments made at the 1992 Rio Earth Summit (focused on climate change, biodiversity, and desertification) the markers have since been expanded and applied more broadly, including within EU programmes; https://capacity4dev.europa.eu/groups/public-environment-climate/info/short-guide-use-rio-markers_en.
[121] EU has decided to use 0%, 40% and 100%, respectively to correspond to the Rio values listed; https://capacity4dev.europa.eu/groups/public-environment-climate/info/short-guide-use-rio-markers_en.

- 100% (Principal): The activity's primary motivation is to achieve the policy objective.

The assessment is self-provided by the KICs. A substantial share of the portfolio classified under Rio markers for climate, health, or digitalisation indicates that EIT support targets major global challenges rather than fragmented or niche issues. Overall, the KPI results for years 2021-2024 confirm that while some KICs maintain broad, multi-dimensional engagement with the priority areas, others pursue more specialised or fluctuating approaches, which understandably reflects the sectoral focus of individual KICs, but also the adaptive nature of their portfolios. Specifically:

- EIT Climate-KIC and EIT Urban Mobility show the most consistent and diversified investment, with high percentages across all categories.
- EIT Digital, as could be expected, focuses heavily on digital transformation and SDGs, with no investment in other areas.
- EIT InnoEnergy shows a decline in biodiversity, climate, and digital transformation investments. However, this could be related to their portfolio change and the approaching stage of reaching self-sufficiency.
- EIT RawMaterials has fluctuating trends, especially in clean air, climate, health, and SDGs.
- EIT Health is highly specialised, investing only in health and SDGs.
- EIT Food shows overall balanced but modest investment across all markers.
- EIT Manufacturing is digital-oriented, but that is more diversified than EIT Digital, with moderate engagement in climate, biodiversity, and health. However, its SDG contribution remains relatively low compared to others.
- EIT Urban Mobility presents a diverse and balanced portfolio, with its contributions well-aligned with the Green Deal.

A summary is presented in Table 73.

Table 73. EIT KICs Rio markers 2021-2024

EIT Grant invested in	EIT Climate-KIC[122]	EIT Digital	EIT InnoEnergy	EIT Health	EIT RawMaterials	EIT Food	EIT Manufacturing	EIT Urban Mobility
Biodiversity-related activities	40%	0%	0%	0%	40%->0%	40%	0%	0%
Clean air activities	40%	0%	100%->40%	0%	40%->0%	0%	40%	40%
Climate-related activities	100%	0%	100%->40%	0%	40%	40%	40%	100%
Digital transformation activities	40%	100%	40%->0%	0%	40%	40%	100%	40%
Health activities	0%	0%->40%	0%	100%	40%->0%	100%	0%	40%
SDGs	100%	100%	100%	100%	100%	100%	40%	100%

Source: Internal monitoring data of the EIT (EITHE14)

[122] Climate-KIC did not report on the RIO markers in 2024, the data refers to the years 2021-23 in this column.

3.1.1.1 SDG contribution

Societal impact: Impact of KICs on achieving Sustainable Development Goals

Closely linked to the KPI on EIT grants invested in EU priority areas is the KPI measuring the impact of KICs on achieving the UN SDGs (EITHE15).[123] Like the funding-based indicator, this KPI is based on the self-assessment of KICs, which annually report the SDGs in which their activities have generated an impact. For each SDG, the reported impact is qualified by type and intensity: *strong positive, slightly positive, no impact, slightly negative,* or *strong negative*.

Given this KPI's self-assessment basis, results should be interpreted with caution, as they reflect variability in how individual KICs perceive and report their influence. Nonetheless, this self-assessment offers a useful picture of where EIT KICs assess their contributions to the SDGs as most visible (climate, energy, innovation) and where they feel that gaps remain (poverty, biodiversity, governance). Overall, the connection between the thematic areas covered by the KICs and their impact on the SDGs is evident, although individual differences remain between KICs (Table 74).

Climate Action (SDG 13) emerges as the most consistently reported area of strong positive impact across nearly all KICs, confirming that the EIT portfolio is closely aligned with both EU and global climate priorities (here, especially Green Transition/Deal, which will be a recurring topic across the report). Other areas showing significant contributions include Sustainable Cities (SDG 11), Innovation (SDG 9), Clean Energy (SDG 7), and Responsible Consumption and Production (SDG 12).

Good Health and Well-being (SDG 3) and Quality Education (SDG 4) also feature prominently, though with greater variation across KICs, matching their thematic coverage. For example, as expected, EIT Health and EIT Food report stronger impacts in SDG 3. Gender Equality (SDG 5) and Decent Work and Economic Growth (SDG 8) show more mixed or modest impacts, often rated as “slightly positive”.

Some KICs, particularly EIT Food, EIT Health, EIT Manufacturing, and EIT Urban Mobility, demonstrate stronger engagement. In contrast, water-related goals (SDG 6 – Clean Water and Sanitation, SDG 14 – Life Below Water), Life on Land (SDG 15), and No Poverty (SDG 1) receive limited attention, with most KICs reporting “no impact”, which matches KICs' priorities and portfolios. Finally, Peace, Justice and Strong Institutions (SDG 16) is consistently marked as “no impact” across nearly all KICs, confirming, as could be presumed, that this area falls outside the scope of EIT activities.

Table 74. Profiles of impacts on SDGs as self-reported by KICs

KIC	Profile of SDG impacts, based on self-assessment
EIT Climate-KIC	It positions itself as the EIT’s climate flagship, consistently reporting high contributions to core environmental and systemic SDGs. As such, it remains narrowly focused on sustainability transitions, with limited spillover into other social SDGs.
EIT Digital	Shows a concentrated focus on digital transformation and education, with impacts connected with the SDGs on innovation and human capital. Climate is also mentioned for a strong contribution, but environmental dimensions beyond that are not included.
EIT InnoEnergy	Has one of the broadest impact profiles, including multiple SDGs, but the strongest alignment is with energy transition and green economy goals. Social impacts are acknowledged, but the impact is not assessed as similarly strong.
EIT Health	Highly specialised, with its impact concentrated on health and adjacent social goals (work, education, equity), it does not contribute directly to climate or environmental SDGs.

[123] For the following assessment, year 2023 was considered, as it provided the most complete data across KICs.

EIT RawMaterials	Emphasises impacts in resource efficiency and circular economy (SDGs 9, 12, 11, 13). Its contribution to education and skills is notable, though less visible in biodiversity (14 and 15) and social SDGs.
EIT Food	Demonstrates the most diversified SDG impact profile, spanning environmental, health, and social goals; it uniquely addresses biodiversity (SDGs 14, 15).
EIT Manufacturing	Is positioned between environmental and social goals, reporting contributions to sustainable production, decent work, and digital/educational outcomes; however, environmental impacts are self-assessed as lower compared to other KICs.
EIT Urban Mobility	Heavily aligned with SDG 11 (Sustainable Cities) and systemic transitions (climate, innovation); it also reports on impacts in social dimensions (education, gender).

Source: Internal monitoring data of the EIT (EITHE15)

In addition to the assessment conducted under KPI EITHE15, KICs identify the specific SDGs they aim to address through their activities in their Strategic Agendas. This provides a more detailed overview of intended impacts, as these are often formulated as explicit goals. These references are included, where relevant and appropriate, in the subsequent sections of the report that discuss the Societal Impacts of individual KICs (4 Societal Impacts).

3.2 Contribution to green, digital and health transitions

The following section summarises key findings from the European Commission and EIT reports[124], providing an overview of KIC contributions in these areas. The scope is deliberately limited to these sources to highlight official assessments and recognised achievements. Subsequent sections present more detailed accounts of the societal impacts and concrete examples from individual KICs. In this way, the chapter first situates the KICs within the broader European policy landscape before turning to a deeper exploration of their specific contributions.

The categorisation of KIC activities into health, green, digital, and industrial transitions is to some extent an artificial distinction. In practice, the boundaries between these areas are fluid, and KIC contributions frequently overlap. For example, digital tools are increasingly embedded in health and green innovation, while progress in food, energy, and raw materials directly supports health outcomes and environmental goals. All KICs contribute, in varying degrees, to the Green and Digital Transitions, whether through decarbonisation, digitalisation of processes, or circular economy practices. The following overview therefore provides only a structured summary to illustrate their principal roles, while recognising that their impact is systemic and interconnected across multiple EU transition priorities.

3.2.1.1 Health

EIT Health contributes to the objectives of Horizon 2020 and Horizon Europe and exemplifies the EIT's impact in the health sector by promoting collaborative innovation. Its core mission is to promote and develop innovations in healthy living and active ageing, strengthening the EU's response to health emergencies. It aims to enable citizens to lead healthier lives and contribute to the sustainability of healthcare in Europe.[125] It tackles six healthcare challenges to strengthen healthcare systems, promote better health, and contribute to a sustainable health economy.[126]

With EUR 112 million invested by the EIT, and EUR 40,2 million by partners for the years 2021-2022.[127] EIT Health has supported companies that have successfully attracted further investments, including investment from North

[124] Full list of the reports analysed is presented in the List of references at the end of the document.
[125] EIT Health Strategic Agenda 2021-2027.
[126] EIT, 7-Year assessment of 2nd Wave KICs: EIT Health. Final Report, March 2022.
[127] For years 2021-2022; European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 24 – Evaluation of EIT Health. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025SC0110, p. 7.

America.[128] It provides specialised support, having been deemed especially effective in certification and validation processes for innovations, filling a gap in the European healthcare market.[129] It has assisted companies in attracting further investment, including from outside Europe, and is noted for its role in certification and validation processes, where European healthcare innovators often face challenges.[130] Collaboration is a defining characteristic of EIT Health's work. Within the EIT KIC community and the wider EU innovation landscape, it has developed synergies with initiatives such as the EIC and the European Investment Fund (EIF).[131]

For example, in partnership with the latter, EIT Health leads the Venture Centre of Excellence, a public-private co-investment programme supporting financing for SMEs in the European health landscape.[132] Among KICs, it has frequently been selected by counterparts for partnership, and it is one of three EU-level partners in the European Partnership for Personalised Medicine (EP PerMed).[133] In addition, EIT Health engages with Directorate-Generals, including DG SANTE, DG RTD, and DG GROW, through its Strategic Advisory Board.

EIT Food addresses the issues of healthy living and was established with the main goal of accelerating the transformation of food production, distribution, and consumption to build a future-fit, healthy, and sustainable food system. It addresses agri-food systemic weaknesses by selecting activities as a portfolio rather than addressing only individual issues. This systemic, people-centric perspective provides a clear EU added value, especially when contrasted with most Member States' funding, which often focuses solely on primary production.[134]

It aligns its objectives with major policy frameworks that address health, such as the EU's Farm-to-Fork Strategy, which promotes healthy diets and sustainable food systems for human well-being.[135] EIT Food also complements other Horizon activities by focusing on the later stages of the innovation life cycle, bringing innovations to the market, and dealing with higher TRLs than typical Pillar II funding.[136] It further supports the launch of innovations on the market to improve dietary choices: products that support compliance with the recommended Food-Based Dietary Guidelines for Europe.[137]

Between 2017 and 2023, EIT Food received EUR 305 million grant from the EIT.[138] When combined with EUR 1 122 billion in co-investments attracted by supported start-ups, this has delivered a leverage factor of 4,97, indicating that nearly five euros of external investment have been mobilised for every euro of EIT funding.[139] Beyond individual projects, EIT Food is shaping the broader nutrition landscape. Discussions with the American Nutrition Association on creating a European Nutrition Association aim to strengthen professional networks and

[128] Ibid, p. 16.
[129] Ibid.
[130] Ibid.
[131] Ibid; EIT, 7-Year Review of 2nd Wave KICs: EIT Health. Final Report, March 2022.
[132] Ibid, p. 8.
[133] European Commission, Directorate-General for Research and Innovation. (2024). Performance of European Partnerships: Biennial Monitoring Report 2024 on partnerships in Horizon Europe. Publications Office of the European Union. https://op.europa.eu/en/publication-detail/-/publication/8f71dfd0-76fe-11ef-bbbe-01aa75ed71a1.
[134] European Commission: Directorate-General for Research and Innovation, Fraunhofer Institute, Schwarz, A. and Wydra, S., "EIT Food" – Horizon Europe and the green transition interim evaluation support study – Partnership evaluation report, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2777/3661526.
[135] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 23 – Evaluation of EIT Food. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025SC0110.
[136] European Commission: Directorate-General for Research and Innovation, Fraunhofer Institute, Schwarz, A. and Wydra, S., "EIT Food" – Horizon Europe and the green transition interim evaluation support study – Partnership evaluation report, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2777/3661526.
[137] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 23 – Evaluation of EIT Food. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025SC0110, p. 6.
[138] Ibid.
[139] Ibid.

position EIT Food as a leader at the interface of food and health, under the mission of "Healthier Lives Through Food".[140]

EIT Food acted as the Secretariat for the Food Systems Pavilion at UNFCCC COP28,[141] and established[142] the Protein Diversification Think Tank in 2022 to co-create evidence-based roadmaps and recommend policies for protein diversification. Finally, EIT Food emphasises consumer engagement initiatives to promote healthier behaviours, while acknowledging that systemic barriers in consumer choices remain a significant challenge.

Both KICs collaborate structurally through the 'Food4Health' initiative.[143] The main objective of this initiative is to establish a sustainable connection between the two KICs, leveraging their strengths to develop an innovation programme focused on citizen-oriented health and well-being through improved nutrition and behavioural support.

3.2.1.2 Green Transition

The EIT demonstrates a strong alignment with the Green Transition.[144] Analysis of EIT activities under Horizon Europe indicates strong alignment with the Framework Programme's broader objectives, particularly the Green Transition. Data show that 63% of EIT projects contribute directly to green transition goals, demonstrating strong thematic coherence with other Horizon Europe clusters and missions.[145] The EIT contributions suggest indirect contributions from Horizon Europe to the Green Transition that extend beyond the projects assigned to the core environmental clusters (Clusters 5 and 6).

"**EIT Climate-KIC, EIT InnoEnergy and EIT Urban Mobility** contribute to reducing greenhouse gas emissions, designing more efficient transport and infrastructure, supporting a clean energy transition and circular economy, and fostering a competitive and innovative European hydrogen economy and battery industry."[146]

Both the EIT InnoEnergy and EIT Climate-KIC are seen as excellent examples of internationalisation strategies. They engage in international industry alliances outside the EU, and support international education programmes and matchmaking events.[147]

EIT Climate-KIC was established to help the EU mitigate and adapt to climate change. Its main goal is to accelerate the transition towards a decarbonised and resilient society through innovation. The activities of this KIC are strongly aligned with the European Union's goals, particularly regarding the impacts of climate change.[148] It promotes transformative innovations and supports start-ups in securing investments, which contribute to economic

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[140] European Commission, Directorate-General for Research and Innovation, Performance of European Partnerships Biennial Monitoring Report 2024 on partnerships in Horizon Europe, 2024. https://op.europa.eu/en/publication-detail/-/publication/8f71dfd0-76fe-11ef-bbbe-01aa75ed71a1.
[141] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 23 – Evaluation of EIT Food. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN
[142] European Commission, Directorate-General for Research and Innovation, Performance of European Partnerships Biennial Monitoring Report 2024 on partnerships in Horizon Europe, 2024. https://op.europa.eu/en/publication-detail/-/publication/8f71dfd0-76fe-11ef-bbbe-01aa75ed71a1.
[143] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 24 – Evaluation of EIT Health. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN
[144] European Commission, Directorate-General for Research and Innovation. (2024). Horizon Europe and the green transition – Interim evaluation support study: Final report (Phase 2). Publications Office of the European Union. https://data.europa.eu/doi/10.2777/67934, p. 12.
[145] Ibid, p. 53-54.
[146] Within the partnership ecosystem of Horizon Europe programmes; European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024). SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/, p. 92.
[147] European Commission, Directorate-General for Research and Innovation. (2024). Horizon Europe and the green transition – Interim evaluation support study: Final report (Phase 2). Publications Office of the European Union. https://data.europa.eu/doi
[148] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 21 – Evaluation of EIT Climate-KIC. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/EIT, Final Review of EIT Climate-KIC, Final Report, November 2023, p. 15.

growth and address environmental challenges, and it contributes to reducing greenhouse gas (GHG) emissions.[149] Its focus on climate change and sustainability is evident in its efforts to channel resources, expertise, and innovation into climate-positive start-ups, thereby contributing to mitigating environmental risks and seizing economic opportunities.

It has taken strong steps towards facilitating systems innovation relevant to the green transition.[150] Based on lessons learned during the 2014-2020 period (Horizon 2020), which focused predominantly on technological innovation, EIT Climate-KIC adjusted its Theory of Change (ToC) in 2018. The new strategy, 'Transformation, in Time', focuses on transformative, systemic innovation through a demand-led model, moving away from a predominance of innovation supply.[151]

Since 2020, EIT Climate-KIC has utilised Deep Demonstrations, large-scale projects based on a demand-led, place-based approach. The demonstrations create innovation portfolios across multiple areas, including technology, policy, finance, and social change. The experience from Deep Demonstrations contributed to the early development of the European Missions under Horizon Europe.[152] The European Commission's DG RTD integrated lessons from EIT Climate-KIC's systems transformation approach when designing the Horizon Europe Missions on Climate Adaptation, Cities, and Soil. EIT Climate-KIC is also part of the consortium for the Mission Soil implementation platform.[153]

The main goal of **EIT InnoEnergy** is to connect people and resources across the world to accelerate the green energy transition in Europe. It explicitly aligns itself with key EU policies, including the European Green Deal, Horizon Europe, the Clean Energy for All Europeans Package, and measures under the REPowerEU plan.[154] They also strategically support global initiatives such as the Paris Agreement.

KIC targets two key European Societal Challenges: Energy and Climate (decreasing GHG emissions, lowering the Levelized Cost of Energy, and increasing energy system operability through storage) and Economy and Society (job creation, growth, and increased competitiveness).[155] It plays a leading role in three strategic industrial supply chains that are essential for achieving a carbon-neutral Europe by 2050. EIT InnoEnergy has been mandated to lead the European Battery Alliance (EBA), which is discussed in the following sections. It also serves as the Secretariat of the European Solar Photovoltaic Industry Alliance (ESIA), which aims to boost innovation, create 400 000 jobs, and establish 30 GW of annual solar PV manufacturing capacity in the EU.[156]

EIT Urban Mobility has excelled in supporting entrepreneurs and engaging stakeholders, embedding social and community objectives into their strategies. It is dedicated to accelerating the green transition, specifically within the realm of urban mobility and liveable urban spaces. Mechanisms for creating synergies are integrated with other

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[149] European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025), Brussels, 30.4.2025
[150] EIT, Evaluation of EIT Climate-KIC; EIT, Final Review of EIT Climate-KIC, Final Report, November 2023.
[151] European Commission, Directorate-General for Research and Innovation. (2024). European partnership for EIT Climate-KIC – Horizon Europe and the green transition interim evaluation support study: Partnership evaluation report. Publications Office of the European Union. https://data.europa.eu/doi
[152] Ibid.
[153] Ibid.
[154] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 25 – Evaluation of EIT InnoEnergy. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/ European Commission, Directorate-General for Research and Innovation. (2024). EIT InnoEnergy partnership – Horizon Europe and the green transition interim evaluation support study: Partnership evaluation report. Publications Office of the European Union. https://data.europa.eu/doi
[155] European Commission: Directorate-General for Research and Innovation, Austrian Institute of Technology, Paier, M. and Gasser, M., EIT InnoEnergy partnership – Horizon Europe and the green transition interim evaluation support study – Partnership evaluation report, Publications Office of the European Union, 2024, https://data.europa.eu/doi
[156] EIT, Final review of the 1st wave KICs: EIT InnoEnergy. Final Report, November 2023, p. 10.

EU funding programmes, such as the Connecting Europe Facility (CEF) and the Digital Europe Programme (DIGITAL).[157]

It is involved in partnerships under Cluster 5: Climate, Energy and Mobility, including the co-programmed partnership on Zero-Emission Road Transport (2ZERO), thereby contributing to the reduction of greenhouse gas emissions and the development of more efficient transport systems and infrastructure.[158] EIT Urban Mobility is also a partner in the Net Zero Cities project, implementing the "100 Climate-Neutral and Smart Cities by 2030" mission.

EIT Urban Mobility brings together key actors across the entire mobility value chain and emphasises that effective stakeholder engagement enhances the capacity to create, experiment, demonstrate, scale, and deploy solutions. Engagement mechanisms include Special Interest Groups and the City Club.[159]

3.2.1.3 Digital and Industrial Transition

EIT KICs are at the forefront of the EU's digital and industrial transformation. They support the development and adoption of key technologies, foster cross-sectoral collaboration, and build critical mass at the EU level. They facilitate knowledge transfer, bridge value-chain gaps, and support both mature technology development and research.[160]

KICs are building innovation ecosystems that develop concrete solutions to societal challenges, operating at a wider scale than national or regional initiatives alone. They pool resources and competences from different actors to achieve industrial and technological goals that would not be possible for individual Member States or with a fully centralised institution.[161]

KICs significantly contribute to attracting additional investment, supporting the upskilling of the workforce, and, as such, contributing to the SDGs, particularly SDG 8 (Decent Work & Economic Growth), **SDG 9 (Industry, Innovation & Infrastructure)** and SDG 12 (Responsible Consumption & Production). **EIT Digital** explicitly aims to bridge the gap between research and innovation to increase the EU's digital competitiveness and quality of life.[162] Closely aligned with EU priorities and Horizon Europe, the KIC is positioned as a key actor in advancing digital transformation and promoting European digital sovereignty. Its activities also support the implementation of EU regulations and digital standards that safeguard core EU values, including Digital Tech, Digital Industry, Digital Cities, Digital Wellbeing, and Digital Finance.[163]

It seeks to accelerate the market adaptation of research-based digital technologies to support the digital and industrial transitions.[164] Its strategic objectives are aimed at strengthening the EU's impact on the digital sector and achieving a strong, inclusive, fair, and sustainable digital Europe, aligning with the EU's top priorities and Horizon Europe.[165]

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[157] European Commission, Directorate-General for Research and Innovation. (2024). Horizon Europe and the green transition – Interim evaluation support study: Final report (Phase 2). Publications Office of the European Union. https://data.europa.eu/doi/
[158] European Commission. Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024). Brussels: Commission Staff Working Document SWD(2025); April 30, 2025. Accompanying the Communication COM(2025) 189 final: Horizon Europe: Research and Innovation at the Heart of Competitiveness.
[159] European Commission, Directorate-General for Research and Innovation, Performance of European Partnerships Biennial Monitoring Report 2024 on partnerships in Horizon Europe, 2024. https://op.europa.eu/en/publication-detail/-/publication/
[160] E.g. Ibid.
[161] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 22 – Evaluation of EIT Digital. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/, p. 14.
[162] Ibid, p. 2.
[163] EIT, Final Review of 1st Wave KICs: EIT Digital, Final Report, November 2023.
[164] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 22 – Evaluation of EIT Digital. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/, p. 14.
[165] Ibid, p. 2.

The KIC has made significant progress in bringing the outcomes of deep tech digital research and development to the market, particularly in areas crucial for the EU.[166] A notable example is the SME4DD Training SMEs for the Digital Decade project, funded under the Digital Europe Programme. This project provides short-term training in strategic digital technologies such as artificial intelligence, blockchain, and cybersecurity.[167] It further aims to increase the economic impact of EU companies by augmenting their export of digital services.[168] EIT Digital has expanded its influence through strong engagement with Digital Innovation Hubs, as will be discussed in the following chapters. Through these hubs, it delivers acceleration services for start-ups, organises hackathons, and offers tailored training opportunities.[169] It also participates in the New European Bauhaus.[170]

EIT RawMaterials has a strategic mission to secure Europe's supply of raw materials, which are a critical factor for industrial production and the development of modern technologies. Reliable access to critical raw materials is a growing concern for the EU economy, and the KIC is addressing this challenge by supporting the implementation of the EU Critical Raw Materials Act (CRMA) and strengthening supply chains to make them more sustainable and resilient.[171]

A flagship initiative managed by EIT RawMaterials is the European Raw Materials Alliance (ERMA), established under the mandate of the European Commission. ERMA's vision is to secure access to critical and strategic raw materials, advanced materials, and processing know-how that support the EU's industrial ecosystems.[172] In parallel, EIT RawMaterials contributes to the broader sustainability agenda by advancing the sector's transition from a linear "brown" model to a circular "green" economy. Its activities emphasise circular economy approaches, including closing material loops, designing for recyclability, applying life-cycle assessments, and improving resource efficiency.[173]

EIT Manufacturing supports Europe's digital and industrial transition by fostering innovation that makes manufacturing more sustainable, resilient, and competitive. Its strategic objectives include accelerating green manufacturing and fostering sovereignty and competitiveness. By promoting the circular transformation of industry, the servitisation of business models, and the adoption of low-carbon and resource-efficient technologies, it drives the development of solutions for decarbonisation, circular design, energy efficiency, and sustainable materials, directly supporting EU policy goals such as the Green Deal, the Net-Zero Industry Act and the Circular Economy Action Plan. Moreover, EIT Manufacturing strengthens Europe's technological leadership and industrial resilience by scaling up innovations in strategic value chains and enabling flexible, data-driven production systems powered by AI, robotics, digital twins and industrial data spaces. Its recent calls for proposals focus on market-oriented solutions for smart and green manufacturing, automation for human-centred factories, AI-enabled process optimisation, and resilient supply-chain management, ensuring that European manufacturing remains at the forefront of the global industrial transformation.

A key instrument through which EIT Manufacturing supports Europe's industrial transition is the Empowering SMEs programme, first launched in 2023. The initiative targets small and medium-sized enterprises developing or adopting advanced manufacturing technologies, helping them to validate, pilot and deploy innovative solutions. By offering funding, technical guidance, and access to industrial partners, the call enables SMEs to bridge the gap between prototype and market entry, accelerate the uptake of green and digital technologies, and strengthen their

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[166] Ibid; EIT, Final Review of 1st Wave KICs: EIT Digital, Final Report, November 2023.
[167] Ibid.
[168] EIT, Final Review of 1st Wave KICs: EIT Digital, Final Report, November 2023, p. 52.
[169] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 22 – Evaluation of EIT Digital. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/; EIT, Final Review of 1st Wave KICs: EIT Digital, Final Report, November 2023.
[170] European Commission, Directorate-General for Research and Innovation, Performance of European Partnerships Biennial Monitoring Report 2024 on partnerships in Horizon Europe, 2024, p. 504. https://op.europa.eu/en
[171] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 27 – Evaluation of EIT RawMaterials. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/
[172] Ibid.
[173] Ibid.

position within European value chains. Through Empowering SMEs, EIT Manufacturing has become a catalyst for scaling up innovation-driven SMEs that contribute directly to Europe's competitiveness and industrial sustainability.

3.3 Gender equality, diversity and regional cohesion

3.3.1 Gender equality

Promoting gender equality remains a key priority within the EIT and its KICs. It is worth highlighting that gender equality, including gender diversity in teams and decision-making positions, is recognised by the EIT not only as a core value and principle of the European Union but also as a key element for enhancing innovation capacity and increasing returns on investment. Gender equality contributes to better decision-making and corporate governance. It supports attracting and retaining the best talent. Investing in gender equality benefits innovation and technology by improving their quality and relevance. As part of their commitment to inclusive innovation, KICs have implemented measures aimed at improving gender balance (such as in their activities, governance, and results) and the incorporation of gender dimensions into innovation content.

In line with EU policies, the EIT embeds gender mainstreaming across its activities. The EIT Gender Equality Policy[174] sets out a commitment to developing a gender-responsive portfolio of activities and ensuring balanced gender representation in decision-making across the EIT Community. Prior to this, the EIT had already launched dedicated Women Entrepreneurship and Leadership initiatives. Gender equality is recognised as a cross-cutting priority throughout all Horizon 2020 activities. As part of Horizon 2020, the EIT acknowledges the importance of gender equality KPIs across all EIT-supported and funded activities, including those at the EIT and within its KICs. The EIT Gender Equality Plan (GEP),[175] adopted in December 2022, sets out a roadmap to implement the EIT Gender Equality Policy for 2022-2024.[176]

The EIT Gender Equality Policy and Action Plan set two overarching objectives:

1. Strengthen the lead role of the EIT in the innovation landscape in promoting gender equality, women entrepreneurship, and leadership across Europe.
2. Ensure gender equality at the EIT, including gender balance representation in EIT Staff and Management.

To achieve this, the EIT GEP 2022-2024 outlines specific activities, KPIs, targets, and a set of organisational arrangements for implementation for each of the overarching objectives.

EIT requires each KIC to adopt a formal Gender Mainstreaming Policy and aim for balanced gender representation in core programmes and in leadership.

The EIT target of at least 40% women's participation in KIC decision-making bodies by the end of 2024 was met. An important incentive was tying part of the KIC funding to progress on this KPI. The EIT Regulation and the SIA 2021-2027 set clear expectations for improving gender balance in governance, management, and participation across all KICs. This 40% target was achieved a year in advance of the deadline,[177] and all EIT GEP participation targets were met. By the end of 2024, the EIT Community had: 28% women CEO/Owners of start-ups created for innovation (GEP target: 25%); 26,1% women CEO/Owners of supported start-ups and scale-ups (GEP target: 25%), 43% women among students of the EIT-labelled education programmes (GEP target: 40%), and 55,9%

[174] EIT. (2023). Gender Equality Policy EIT December 2022. https://www.eit.europa.eu/library/gender-equality-policy-eit-december-2022.
[175] Ibid.
[176] Ibid.
[177] EIT. (2024). Report EIT Gender Equality Plan 2024 Implementation Report. https://www.eit.europa.eu/sites/default/files/2025-01/EIT%20GEP%202024%20Implementation%20Report.pdf

women among participants in non-labelled education programmes and trainings (GEP target: 50%), becoming one of the European leaders on gender-smart innovation and entrepreneurship.

Gender representation in top governance and management positions across the EIT KICs remains varied. As part of the EIT Impact Framework, this is monitored through indicator EITHE18, which measures the share of individuals from the less represented gender holding positions on KIC boards (e.g. Supervisory Board or equivalent) and in executive and senior management roles, including CEO, COO, CFO/Director of Finance, Chief Strategy Officer, Pillar Directors (Education, Innovation, Business Creation), and CLC Directors.

In 2024, the highest levels of representation were observed in EIT Climate-KIC and EIT Food, both at 59%. EIT Health and EIT Urban Mobility followed with 47%, while EIT Digital and EIT Manufacturing reported 39%. Lower levels were recorded in EIT RawMaterials (29%) and EIT InnoEnergy (27%). In addition to gender mainstreaming, the EIT and its KICs have launched tailored women programmes, addressing gender gaps in critical areas. While EIT and KICs have their own initiatives targeting gender equality, there are also cross-KIC activities:

- Girls Go Circular: Education programme addressing the gender gap in digital and STEM fields, by equipping young women, aged 14-19, with digital and entrepreneurship skills, around the topic of the circular economy. While directly contributing to Action 13 of the European Digital Action Plan, the project is aligned with several additional European policy objectives, including the European Gender Equality Strategy and the new European Innovation Agenda. The programme is also a part of the EIT Ukraine Support Actions and contributes towards the EIT Deep Tech Talent Initiative. The programme is a joint initiative of: EIT RawMaterials, EIT Food, EIT Digital, EIT Health, EIT Manufacturing, EIT Urban Mobility, and EIT Climate-KIC. Over the past four years, the EIT Girls Go Circular has trained over 47 000 girls, reaching over 32 European countries and 1 000 schools across Europe. It has created the Circular Learning Space platform, hosting 18 courses in over 24 languages. In a show of solidarity with students affected by the war in Ukraine, the programme has also translated all its educational materials into Ukrainian, actively supporting the country's education system during this time of crisis. The initiative is complemented by the annual “Women and Girls in STEM Forum”, co-hosted with the European Commission.

- EIT SUPERNOVAS: A joint programme by EIT Food, EIT Manufacturing, and EIT Urban Mobility, tackling the EU’s persistent gender inequality in entrepreneurship and investment, addressing the skills shortages. It equips women with skills to advance in venture capital, investment and leadership, and increase investment in women-led startups. SUPERNOVAS offers, among others:
  - First and only programme in Europe that trains and matchmakes STEM women with VC: Women2Invest.
  - First and only bootcamp in Europe that trains and offers mentorship to women in VC: VC Academy.
  - High-quality bootcamp designed for both novice and experienced business angels, with European reach: Business Angels Academy.
  - The only programme in Europe focused on internationalisation of women-led scale-ups: RocketUp.
  - SUPERNOVAS builds the European Women Investor Network (reaching 160 members by the end of 2024) and is the leading hub in Europe for women in investment and entrepreneurship.
  - In cooperation with EIC, SUPERNOVAS co-organises Women Leadership Programme.

  By the end of 2024, the EIT SUPERNOVAS Rocket Up will have supported 32 women-founded start-ups across Europe. Collectively, the participating startups have attracted more than EUR 22,6 million in investments, following the EIT SUPERNOVAS support.

- EIT Community Red Kalyna (EIT Jumpstarter) was launched in 2023 and is committed to showcasing the exceptional contributions of Ukrainian women innovators in business, science, research, and leadership, celebrating their successes on a global scale. By bringing their achievements to the forefront, the initiative fosters a culture of resilience, collaboration, and innovation, amplifying the impact and visibility of women leaders worldwide. In 2024, the Call was expanded and included organisations that support women innovators, with a special focus on those working with Ukrainians both locally and internationally. In 2024, number of applications to the Programme doubled this year, reaching 71 in total. The initiative has attracted 21 partners for 2024, including Emerging Europe, EEN Ukraine, COST, EUIPO, Tech Ukraine, and others. A key feature of the project is the annual online event, "Her Idea, Our Future: Empowering Resilience," which brings together nominators, nominees, partners, and EIT KIC representatives.
- The EIT Women Award, introduced in 2018 as part of the EIT Awards, celebrates outstanding women innovators from across the KICs, showcasing role models and enhancing their visibility. To further promote women role models and recognition of women's contribution to European innovation, in 2024, for the 2nd time, the EIT joined forces with the European Innovation Council to organise the European Prize for Women Innovators, with the EIT Women Leadership Award as one of the three Award categories.

The 2024 Horizon Europe Report highlights that the EIT has effectively reduced barriers to women's participation in the European innovation ecosystem through gender mainstreaming actions and women-focused projects.[178]

Gender equality-related KPIs are included in the Impact Framework as part of the Societal Impact measurements of some KICs. Those indicators are discussed in the following sections of the report. In 2023, the EIT won the European Union Agencies Network (EUAN) Diversity & Inclusion Award for its achievements in gender smart innovation and entrepreneurship, with a particular focus on the EIT Woman Award.[179]

In 2025, the EIT has been recognised once again for its commitment to inclusion and equality, winning the EU Agency Network Diversity and Inclusion Award 2025 in the category 'Outstanding External Initiative' for its flagship Girls Go Circular programme. This recognition underscores the importance of inclusion in driving innovation and reaffirms the EIT's enduring commitment to promoting gender equality within Europe's innovation ecosystem.

3.3.2 EIT RIS

As outlined earlier, the EIT RIS is the main tool for reducing regional innovation gaps across Europe. Launched in 2014, RIS supports innovators, builds local capacity, and integrates regional actors into pan-European networks. From 2021, RIS activities became mandatory within KICs' strategies, replacing their voluntary basis. Each KIC must develop a regional strategy in its Business Plans to strengthen ties with national, regional, and local innovation actors.

Between 2021 and 2024, the EIT supported over 4 000 start-ups and scale-ups, developed 720 innovations, and graduated more than 300 000 students and learners from EIT programmes[180] in EIT RIS-eligible countries. The number of active KIC partners in RIS countries increased significantly, with 887 active KIC partners in the RIS area by the end of 2022, exceeding expectations. By 2025, this exceeded 1 300 KIC partners from RIS countries. More partners are now from RIS countries (56%) than non-RIS countries (44%).[181]

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[178] European Commission: Directorate-General for Research and Innovation (2024). Performance of European partnerships – Biennial monitoring report 2024 on partnerships in Horizon Europe, Publications Office of the European Union/ https://data.europa.eu/doi/10.2777/991766; EIT (2024). EIT Gender Equality Plan: 2024 Implementation Report, Budapest.
[179] For more information, see the EIT 2024 Gender Equality Report: https://www.eit.europa.eu/sites/default/files/2025-01/EIT%20GEP%202024%20Implementation%20Report.pdf
[180] EIT internal monitoring data.
[181] Ibid.

RIS Hubs and EIT Community Hubs have expanded the EIT's geographical reach, fostering collaboration and supporting local stakeholders. Their networks facilitate the dissemination and exploitation of research and innovation outcomes, bridging gaps between universities, businesses, and venture capital investors.[182]

Similarly to the issue of gender, some KICs have selected indicators relating to greater regional equality, particularly EIT Digital. In the following sections, some indicators addressing enhanced regional cohesion are discussed in more detail.

[182] Ibid.

4 Societal Impacts – KIC-Specific Findings

4.1 EIT Climate-KIC

EIT Climate-KIC's primary goal is to support the EIT in advancing the European Union's strategic priorities for achieving a net-zero greenhouse gas economy, and envisions a prosperous, inclusive, and climate-resilient society, underpinned by a circular, net-zero emissions economy by 2050. Its mission, as stated in the Strategic Agenda 2021-2027, is to support places: cities, regions, and states, and their industrial value chains in achieving transformative climate and resilience objectives through a systems innovation approach. This approach recognises that 'business-as-usual' innovation is progressing too slowly.

In its strategic documents, the KIC positions itself as a key contributor to major EU objectives and policies, including the European Green Deal, the European Recovery Plan, the European strategy for data, the SME Strategy for a sustainable and digital Europe, and the New Industrial Strategy. The KIC emphasises its intention to better understand the link between innovation and the speed and scale of transformation required for rapid decarbonisation and resilience-building, with planned efforts to expand research in this area. Its strategic objectives are:

- **Focus.** KIC amplifies impact across four major systems, with a focus on cities, industry (materials), land-use, and finance, where progress on cutting emissions and building resilience is arguably the slowest.
- **Sustainable Innovation Ecosystems**. EIT Climate-KIC strengthens sustainable innovation and entrepreneurial ecosystems across Europe, particularly within those countries participating in the RIS programme, and supports the HEI-CBI.
- **Next-Generation Climate Entrepreneurship**. Building on its track record, the KIC aims to play a leading role in ushering in the next generation of climate entrepreneurship, emphasising diversity and inclusion. This involves moving toward a systemic approach by:
    - Emphasising innovations across all levers of change (not just technology) that offer transformative potential and promise to become highly successful business ventures ("unicorns").
    - Connecting start-ups with the demand side of innovation.
    - Facilitating the necessary venture capital for promising start-ups to scale.
- **Funding**. The objective is to attract other sources of funding beyond the EIT and achieve full financial sustainability by 2024.
- **Governance, capability, and inclusion**. The KIC seeks to enhance the governance, legal entities, and core capabilities to act as an orchestrator and catalyst within the innovation community. Commitments include shaping a new community value proposition, streamlining funding flow, ensuring openness and transparency (e.g., publishing open calls, maintaining an open-access community), and nurturing the inclusion of diverse innovation actors.
- **Knowledge sharing and diffusion:** The KIC aims at sharing knowledge and experience with other organisations interested in testing and learning from systemic innovation models and gathering insights into the model's impact potential.

- **Synergies and alignment.** The KIC consistently calibrates its approach to contribute to the Union's policy objectives, particularly with respect to the European Green Deal, Horizon Europe, and Next Generation EU. It seeks cooperation and synergy with other EU instruments and partnerships, such as the EIC, the EIB, and other EIT KICs.

The Strategic Agenda (SA) outlines the primary mechanisms designed to achieve the headline impacts targeted for 2027, detailing the key actions and approaches that will drive progress toward these goals. These can be further matched with the Strategic Objectives listed in the SA and the impact KPIs included in the EIT Impact Framework, as presented in Annex 3: KIC Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework. Additionally, the Societal Impact indicators, which are included in the following analysis, are highlighted in bold.

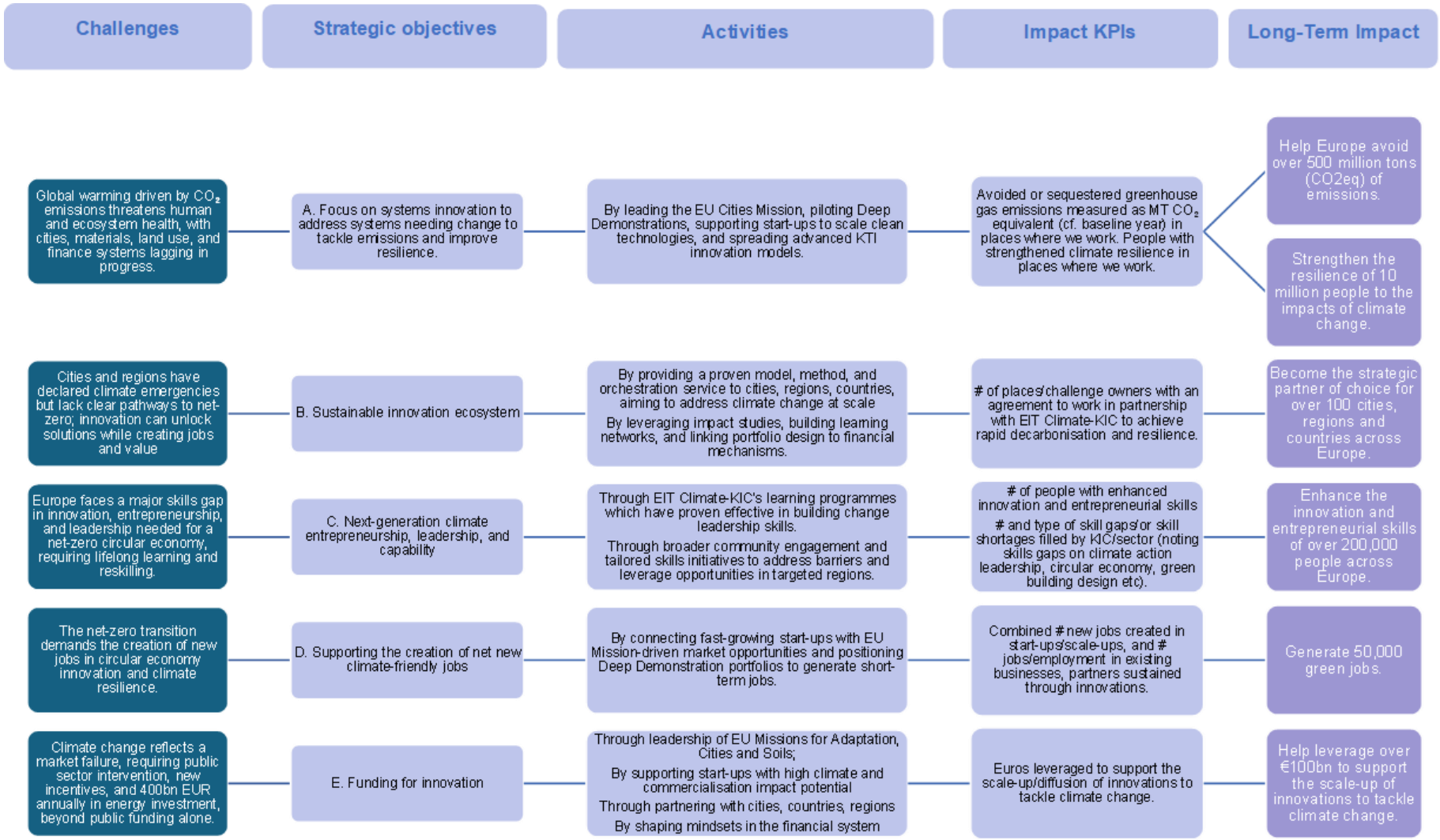
As the table in Annex 3 shows, a causal link can be established between the strategic objectives, targets, actions, and impacts. However, these elements are not presented in this way within the strategic documents, which should be taken into account when interpreting the table. While slightly different categories were used, they are sufficiently similar as not to distort the overall picture of EIT Climate-KIC's goals. Importantly, from the perspective of the following analysis, the activities (i.e. the mechanisms for achieving impact) demonstrate a diversity of approaches through various actions and initiatives, presenting a complex picture of the impact pathway.

4.1.1 Impact pathway

The following diagram presents a simplified Theory of Change, or impact pathway, derived from the EIT Climate-KIC Strategic Agenda 2021-2027. It illustrates how the KIC seeks to respond to pressing societal challenges through defined strategic objectives and the generation of measurable impacts.

The pathway begins with the identification of major societal challenges, such as reducing greenhouse gas emissions, strengthening climate resilience, accelerating the scale-up of climate innovations, and creating new green jobs. These challenges are directly linked to the strategic objectives of EIT Climate-KIC, which focus on systemic innovation, building sustainable ecosystems, fostering entrepreneurship and skills, securing investment for innovation, and supporting the creation of climate-friendly employment opportunities.

Figure 38. EIT Climate-KIC – impact pathway



Source: Ecorys

4.1.2 Overview of the main achievements

Key achievements[183]

- ✓ **100+ regions supported with adaptation strategies, benefiting up to 53 million people.**
- ✓ **Market-ready tools developed (e.g. CRISI-ADAPT II) for real-time risk assessment and planning.**
- ✓ **14 000+ trained in adaptation, filling key skill gaps.**
- ✓ **EUR 1,19 billion**[184]**+ raised by start-ups alumni.**
- ✓ **21 000+ climate-friendly jobs (direct and indirect).**

EIT Climate-KIC, established in 2010, is the EU's largest climate innovation initiative. It aims to accelerate the transition to a decarbonised and resilient society through systemic innovation. With around 105 active partners, it has become a central force in driving Europe's climate agenda, focusing on reshaping innovation models and fostering collaboration across education, science, and business. The KIC has enhanced governance, capability, and inclusion, with a focus on gender mainstreaming and regional innovation, particularly in countries with lower business maturity.

The KIC's innovation projects have significant and multifaceted impacts on climate resilience, both in Europe and globally. This is achieved through a combination of systemic innovation, capacity building, place-based interventions, and the development of practical tools and strategies for adaptation.

The KIC projects focus on place-based innovation, helping EU territories implement adaptation strategies tailored to local climate risks and opportunities. This approach supports the development of a climate-adaptation economy, fosters growth and job creation, and provides competitive advantages while addressing the societal impacts of climate change.

The work includes hands-on guidance, experimentation, and peer reviews to codify learnings and advance the knowledge base for climate resilience. These are large-scale, real-world experiments in cities and regions (e.g., Ireland, Slovenia, Gipuzkoa in Spain) that integrate technical, policy, financial, and business-model innovations. They serve as testbeds to demonstrate systemic change and inspire broader adoption of resilience strategies:

- Through its entrepreneurship activities, EIT Climate-KIC has supported the creation of over 21 000 climate-friendly jobs to date, with a target of 50 000 green jobs by 2027.
- Between 2012 and 2024, 789 products and processes were launched on the market.
- Supported start-ups and scale-ups have attracted over EUR 1,19 billion in investment.

Systemic and societal impacts have been achieved, and EIT Climate-KIC aims to help Europe avoid over 500 million tonnes of CO2 equivalent emissions by 2027. Initiatives such as the **NetZeroCities (NZC) programme**, which supports 112 cities in reaching net-zero emissions by 2030, are central to this ambition.

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[183] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission (2025). Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD (2025) 110 final, Brussels, 30.4.2025.
[184] The number refers to follow-on investments after startups exited the KIC support

The **Pathways to Resilience (P2R)** flagship EU Mission project, led by EIT Climate-KIC, is supporting over 100 regions and communities across Europe (2023–2027) in co-designing and implementing transformative adaptation strategies. Through EUR 21 million in cascade funding, regions can develop ready-to-implement innovation plans, access hands-on training, and receive mentoring. The initiative emphasises participatory approaches, particularly engaging vulnerable communities, and supports regions in developing action and investment plans for climate resilience. The programme aims to benefit at least 10 million people directly and up to 53 million as strategies are implemented.

Climate KIC has **developed advanced tools, such as CRISI-ADAPT II**, a GIS-based platform that provides real-time, site-specific climate risk forecasts and simulates future hazards. This tool supports decision-makers across sectors such as emergency response, port infrastructure, water management, and energy planning, enabling more effective and less costly adaptation measures. The tool is market-ready and supports both public- and private-sector stakeholders in identifying and validating adaptation strategies.

More than 14 000 participants were trained in labelled and non-labelled education activities in 2017-2023, exceeding the targets.

In terms of partnership creation and pan-European impact, EIT Climate-KIC is the strategic partner of choice for over 50 cities, regions, and countries. It orchestrates systemic change through innovation in policy, business models, and public engagement. The KIC has expanded globally, launching initiatives such as **Climathon** in over 100 cities across six continents, engaging with partners in Australia, Africa, Latin America, and Asia, and participating in global climate summits. **In 2024, the Financial Times ranked EIT Climate-KIC 14th among Europe's leading start-up hubs**.

From 2022 onwards, the KIC has diversified revenue streams and achieved a positive income balance. By the end of 2023, its investment portfolio covered 111 supported companies, with a clear roadmap for financial independence as EIT funding phases out.

DG RTD's external evaluation highlights that EIT Climate-KIC is making substantial progress towards its strategic objectives, with notable achievements in innovation, entrepreneurship, funding leverage, and skills development. Few shortcomings remain, particularly in quantifying direct CO_2 reduction from supported start-ups, but the overall trajectory is positive. Overall, EIT Climate-KIC has played a transformative role in Europe's response to climate change, exceeding many of its targets and establishing itself as a leader in climate innovation, entrepreneurship, and systemic change. Its work has resulted in significant economic, societal, and environmental impacts, positioning it as a key driver of the EU's Green Transition and a model for global climate action.

4.1.3 Selection of societal impacts

EIT Climate-KIC measures certain societal impacts, as defined by its Impact Framework, using internal data and conducting internal analyses, these are the impacts included in the following assessment. Impacts related to reduced CO_2 emissions and increased numbers of people with strengthened climate resilience are based on a combination of internal and external datasets; however, these datasets are not included in the current analysis.

Accordingly, the indicators assessed in this analysis are based solely on internal evaluations using available quantitative data, which vary across datasets and types of information. These will be introduced in dedicated sections corresponding to specific indicators.

It is important to note that the following analysis relies, to a significant extent, on data provided and self-assessed by EIT Climate-KIC and should be interpreted accordingly. To complement these findings, ventures that reported receiving support from EIT Climate-KIC, regardless of whether they had brought a solution to market, were asked

to assess the areas in which they believed their organisation had contributed or improved (Table 75 and Figure 39). These areas align with those in the Impact Framework, translated into more user-friendly categories.

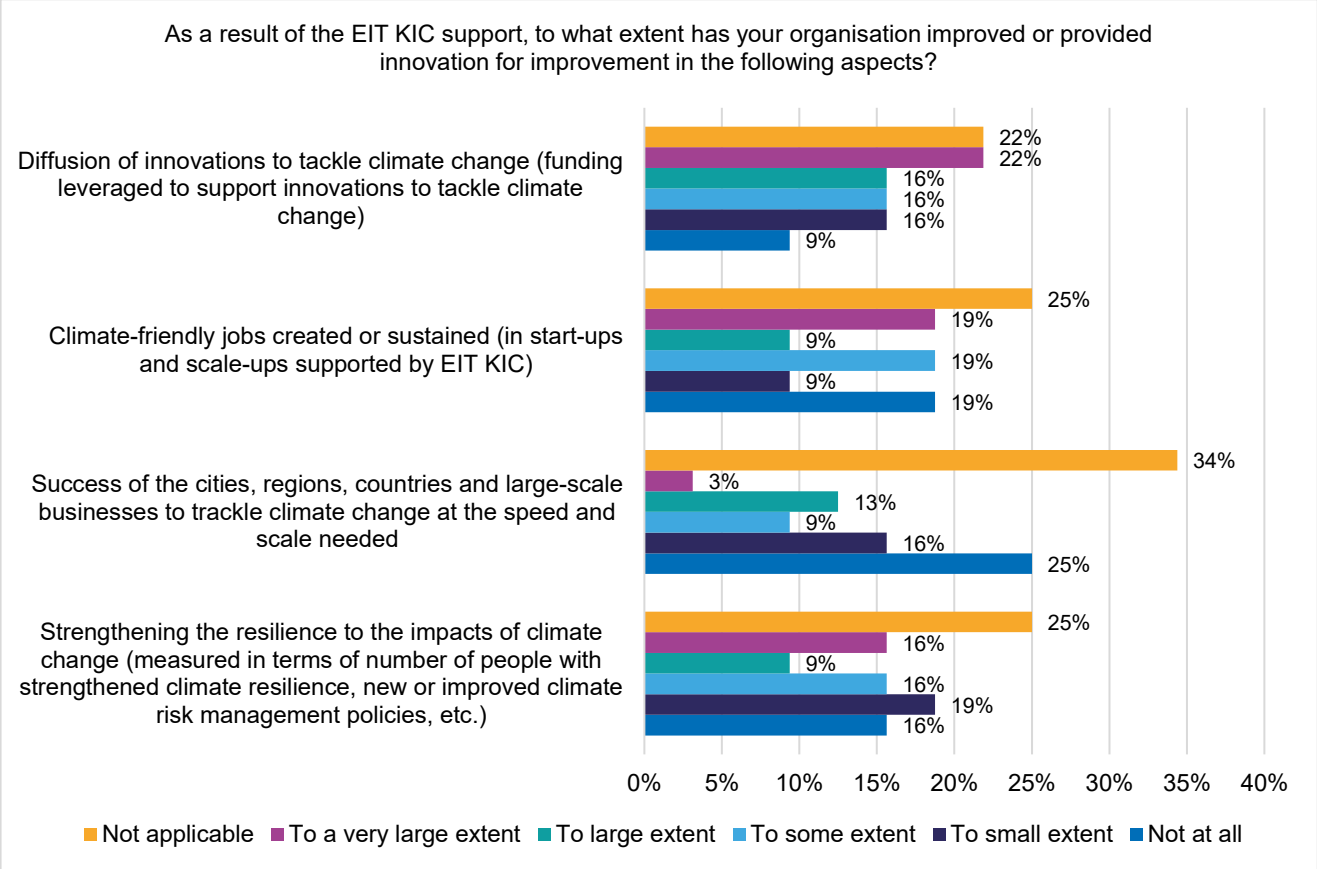
Among respondents who reported a level of improvement (ranging from small to very large), the most frequently selected area was the diffusion of innovations to tackle climate change, funding leveraged to support such innovations (69%). The least selected area was the success of cities, regions, countries, and large-scale businesses in addressing climate change at the required speed and scale (41%). However, overall differences across the sample of 32 responses were not statistically significant, as illustrated in the table and graph below. This was also reflected in the highest level of impact, the very large extent of it, for the leveraging financing, and similarly, the most "not applicable" option was chosen for the success of cities, regions, countries and businesses.

Table 75, EIT Climate-KIC ventures supported (areas of influence) – ventures survey

As a result of the EIT KIC support, to what extent has your organisation improved or provided innovation for improvement in the following aspects?	Not at all	To a small extent	To some extent	To a large extent	To a very large extent	Not applicable
Strengthening the resilience to the impacts of climate change (measured in terms of the number of people with strengthened climate resilience, new or improved climate risk management policies, etc.)	5	6	5	3	5	8
Success of the cities, regions, countries and large-scale businesses to tackle climate change at the speed and scale needed	8	5	3	4	1	11
Climate-friendly jobs created or sustained (in start-ups and scale-ups supported by EIT Climate KIC)	6	3	6	3	6	8
Diffusion of innovations to tackle climate change (funding leveraged to support innovations to tackle climate change)	3	5	5	5	7	7

Source: Ecorys, based on a survey of ventures supported

Figure 39. EIT Climate-KIC ventures supported (areas of influence) – ventures survey



Source: Ecorys, based on a survey of ventures supported

4.1.3.1 Cities, regions, countries, and large-scale businesses succeeded in an ambition to tackle climate change at the speed and scale needed

of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience.

Since the 1980s, Europe has been warming at twice the rate of the global average, making it the fastest-warming continent on Earth. The three warmest years on record for Europe have all occurred since 2020, with the ten warmest recorded since 2007. The year 2024 was the warmest on record across all datasets analysed, with approximately 48% of the continent experiencing record-high annual temperatures. The regions most affected included central, eastern, and southeastern Europe, as well as northern Scandinavia and southeastern Spain.

Southeastern Europe experienced extreme heat during the summer of 2024, including its longest (13 days) and second most severe heatwave on record. That same year, Europe also experienced its most widespread flooding since 2013. An estimated 413 000 people were affected, resulting in at least 335 fatalities and approximately EUR 18 billion in damages caused by storms and flooding across the continent.[185]

The primary cause of current global warming is the continued rise in atmospheric concentrations of greenhouse gases, particularly carbon dioxide (CO_2) and methane (CH_4), which reached record levels in 2024. These gases

[185] Copernicus Climate Change Service (C3S) and World Meteorological Organization (WMO). European State of the Climate 2024. World Meteorological Organization and European Union, represented by the European Centre for Medium-Range Weather Forecasts (ECMWF); 2025. https://climate.copernicus.eu/ESOTC/2024. doi:10.24381/14j9-s541.

trap heat near the Earth's surface, intensifying global warming and driving associated climate impacts, including more frequent and severe weather extremes.[186]

As the Intergovernmental Panel on Climate Change (IPCC) states, human activities are the dominant source of these emissions. The combustion of fossil fuels for energy, deforestation, the use of fertilisers in agriculture, livestock farming, and the decomposition of organic waste in landfills all contribute significantly to the release of CO_2 and CH_4 into the atmosphere.[187]

The latest IPCC synthesis report confirms that global surface temperature increased by approximately 1,1°C above pre-industrial levels (1850–1900) during the period 2011–2020. Many of the climate-related changes seen since the 1950s are unprecedented over decades to millennia, and impacts are being observed across all continents and oceans. This warming has already caused widespread adverse effects on ecosystems and human societies, including loss and damage. Limiting further human-caused global warming will require achieving net zero CO_2 emissions, which is critical to stabilising global temperatures and reducing future risks (Table 76 and Figure 40).[188]

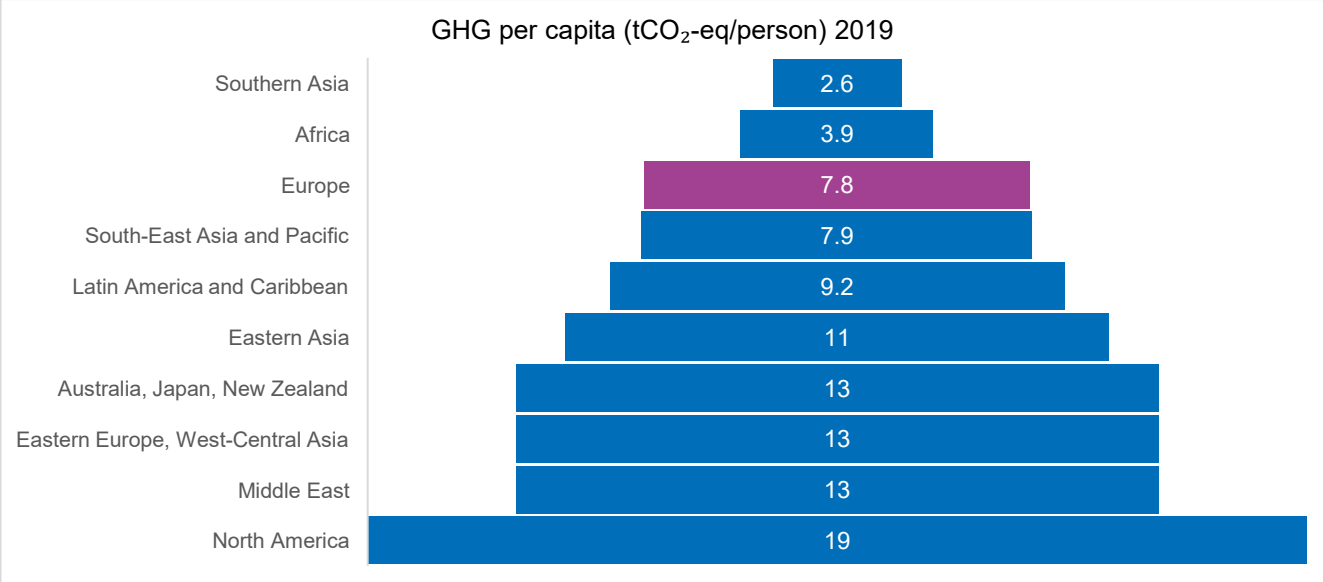
Table 76. GHG emissions: regional indicators (2019) and regional production vs consumption accounting (2018)

Region	Population (million, 2019)	GHG Emissions Intensity (tCO_2-eq/USD1000 PPP 2017)	GHG per capita (tCO_2-eq/person)	Production-based CO_2 FFI per person (2018)	Consumption-based CO_2 FFI per person (2018)
Africa	1 292	0,78	3,9	1,2	0,84
Australia, Japan, New Zealand	157	0,3	13	10	11
Eastern Asia	1 471	0,62	11	8,4	6,7
Eastern Europe, West-Central Asia	291	0,64	13	9,2	6,2
Europe	620	0,18	7,8	6,5	7,8
Latin America and Caribbean	646	0,61	9,2	2,8	2,8
Middle East	252	0,64	13	8,7	7,6
North America	366	0,31	19	16	17
South-East Asia and Pacific	674	0,65	7,9	2,6	2,5
Southern Asia	1 836	0,42	2,6	1,6	1,5

Source: Ecorys, based on IPCC[189]

[186] IPCC. Climate Change 2023: Synthesis Report. Contribution of Working Groups I, II and III to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change. Lee H, Romero J, eds. IPCC; 2023. https://www.ipcc.ch/report/ar6/syr/downloads/report/IPCC_AR6_SYR_FullVolume.pdf. doi:10.59327/IPCC/AR6-9789291691647.
[187] Ibid.
[188] Ibid.
[189] Ibid., p. 45

Figure 40. GHG emission per person: Europe and rest of the world



Source: IPCC[190]

A core challenge identified by the EIT Climate-KIC is that Europe needs inspiration from places and organisations undergoing rapid transformation towards net-zero emissions, while simultaneously promoting inclusion, prosperity, and equity.[191] Despite some progress, most observed climate adaptation efforts are fragmented, small-scale, sector-specific, and unevenly distributed, with the largest gaps affecting low-income and vulnerable populations.

Adaptation efforts often prioritise short-term risk reduction over transformational change and face significant barriers, including limited funding, weak governance, and inadequate data. Maladaptation is increasingly evident across urban planning, agriculture, and ecosystems, often reinforcing existing social inequalities. Some regions and systems have already reached soft or hard adaptation limits, and without accelerated, inclusive, and long-term action, these gaps and associated risks will continue to grow.[192]

They also observe that 'business-as-usual' innovation is not accelerating climate action at the necessary pace. Despite progress, adaptation gaps persist and are projected to widen under current implementation rates, with both hard and soft limits already reached in certain ecosystems and regions. Instances of maladaptation are also emerging in specific sectors and locations.[193]

In their strategic analysis of the challenges, EIT Climate-KIC further states that thousands of cities, regions, and local authorities have declared a climate emergency, yet many "do not yet know how they will transform to achieve their ambitious climate change targets." Hence, EIT Climate-KIC's mission is to use innovation to "unveil these pathways to change," while also generating new jobs and societal value, an objective that is particularly relevant in the context of Europe's recovery from the COVID-19 pandemic.[194]

According to its strategy, EIT Climate-KIC states that achieving deep and sustained emissions reductions while securing a liveable and sustainable future for all requires rapid, far-reaching transitions across all sectors and systems. These transitions depend on substantial scaling-up of a broad portfolio of mitigation and adaptation

[190] Ibid.
[191] EIT Climate-KIC Strategic Agenda 2021-2027.
[192] IPCC. Climate Change 2023: Synthesis Report. Contribution of Working Groups I, II and III to the Sixth Assessment Report of the Intergovernmental Panel on Climate Change. Lee H, Romero J, eds. IPCC; 2023, pp. 61-62. https://www.ipcc.ch/report/ar6/syr/downloads/report/IPCC_AR6_SYR_FullVolume.pdf. doi:10.59327/IPCC/AR6-9789291691647.
[193] EIT Climate-KIC Strategic Agenda 2021-2027.
[194] Ibid.

measures, with accelerated and equitable action identified as critical to meeting the UN SDGs.[195] To drive this transformation, the EIT Climate-KIC's approach focuses on providing a robust model, methodology, and orchestration service, leveraging a proven track record of innovation to support cities, regions, countries, and large-scale businesses committed to addressing climate change at the necessary speed and scale. This work aligns with the strategic objective of transforming urban land-use, material, and financial systems. In addition, the approach draws on impact studies, builds learning networks across participating cohorts, and links portfolio design to financial mechanisms to stimulate demand and reinforce long-term systemic change.[196]

As mentioned in the introductory section of the chapter on EIT Climate-KIC, the pathways to achieving the intended impact are complex and multifaceted. EIT Climate-KIC reports progress on this indicator through its:

- Leading partnership in the **EU Cities Mission**.
- Involvement in the **EU Adaptation Mission** via the **Pathways2Resilience** programme.
- Implementation of **Deep Demonstrations**.[197]
- **Mission 100 Climate-Neutral and Smart Cities by 2030** initiative**.**

The Mission 100 Climate-Neutral and Smart Cities by 2030 is a bold EU initiative aiming to transform at least 100 European cities into climate-neutral, sustainable, and digitally advanced urban centres by 2030. Given that cities are responsible for over 70% of global CO_2 emissions, this engages local governments, citizens, businesses, investors, and national authorities in leading to climate action. These cities will act as innovation hubs, paving the way for all European cities to reach climate neutrality by 2050.[198]

On 28 April 2022, the European Commission announced that 112 cities had been chosen to participate in the Mission: 100 from EU Member States and 12 from Horizon Europe-associated countries. These cities receive targeted guidance and resources from the Mission Platform, which is managed by NetZeroCities.[199]

The **NetZeroCities project** (10.2021-9.2025) is coordinated by EIT Climate-KIC. It is an initiative under the Horizon 2020 Research and Innovation Programme, established to support the objectives of the European Green Deal and the Mission within the Horizon Europe framework. As a service-oriented platform supported by a network of experts, NetZeroCities offers tailored guidance, tools, and systemic approaches to help cities work toward climate neutrality.[200] As such, EIT Climate-KIC is a leading partner in the Mission.

- **Pathways2Resilience**

The Mission on Adaptation to Climate Change is a European Union initiative which aims to support at least 150 regions and communities in building climate resilience by 2030. As part of the EU Adaptation Strategy, its long-term objective is to contribute to a climate-resilient Europe by 2050. The Mission helps regional and local authorities understand climate risks, develop resilience pathways, and implement large-scale adaptation demonstrations. Participation involves engaging in Horizon Europe projects and signing the Mission Charter.[201]

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[195] Ibid.
[196] EIT Climate-KIC Strategic Agenda 2021-2027.
[197] EIT Climate-KIC Impact Measures, Societal Indicators, October 2024.
[198] European Commission/DG RTD. Horizon Europe Missions Monitoring Flash. Publications Office of the European Union; 2025. doi:10.2777/9240870. https://op.europa.eu/en/publication-detail/-/publication/f740c592-1b56-11f0-b1a3-01aa75ed71a1/language-en/ p.17; https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/climate-neutral-and-smart-cities_en.
[199] NetZeroCities. Mission Cities. Meet the 112 Mission Cities paving the way to climate neutrality by 2030.. https://netzerocities.eu/mission-cities/.
[200] NetZeroCities. About the project. https://netzerocities.eu/the-netzerocities-project/.
[201] European Commission/DG RTD. Horizon Europe Missions Monitoring Flash. Publications Office of the European Union; 2025. doi:10.2777/9240870. https://op.europa.eu/en/publication-detail/-/publication/f740c592-1b56-11f0-b1a3-01aa75ed71a1/language-en/ p. 22.

Supporting this effort, the Pathways2Resilience (P2R) project (1.2023-12.2027) aims to assist at least 100 regions and communities in co-designing resilience pathways and innovation agendas. P2R is coordinated by EIT Climate-KIC. It provides EUR 21 million in funding through two calls, along with support services and capacity-building activities. Central to the project is the Regional Resilience Journey (RRJ), which is a structured, flexible framework that guides regions through the planning stages of climate adaptation, focusing on systemic approaches, transformative innovation, and just transition principles. The RRJ outlines steps, tools, and milestones to help regions move from incremental to more transformative forms of adaptation.[202]

- **Deep Demonstrations**

Deep Demonstrations are a strategic initiative developed by EIT Climate-KIC as part of its "Transformation in Time" approach, launched in 2019. They serve as real-world pilots to explore how systems innovation can be applied to support transformative climate action in specific places, sectors, or value chains. Deep Demonstrations provide structured, collaborative environments in which tailored innovation portfolios are co-developed and implemented, and are designed to support organisations, cities, and regions in addressing complex climate challenges.[203]

Each Deep Demonstration follows an iterative process that begins with Intent, where transformation goals are identified in collaboration with local or sectoral leaders. In the Frame phase, relevant systems are mapped, and a preliminary portfolio of potential interventions is designed. This is followed by the Portfolio phase, where interconnected innovation activities are developed and implemented. Finally, the Intelligence phase focuses on generating insights and learning from outcomes to inform decision-making and support wider application.[204]

The following Table 77 provides an overview of the impacts achieved for KPI # of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience.

[202] European Commission. CORDIS - EU research results. Pathways2Resilience: Co-developing pathways towards Climate resilient regions in Europe. https://cordis.europa.eu/project/id/101093942/reporting.
[203] Climate-KIC. (2020). Transformation is Possible: Our Deep Demonstrations. https://www.climate-kic.org/wp-content/uploads/2020/03/Transformation-is-Possible-Our-Deep-Demonstrations.pdf.
[204] Climate-KIC. Deep-Demonstrations-Methodology. https://www.climate-kic.org/wp-content/uploads/2021/10/Deep-Demonstrations-Methodology.pdf.

Table 77. # of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience

Impact indicators	Targets	Impacts achieved
# of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience.	30 by 2024 50 by 2027[205]	EIT Climate-KIC reported a cumulative total of 43 collaboration agreements, Memoranda of Understanding (MoUs), or formal contracts signed to establish the foundations for strategic partnerships, exceeding the target set for 2024 and progressing towards the goal intended for 2027.
		Cumulative up to 2024
		43[206]
		NetZeroCities project/Mission 100 Climate-Neutral and Smart Cities by 2030: Since its launch, the Cities Mission has received EUR 380 million in EU funding from mission-specific calls, 22,4% of the total allocated across the five EU Missions, supporting 27 projects. By September 2023, the Horizon Europe component included 309 projects with a combined EU contribution of EUR 1,87 billion, 16% of which were mission-specific. The average project size is EUR 3,9 million with 11 participants, rising to EUR 7,8 million and 21 participants for mission-specific calls.[207] Within this funding, EIT Climate-KIC received EUR 36,5 million (from the total of EUR 53 million, the rest of which was divided between 34 participants) to implement the NetZeroCities project.[208] The NetZeroCities platform, managed by the KIC and offering advice and assistance, reached **112 cities in 35 countries. 92 cities have been awarded the EU Mission Label** – 10 in October 2023, 23 in March 2024, 20 in October 2024, and 39 in May 2025, in recognition of their commitment to achieving climate neutrality by 2030, as set out in their Climate City Contracts (CCCs).[209, 210] By September 2024, these Mission-labelled cities collectively secured 837 signatories, an average of 25 per city. Signatories include representatives from government, civil society, businesses, knowledge institutions, and service providers, reflecting broad-based support for the cities' climate objectives. The private sector accounts for the largest share of signatories, representing 36% of the total, with significant involvement from sectors such as transport, energy, and architecture.[211]

[205] EIT Climate-KIC Strategic Agenda 2021-2027.
[206] EIT Impact report 2024. Internal data.
[207] European Commission/DG RTD. Horizon Europe Missions Monitoring Flash. Publications Office of the European Union; 2025. doi:10.2777/9240870. https://op.europa.eu/en/publication-detail/-/publication/f740c592-1b56-11f0-b1a3-01aa75ed71a1/language-en/.
[208] https://cordis.europa.eu/project/id/101036519/results.
[209] https://netzerocities.eu/climate-city-contract/.
[210] A Climate City Contract (CCC) is a voluntary agreement between a city and the European Commission, serving as a governance innovation tool under the EU's Climate-Neutral and Smart Cities Mission. It outlines a roadmap, including commitments, actions, and investment plans, to reach climate neutrality by 2030. Co-developed with local stakeholders and citizens, validated contracts earn the EU Mission Label, granting access to funding, expertise, and tailored finance channels such as the Climate City Capital Hub; https://netzerocities.eu/climate-city-contract/.
[211] https://netzerocities.eu/wp-content/uploads/2025/01/CCC-Highlights-A-diverse-ecosystem-of-supporters-2024-12-16.pdf.

Eurostat's statistics offer only a limited insight into the NetZeroCities initiative's impact, focusing solely on CO_2 concentrations in capital cities.[212] Since not all capitals are part of NetZeroCities, and conversely, the programme includes 112 cities globally,[213] this data should be interpreted with particular caution. Moreover, the dataset is limited to the period from October 2024 to July 2025 and remains experimental in nature.

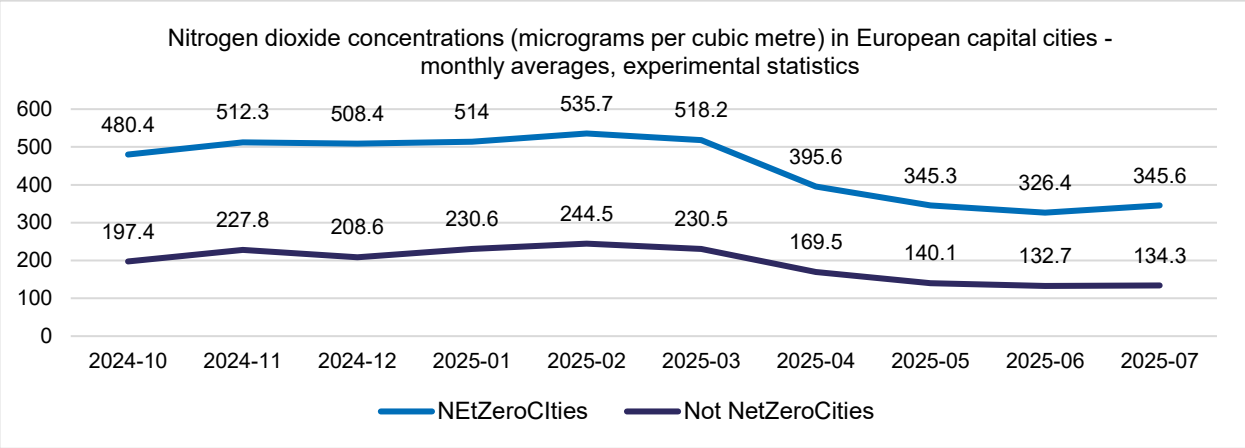
The observed differences in NO_2 concentrations are not statistically significant. During the specified timeframe, capital cities participating in NetZeroCities recorded an average decrease of 3,11% in micrograms per cubic metre, compared to a 3,34% decrease in non-NetZeroCities capitals. These changes are illustrated in Figure 41 and Table 78 below.

Table 78. Monthly changes (month to month) in nitrogen dioxide concentrations in European capital cities (NetZeroCities/not NetZeroCities)

Capitals/ Date	11.2024	12.2024	1.2025	2.2025	3.2025	4.2025	5.2025	6.2025	7.2025
NetZeroCities	+6,6%	-0,8%	+1,1%	+4,2%	-3,3%	-23,7%	-12,7%	-5,5%	+5,9%
Not NetZeroCities	+15,4%	-8,4%	+10,6%	+6%	-5,8%	-26,5%	-17,4%	-5,3%	+1,2%

Source: Ecorys, based on Eurostat[214]

Figure 41. Nitrogen dioxide concentrations (micrograms per cubic metre) in European capital cities - monthly averages, experimental statistics



[212] Capitals in NetZeroCities, included in the Eurostat statistics: Brussels, Sofia, Dublin, Athens, Madrid, Zagreb, Rome, Riga, Vilnius, Budapest, Amsterdam, Warsaw, Lisbon, Bucharest, Ljubljana, Bratislava, Helsinki, Stockholm, Reykjavik, Oslo; capitals that are not part of the NetZeroCities: Prague, Copenhagen, Berlin, Tallinn, Paris, Nicosia, Luxembourg, Valletta, Vienna, Bern.
[213] NetZeroCities. Meet the 112 Mission Cities paving the way to climate neutrality by 2030.https://netzerocities.eu/mission-cities/.
[214] Eurosat. Nitrogen dioxide concentrations in European capital cities - monthly averages, experimental statistics. https://ec.europa.eu/eurostat/databrowser/view/env_air_no2/default/table?lang=en&category=env.env_air.env_air_.

		By May 2025
		Pathways2Resilience/Mission on Adaptation to Climate Change: The Mission Climate Adaptation has received a net EU contribution of EUR 348 million, representing approximately 21% of the total funding allocated across all EU Missions. This investment supports 38 signed grants involving 973 participants. As of July 2024, the Horizon Europe component of the Mission's portfolio comprises 225 projects, with a cumulative net EU contribution of EUR 1,33 billion.[215] Within this funding, EIT Climate-KIC received EUR 23,4 million (out of a total of EUR 29,6 million, the rest of which was divided among 11 participants) to implement the P2R project.[216] P2R assists public authorities in co-designing climate resilience pathways, action plans, and investment plans using its structured RRJs and Adaptation Investment Cycle (AIC) frameworks. Participants benefit from sub-grant funding, capacity-building services, expert mentoring, peer learning, and innovation practice groups.[217] During the first 18 months of implementation, the following key results were achieved: • A learning and impact approach was drafted to engage and mobilise regions and communities for the first P2R call for applicants. This was supported by a seven-month outreach campaign that directly reached over 200 regions and communities across Europe, resulting in the selection of the first 40 regions. • The first sub-grant call was designed, launched, and completed, leading to the awarding of sub-grants for the second half of the project. • A report was produced mapping and analysing key enabling conditions for climate resilience applicable to various regional and local contexts. This will serve as the knowledge base for the upcoming Deep Dives.[218] • A catalogue review of literature on financial sources and instruments for adaptation finance was completed, alongside the development of analytical foundations for Regional Adaptation Investment Plans. These documents will support regions in advancing their resilience journeys through the RRJ framework. • Documents were developed to support regional decision-making on climate change adaptation. • Work commenced on the development of a capacity-building programme. • The P2R website was launched, serving as the key digital tool for the Pathways2Resilience initiative.[219]
		By October 2024 (first 18 months)

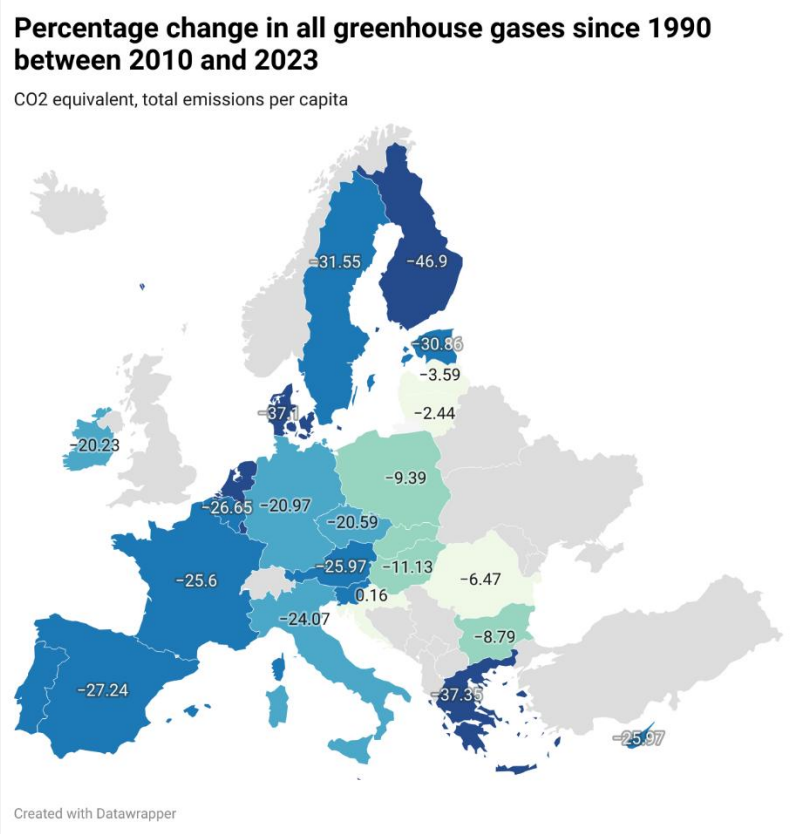
[215] European Commission/DG RTD. Horizon Europe Missions Monitoring Flash. Publications Office of the European Union; 2025. doi:10.2777/9240870. https://op.europa.eu/en/publication-detail/-/publication/f740c592-1b56-11f0-b1a3-01aa75ed71a1/language-en/.
[216] European Commission. CORDIS - EU research results. Pathways2Resilience: Co-developing pathways towards Climate resilient regions in Europe. https://cordis.europa.eu/project/id/101093942.
[217] CORDIS - EU research results. Pathways2resilience. https://www.pathways2resilience.eu/activities-and-objectives; https://cordis.europa.eu/project/id/101093942/reporting.
[218] Deep Dives are expert communities that bring together professionals from various fields to exchange knowledge on key enabling conditions for climate resilience, such as data, governance, finance, skills, and behavioural change, through regular open sessions that generate insights to support participating regions; https://www.pathways2resilience.eu/join-our-activities.
[219] CORDIS - EU research results. Pathways2resilience. https://cordis.europa.eu/project/id/101093942/reporting.

		40 regions[220]
		The **Deep Demonstrations** have delivered notable progress across three regions. • The Deep Demonstration on circular economy in Slovenia, running from late 2018 to mid-2025, has progressed through three main phases. Initially, the Slovenian government and EIT Climate-KIC co-developed a shared vision and commitment to systemic transformation. This was followed by a pre-implementation phase focused on preparing the ground for large-scale change. Since mid-2022, the implementation phase has been underway.[221] • Since 2022, the Deep Demonstration in Ireland has been working across the agri-food and bio-based value chain to bridge the gap between the country's climate commitments and on-the-ground reality. Involving hundreds of stakeholders, it coordinates solutions across four key areas: sustainable dairy farm business models, a nationwide carbon farming framework, the adoption of circular bio-economy models, and the re-imagining of land and agri-food systems for 2050. These focus areas are supported by more than 280 on-the-ground projects, developed from a detailed mapping of the agri-food system and the specific innovation pathways identified during the partnership's initial phase. The programme's two-year extension in 2024 will enable continued implementation with a wide network of national and European partners.[222] • In Gipuzkoa (Basque Country, Spain), the Deep Demonstration focuses on mobility and food as priority sectors for economic, social, and environmental transformation. Beginning in 2020, the collaboration between EIT Climate-KIC and the region applied a systems innovation approach to drive rapid decarbonisation and align local initiatives with broader European climate priorities. By 2022, the methodology was further integrated into work toward specific EU Missions. Key transformation areas include investment, capacity building, knowledge creation, inclusive governance, and sustainable business innovation to support a just and systemic transition.[223]
		2024
		3 partnering regions/countries
		While overall trends in GHG emissions remain concerning, Europe has been making consistent progress in reducing its emissions. A range of policies has contributed to this progress, beginning with structural changes following the political and economic transitions of the 1990s, and continuing with the growing impact of the European Union and its instruments, such as the Renewable Energy Directive (2023/2413; initially 2009/28/EC) and, more recently, the revised Energy Efficiency Directive (EU/2023/1791), originally adopted in 2012. It is important to acknowledge that the maturity of EU membership varies across countries, and the timeline for implementing EU climate-related regulations differs accordingly. This diversity should be taken into account when assessing progress.

[220] EIT Climate-KIC Impact Measures. Societal Indicators, October 2024.
[221] EIT Climate-KIC. Circular Slovenia: Systems innovation for the transition to a circular, regenerative and low-carbon economy. https://www.climate-kic.org/programmes/place-based-transformations/circular-slovenia/.
[222] Climate-KIC. Ireland: Systems innovation for the transition to a climate-neutral agri-food sector https://www.climate-kic.org/programmes/place-based-transformations/sustainable-food-ireland/.https://www.climate-kic.org/wp-content/uploads/2024/03/EIT-Climate-KIC-Ireland-Deep-Demonstration-press-kit-March-2024.pdf.
[223] Climate KIC. Gipuzkoa: Systems innovation and social cohesion for the transition to sustainability. https://www.climate-kic.org/programmes/place-based-transformations/gipuzkoa/.

Nevertheless, as illustrated in the graph below, GHG emissions per capita have been declining since 1990. Figure 42 below presents the percentage reduction from the 1990 benchmark between 2010 and 2023: the period from the launch of EIT Climate-KIC to the most recent available data. This demonstrates a significant decrease in emissions across countries over those 13 years.

Figure 42. Percentage change in GHG since 1990 (change between 2010 and 2023)



Source: Ecorys, based on European Environment Agency greenhouse gases data[224]

[224] European Environment Agency. Data viewer on Total greenhouse gas emissions and removals of the EU, based on data reported by EU Member States under the EU Governance Regulation. https://www.eea.europa.eu/en/analysis/maps-and-charts/greenhouse-gases-viewer-data-viewers.

Case study: Healthy Clean Cities – Leuven[225]

Initiative highlights

In 2019, EIT Climate-KIC launched its Deep Demonstration projects to test the developing methodology. Healthy Clean Cities is one of these projects, and the city of Leuven was among the first participants.

Leuven is a city located in the Flemish Brabant. In 2020, Leuven was among the first project participants to join the Healthy Clean Cities Initiative. The initiative, led by EIT Climate-KIC and active from 2020 to 2023, aimed to support European cities in achieving climate neutrality through systemic innovations. Leuven aims to leverage the initiative to enhance the implementation of its climate roadmap, Leuven 2030.

When entering the programme, Leuven already provided a climate roadmap, which was seen as ambitious back in 2019-20. However, despite acting as a leader among European municipalities in this regard, the city faced challenges in implementation due to limited budget, capacity, and personnel confidence, among other factors.

Through the initiative and fostered collaboration with EIT Climate-KIC and its consortium partners, Leuven transformed and developed in key areas to successfully implement its strategy. Leuven successfully applied several strategic experiments, such as civic contracting models, district energy transition strategies, nature-based solutions, and citizen assemblies. Consequently, the initiative was able to catalyse new funding streams for Leuven, enhance Leuven 2030, foster inhabitants' engagement through the city's climate neutrality goals, and significantly elevate Leuven's visibility across Europe.

Context and rationale

Cities occupy more than 2% of the Earth's surface but consume almost 80% of global energy[226] and produce more than 70%-80% of carbon emissions. In Europe, cities house around three-fourths of the overall population, making them central to climate action.[227] Climate change is expected to pose risks to the urban population. These risks can vary extensively, from energy, water, and food supply disruptions to natural disasters or even rapid disease outbreaks. Therefore, it is crucial for cities to enhance their resilience, health, and climate neutrality within the next few decades[228], with an emphasis on the next ten years.

Healthy Clean Cities was rooted in the realisation that traditional approaches were insufficient for cities to meet carbon-neutrality goals within the required timeframe. Many organisations need a framework for rapid, far-reaching change. EIT Climate-KIC aimed to work with mayors and municipal officials to design portfolios of innovations across the city system.

Leuven had already developed an ambitious roadmap for carbon neutrality, the strategy Leuven 2030. However, at this point, it lacks the means and capacity to implement it effectively. The city required a partner to co-create, challenge, and support its transformation journey.

Leuven's collaboration with the Healthy Clean Cities consortium began with a structured, iterative needs assessment, including strategic mapping and experimentation. This began with Leuven's 2030 alliance, which worked with EIT Climate-KIC and other consortium partners to articulate their goals and identify systemic barriers to implementing their climate roadmap. Despite the fact that the city had a well-developed strategy, it lacked the operational capacity, financial mechanisms, and simple confidence of its leaders and experts to act within the framework of the unknown. Therefore, the tools and methods implemented during the project were needed to operationalise Leuven's climate-neutral ambitions. This included exploratory mapping, strategic experimentation, and efforts to enhance the municipality's collaboration with local civil society.

EIT Climate-KIC responded by embedding a team within the city's ecosystem, conducting strategic mapping of potential interventions. These included civic contracting experiments, district energy transitions, and place-based

initiatives such as engaging businesses in the city's Research Park. The initiative aligned with EU-level ambitions, particularly the Cities Mission (see above), and helped Leuven prepare a successful application to join it.

About the initiative

The initiative was based on the authored methodology of EIT Climate-KIC – Deep Demonstration, which was developed in parallel with the programme, and consequently rooted in the experience of the Health Clean Cities, including the city of Leuven.

Contrary to many similar projects, Healthy Clean Cities was not a consultancy model but a deep partnership built on trust, knowledge transfer, and long-lasting personal relations. EIT Climate-KIC built a dedicated team to support the city, which included a project manager, city advisor, and methodology experts.

The project was built on knowledgeable, mutually complementary partners who contributed expertise in governance, finance, citizen engagement, and economic modelling. Democratic Society, which supported participatory processes and democratic innovation; Dark Matter Labs, which assisted the city in exploring governance models and policy innovations; Bankers Without Boundaries, responsible for co-designing financial instruments and strategies in support of climate action; and Material Economics, which worked on cross-city policy innovations. EIT Climate-KIC contributed expertise in governance, finance, citizen engagement, and economic modelling, each in its own area of expertise.

The project collaborated with a local alliance of municipal, academic, private, and civil society actors; the team co-created a portfolio of strategic experiments, previously involved in developing the Leuven 2030 report.

Together, within the framework of the Healthy Clean City project, the partners developed a portfolio of strategic experiments. The notable examples of the ambitious intervention for the research park initiative, which aimed to engage business stakeholders in climate neutrality efforts, and is still being developed by the city. They also developed economic models for assessing the return on investment for climate actions. They supported Leuven in applying to the EU Cities Mission, enabling peer-to-peer learning sessions with the city of Vienna.

The initiative also assists Leuven in a practical manner, such as securing funding from Bloomberg Philanthropies and two selected LIFE projects. Notably, Leuven contributed around 70–80% of the budget, demonstrating its strong commitment to a carbon-neutral city.

Societal impacts

The impact of Healthy Clean Cities in Leuven was multifaceted, as the project was thematically broad and innovative. It impacted the city and its citizens, the municipality as a separate entity, and the broader mission of EIT Climate-KIC.

The Healthy Clean City project visibly strengthened the Leuven 2030 strategy, elevating citizen participation and local civic organisations through public participation processes and assemblies. It also engaged both SMEs and large companies in the city on climate commitments.

The project and its outcomes attracted national-level partners, which brought additional funding for Leuven's next projects. They enabled further development of policies and governance innovations within the municipality's

[225] The case study is build in most part on the interview conducted with the EIT Climate-KIC representatives.
[226] C40CITIES. https://www.c40.org/what-we-do/scaling-up-climate-action/energy-and-buildings/
[227] European Commission. Cities: Making cities more sustainable. https://joint-research-centre.ec.europa.eu/jrc-highlights-report-2024/cities_en

structures and elevated Leuven's visibility at the state and international levels. Notably, its mayor is now a chair in the Cities Mission Mayors Advisory Group.

The project was also a significant driver of further development in EIT Climate-KIC's working methods. First, it enabled further development of the deep demonstration methodology, which is now an important tool within the EIT Climate-KIC toolbox, providing a replicable model for other cities to pursue climate neutrality.

Impact attribution

The indicator “number of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience” is designed to capture the foundational step in EIT Climate-KIC’s theory of change: the establishment of formal, strategic partnerships. These agreements (whether collaboration agreements, Memoranda of Understanding, or contracts) represent a direct output of EIT Climate-KIC’s engagement and outreach activities and also serve as an enabler for subsequent climate action. By formalising intent and commitment, these partnerships lay the groundwork for joint initiatives, resource mobilisation, and systemic interventions that are expected to drive decarbonisation and resilience outcomes at scale.

The logic underpinning this indicator is that without such agreements, coordinated and impactful climate action would be less likely. Thus, the indicator is closely linked to the expected impact, not by measuring the outcomes themselves, but by establishing the necessary conditions for those outcomes to emerge. Importantly, the targets for this indicator were not only met but exceeded. By 2024, EIT Climate-KIC reported a cumulative total of 43 collaboration agreements, surpassing the target of 30 set for that year and making strong progress towards the 2027 target of 50.

While this achievement does not in itself prove impact, it strengthens the attribution case by demonstrating that EIT Climate-KIC’s activities have successfully produced the intended outputs at scale and within the expected timeframe. This reinforces the credibility of the indicator as a direct measure of organisational effectiveness in mobilising partnerships.

Table 79 below presents and details the methodology for understanding attribution for this indicator. It explains how the indicator is linked to EIT Climate-KIC’s activities, the type of attribution, the evidence robustness and the main caveats and limitations.

Table 79. Impact attribution "# of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience.	This indicator reflects the number of formal agreements (MoUs, contracts, collaboration agreements) signed between EIT Climate-KIC and local actors (cities, regions, challenge owners). These agreements are direct outputs of EIT Climate-KIC's strategic activities aimed at enabling place-based innovation for climate action. This directly reflects EIT Climate-KIC's efforts to establish partnerships for rapid decarbonisation and resilience, as each agreement is a result of those efforts.	**Direct attribution** – input indicator	**High –** based on formal documentation and internal records maintained by EIT Climate-KIC. The agreements are traceable and verifiable, and directly result from EIT Climate-KIC's activities.	**Scope limitation**: The indicator measures the establishment of partnerships, not their effectiveness or the outcomes they generate. The quality, ambition, and implementation of agreements may vary significantly across locations and partners. **External factors**: Political will, local capacity, and partner follow-through influence whether agreements lead to meaningful climate impact. **Attribution complexity**: While attribution is direct for the agreements themselves, it does not extend to downstream outcomes such as decarbonisation or resilience.

4.1.3.2 Climate-friendly jobs created or sustained

Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations.

Building a resilient, climate-focused economy requires a skilled workforce capable of designing, implementing, and scaling solutions across renewable energy installations, sustainable agriculture, and green technologies. Globally, the surge in climate technologies has become a powerful engine for employment growth.[229] EU climate change mitigation policies, which aim to reduce greenhouse gas emissions by 55% by 2030 (Fit for 55)[230], will significantly impact labour markets and the demand for skills. Employment is expected to shift towards low-emission sectors, such as services and renewable energy, and away from energy-intensive industries. Projections indicate a sharp increase in demand for workers who can effectively harness technological innovations.[231]

Achieving green objectives while sustaining employment in the EU will rely heavily on the adoption of digital technologies and productivity gains linked to their use. The digital transition is therefore a critical enabler of the green transition. Demand is expected to rise for skills in interpersonal communication and digital technology use, with particularly strong growth projected for competencies such as computer interaction, web platform development, operating system management, and the use of analytical or scientific software applications.[232]

The EIT Climate-KIC's SA links job creation directly to connecting fast-growing start-ups with the market-making and market-shaping activities of EU Missions. It identifies the need for new employment to meet the demands of the net-zero transition, circular economy innovation, and climate resilience. Addressing climate change is framed as both an environmental imperative and an opportunity to generate high-value jobs, particularly in the context of COVID-19 recovery and job losses.

The SA also acknowledges that green job creation is a priority for many Member States under the Next Generation EU programme.[233] Providing new jobs through support for start-ups has been and continues to be achieved through various streams of activity. However, in light of the operational shift within EIT Climate-KIC and the current focus on its two flagship projects: NetZeroCities and P2R, the approach to generating green jobs has also been refocused. This adjustment in how the impact is to be achieved is understandable given the strategic realignment. Since 2023, EIT has not been funding business creation/scale-up activities within EIT Climate-KIC.[234] To this point, the main activities were as follows:

- **ClimAccelerator** is a global programme designed to scale and accelerate climate-positive start-ups through collaboration and resource sharing. The ClimAccelerator partnership network is supported by a comprehensive ecosystem, developed over more than ten years through the ClimAccelerator Operating System. It provides start-ups with access to tools and networks to innovate, catalyse, and scale their climate solutions within a global community of organisers running both theme-based and place-based acceleration programmes.
- **ClimAccelerator** facilitates connections between businesses, climate impact technologies, and partners to support industry transformation, in line with the European Green Deal and the Paris Agreement. EIT

[229] E.g. European Commission. Employment and Social Developments in Europe 2019. Chapter 5: Towards a greener future-–employment and social impacts of climate change policies. Brussels: Commission Staff Working Document; July 4, 2019. SWD (2019) 294 final. https://data.consilium.europa.eu/doc/document/ST-11082-2019-ADD-5/en/pdf.
[230] European Council. Council of the European Union. Fit for 55. https://www.consilium.europa.eu/en/policies/fit-for-55/.
[231] Borgonovi F, et al. The effects of the EU Fit for 55 packages on labour markets and the demand for skills. OECD Social, Employment and Migration Working Papers. 2023;(297). OECD Publishing. doi:10.1787/6c16baac-en. https://www.oecd.org/en/publications/the-effects-of-the-eu-fit-for-55-package-on-labour-markets-and-the-demand-for-skills_6c16baac-en.html.
[232] Ibid.
[233] EIT Climate-KIC Strategic Agenda 2021-2027.
[234] EIT Climate-KIC Business Plan 2023-2024.

Climate-KIC has also developed an investment strategy known as the services-for-equity agreement (SFEA), which provides services such as carbon impact forecasting and monitoring, fundraising support, EU policy guidance, cap table management and commercialisation support in exchange for equity.[235]

- **Climathon** is a 24-hour global climate change hackathon held annually simultaneously across major cities worldwide. It brings together innovators, entrepreneurs, students, and professionals to develop innovative solutions to climate challenges. Climathon engages cities and citizens to drive change and accelerate the transition to a zero-carbon, climate-resilient society. Its objectives include raising awareness of local climate challenges, providing climate-relevant learning opportunities, strengthening local ecosystems, and inspiring further climate action.[236]
- **ClimateLaunchpad** is an incubator programme designed to support the development of climate-focused business ideas. It operates through a global competition for green business concepts. The programme aims to facilitate the commercialisation of early-stage cleantech solutions by providing participants with structured training, mentorship, coaching, networking opportunities, and additional support mechanisms.[237]

The current SA further emphasises that growth in green jobs will be achieved not only through those dedicated programmes but also through a shift in focus that aligns employment generation with broader innovation efforts. This includes matching fast-growing start-ups with the market-making and market-shaping activities of EU Missions, as described in the section above, as well as positioning portfolios linked to Deep Demonstrations (also included above) as catalysts for short-term job creation.[238]

Therefore, the impact under this indicator should be considered within the broader context of EIT Climate-KIC operations. The objective is not solely to generate new jobs through direct support of start-ups (an activity no longer financed by the EIT) but also to enable job creation by facilitating connections between ventures and the partners and participants involved in ongoing initiatives related to EU Missions and Deep Demonstrations.

The following Table 80 provides an overview of the impacts achieved for KPI Combined # new jobs

[235] EIT. Catalogue of EIT KICs Business Creation (BC) Programmes 2022–2023. Last updated February 2023. https://www.eit.europa.eu/sites/default/files/final_-_accepted_tc_-_bc_catalogue_2022-23_2.pdf; EIT. Catalogue of EIT KICs Business Creation Programmes 2021–2022. Last updated March 1, 2022. https://www.eit.europa.eu/sites/default/files/eit_kics_bc_programme_catalogue_0.pdf.
[236] Ibid.
[237] Ibid.
[238] EIT Climate-KIC Strategic Agenda 2021-2027.

Table 80. Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations

<table>
<tr><th>Impact indicators</th><th>Targets</th><th>Impacts achieved</th></tr>
<tr><td># Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations</td><td>20 000 by 2024
50 000 by 2027[239]</td><td>The Dealroom data, which serves as the source of information for this indicator, includes employment figures for ventures supported by EIT Climate-KIC. The number of reported employees in companies created or supported during the period 2016–2025 is presented below. However, the dataset has methodological limitations, which are discussed in Annex 2 on economic impact indicators.
Specifically, the type of support provided by EIT Climate-KIC is not specified. There is no available data on employment in ventures that received different forms of support, particularly distinguishing between accelerators, incubators, Climathon, and networking opportunities facilitated by EIT Climate-KIC projects within the EU Missions. Thus, it is impossible to directly associate the reported employment figures with the aforementioned programmes and projects.
At the same time, EIT Climate-KIC reports that, based on the same Dealroom database, over 20 000 jobs were supported by 2024 through its entrepreneurship activities.[240] This figure exceeds the 2024 target. The reason for the discrepancy between the two findings remains unclear.
<table>
<tr><th>2016</th><th>2017</th><th>2018</th><th>2019</th><th>2016</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th><th>2024</th><th>2025</th></tr>
<tr><td>49</td><td>59</td><td>1 475</td><td>4 947</td><td>49</td><td>6 188</td><td>9 954</td><td>18 653</td><td>22 295</td><td>19 139</td><td>18 871[241]</td></tr>
</table>
Employment in the EU’s environmental economy has grown significantly over the past two decades, outpacing overall employment growth. Between 2000 and 2022, the sector expanded from 3,0 million to 6,7 million FTEs, averaging annual growth of 3,7%. Within the environmental goods and services sector, employment rose from 2,1% of total EU employment in 2010 to 2,5% in 2021, reaching 5,2 million FTEs.
This expansion was driven primarily by job creation in renewable energy, energy efficiency, and waste management, with employment in the management of energy resources increasing by a factor of 4,3 since 2000, and waste management also showing substantial growth. From 2010 to 2021, the sector’s share of total EU employment grew by 0,4 percentage points (an increase of 1,1 million FTEs), representing a 25% rise compared with just 7% for the EU’s overall economy, underscoring the sector’s increasing contribution to both employment and economic value added.[242]</td></tr>
</table>

[239] Ibid.
[240] EIT Impact report 2024. Internal data.
[241] Dealroom data discussed in-depth in Chapter 2 Economic Impact Analysis.
[242] European Environment Agency. (2025). Employment in the environmental goods and services sector in Europe. https://www.eea.europa.eu/en/analysis/indicators/employment-in-the-environmental-goods, Eurostat. Environmental economy – statistics on employment and growth and Eurostat. (2025). Environmental economy – statistics on employment and growth. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Environmental_economy_%E2%80%93_statistics_on_employment_and_growth.

Impact attribution

The combined indicator on # *new jobs created in start-ups/scale-ups*, and # *jobs/employment in existing businesses, partners sustained through innovations,* is intended to reflect the economic and societal impact of EIT Climate-KIC's support for entrepreneurship and innovation. As detailed in Table 80 above, employment in the EU's environmental goods and services sector has grown significantly over the past two decades, outpacing overall employment growth. According to the Dealroom database, EIT Climate-KIC reports that over 21 000 jobs were supported by 2024, which aligns with the broader growth trend in the green economy.

This overall growth across the EU has been driven by a combination of factors, including EU-wide policies (e.g. the European Green Deal and the Eighth Environment Action Programme), national and regional programmes supporting clean energy, circular economy, and sustainable infrastructure and EU funding instruments (e.g. Horizon Europe, the LIFE Programme and the Just Transition Fund). External drivers, such as technological innovation, changing consumer preferences, and global climate commitments, have also played a significant role in driving green job creation.

Hence, while EIT Climate-KIC has made a meaningful contribution to supporting climate-friendly jobs through its entrepreneurship and innovation activities, the overall growth in green employment in the EU results from a complex interplay of programmes, policies, and market forces. Attributing the total observed employment growth to EIT Climate-KIC alone would not be accurate or methodologically sound, as the available data does not distinguish between types of support or link employment outcomes to specific programmes, making direct attribution difficult to prove.

Table 81 below presents and details the methodology for understanding attribution for this indicator. It explains how the indicator is linked to EIT Climate-KIC's activities, the type and confidence of attribution, and the main caveats and limitations.

Table 81. Impact attribution "Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations	This indicator is designed to track progress toward EIT Climate-KIC's overarching goal of accelerating the transition to a climate-resilient, low-carbon economy. By aggregating employment figures from ventures supported by EIT Climate-KIC, it reflects the organisation's role in enabling job creation and sustaining employment through innovation support. The creation and maintenance of climate-friendly jobs are key pathways to achieving systemic change and societal impact, which align with EIT Climate-KIC's mission.	**Contribution** – EIT Climate-KIC's activities are one of several contributing factors to observed employment outcomes. The indicator reflects the organisation's supportive role in enabling job creation and sustaining employment through innovation, but does not imply exclusive causality.	**Moderate –** based on employment figures drawn from Dealroom data and EIT Climate-KIC's internal reporting. However, the data lack granularity on the type, intensity, and timing of support provided and do not include follow-up information linking employment outcomes to specific interventions.	**Attribution complexity**: Ventures supported by EIT Climate-KIC often benefit from multiple sources of support, including EU programmes, national and regional agencies, private investors, and other EIT KICs. This layered support environment makes it difficult to isolate EIT Climate-KIC's specific contribution to employment outcomes. **Limited granularity**: The dataset does not differentiate between types of support provided (e.g. funding, mentoring, networking), nor does it specify the timing or duration of engagement, which limits the ability to assess the depth and relevance of EIT Climate-KIC's involvement. **Methoological limitations**: Employment figures are based on Dealroom data and internal reporting, without independent verification or standardised attribution pathways. There is no follow-up data linking job creation or retention to specific EIT Climate-KIC interventions. **External factors**: Broader market conditions, national labour policies, and co-funding from other actors also significantly shape employment outcomes.

4.1.3.3 Funding leveraged to support scale-up / diffusion of innovations to tackle climate change

Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change.

Since 2010, the EU has established an ambitious policy architecture that combines targets, such as climate neutrality, with substantial funding programmes, collaborative platforms, and enabling regulations, all aimed at scaling up climate innovation. These frameworks are most notably, but not limited to, the European Green Deal, Horizon 2020, Horizon Europe, and the abovementioned EU Missions. They work together to help deploy new technologies, expand market opportunities for green solutions, and drive the broader transformation of the economy toward sustainability. EIT Climate-KIC's operational and financing approach complements the EU's broader policy and funding architecture for scaling climate innovations by serving as a catalyst and connector between innovation design and investment.

European Green Deal, launched in 2019 as the EU's new growth strategy, provides the strategic umbrella under which research, innovation, investment, and regulation are coordinated. It sets an overarching policy framework to transform Europe into the first climate-neutral continent by 2050 and a legally binding target of net-zero greenhouse gas emissions by 2050 (enshrined in the European Climate Law) and raised the EU's 2030 emissions reduction goal to at least 55% below 1990 levels (e.g. aforementioned legislative package "Fit for 55").

The Green Deal's objectives span every sector, clean energy, sustainable industry, buildings, mobility, agriculture, and biodiversity, in a 'whole-economy' transition for sustainability. This framework further responds to citizens' urgent calls for climate action and is designed to be "economically sound and socially fair".[243]

In terms of financing, key achievements to date include the implementation of NextGenerationEU and REPowerEU, which together have mobilised approximately EUR 275 billion in clean investments, with 42% of funds allocated to climate-related actions. The Just Transition Fund has allocated nearly EUR 20 billion to support economic diversification and workforce reskilling in regions vulnerable to the impacts of decarbonisation.[244] The Social Climate Fund is expected to mobilise at least EUR 86,7 billion in public funding over the 2026–2032 period, aimed at supporting vulnerable households in improving energy efficiency, adopting clean heating solutions, and accessing sustainable transport.[245] The EU Solidarity Fund and the EU Civil Protection Mechanism provide financial and operational support to countries within and beyond Europe in response to climate-related emergencies.[246]

The EU's primary mechanism for funding climate innovation has been competitive grants under the Framework Programmes. **Horizon 2020** (2014–2020), the EU's eighth Framework Programme for Research and Innovation, with nearly EUR 80 billion in funding, and **Horizon Europe** (2021–2027), the ninth Framework Programme for R&I, with an increased budget of about EUR 95 billion. These laid the groundwork and have provided support for climate innovation deployment. Horizon 2020 (2014–2020) aimed to boost Europe's global competitiveness through research and innovation while tackling major societal challenges, including climate change.

Built on three pillars: Excellent Science, Industrial Leadership, and Societal Challenges, it allocated 35% of its budget to climate-related projects, investing around EUR 20 billion in areas such as clean energy, sustainable transport, and climate science, including a EUR 1 billion "Green Deal" call in 2020. By its final years, calls were

[243] European Commission. The European Green Deal. Striving to be the first climate-neutral continent. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en.
[244] Ibid.
[245] Ibid.
[246] Ibid.

explicitly aligned with the Paris Agreement.[247] Horizon Europe (2021–2027) sharpens the focus on the green and digital transitions, with climate innovation concentrated in Pillar II, Cluster 5: Climate, Energy and Mobility, and scaling support through the EIC in Pillar III and subsequently establishing the EIC Accelerator.[248]

Both Horizon schemes have advanced public–private partnerships through Joint Undertakings that combine EU and industry funding to co-develop and commercialise technologies across sectors such as hydrogen, batteries, aviation, and sustainable manufacturing.[249] Beyond grants, the EU has established financing instruments to bridge the "valley of death" and mobilise large-scale investment in the deployment of climate innovations. A key example is the **EU Innovation Fund**, launched in 2020 under the EU Emissions Trading System. Financed through revenues from carbon allowances, it is among the largest global funding programmes dedicated to demonstrating innovative low-carbon technologies.

The Innovation Fund is expected to provide approximately EUR 40 billion in grants over the 2021–2030 period to support commercial-scale demonstrations of clean technologies, with the objective of bringing industrial solutions to market for deep decarbonisation.[250] In addition, the EIB, European Fund for Strategic Investments (EFSI) and its successor, InvestEU, provide specific instruments to tackle climate action.

Within EIT Climate-KIC's monitoring framework, the KPI "Funding leveraged to support scale-up/diffusion of innovations to tackle climate change" measures the total amount of financial resources mobilised by partners or partner communities as a direct result of collaborative work with EIT Climate-KIC.[251] It focuses specifically on funding attributable to EIT Climate-KIC's involvement, rather than all climate-related expenditures by a partner or within a partner's jurisdiction.

Multiple scenarios are possible, including but not limited to:

- Project implementation, where EIT Climate-KIC is directly involved and actively engaged in mobilising resources for the implementation of a project or portfolio.
- Portfolio development support, where EIT Climate-KIC supports partners in developing portfolios, resulting in committed funding for activities within the portfolio, although EIT Climate-KIC is generally not involved in implementation.
- External funds are leveraged to complement funding provided by EIT Climate-KIC or as a result of collaboration with EIT Climate-KIC.[252]

In the context of NetZeroCities, leveraged funding may occur when participating cities, after developing Climate CCCs or Climate Action Plans with EIT Climate-KIC support, secure financing to implement these plans. This financing may come from increased municipal budgets, other EU programmes, or private sources.

The NetZeroCities Capital Hub[253] contributes by facilitating connections between cities and investors and by providing technical assistance. Any resulting mobilised capital is counted under this indicator. Under the P2R

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[247] E.g. https://climate-adapt.eea.europa.eu/en/eu-adaptation-policy/funding/h2020, European Commission. Ex post evaluation of Horizon 2020, the EU framework programme for research and innovation. Brussels: European Commission; 2024 Jan 29. Report No.: COM(2024) 49 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=COM%3A2024%3A49%3AFIN&qid=1706527941657.
[248] E.g. https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en, https://eic.ec.europa.eu/about-european-innovation-council_en.
[249] European Commision. EUR-LEX. 2021. Public–private partnerships under Horizon Europe. SUMMARY OF:Regulation (EU) 2021/2085 establishing the joint undertakings under Horizon Europe
https://eur-lex.europa.eu/EN/legal-content/summary/public-private-partnerships-under-horizon-europe.html.
[250] European Commision. https://climate.ec.europa.eu/eu-action/eu-funding-climate-action/innovation-fund_en, https://climate.ec.europa.eu/eu-action/eu-funding-climate-action/innovation-fund/what-innovation-fund_en.
[251] EIT Climate-KIC Impact Measures, Societal Indicators, October 2024.
[252] Ibid.
[253] NetZeroCities. The Climate City Capital Hub. https://netzerocities.eu/wp-content/uploads/2024/06/Capital-Hub-2-pager_FINAL.pdf.

programme, regions that secure financing for resilience pathways through EIT Climate-KIC-supported processes also contribute to the leveraged funding figure.[254]

Therefore, the following impact, euros leveraged, is a self-assessment of the EIT Climate-KIC based on its internal monitoring data.

The following Table 82 provides an overview of the impacts achieved for KPI Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change.

[254] EIT Climate-KIC Impact Measures, Societal Indicators, October 2024.

Table 82. Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change

<table>
<tr><th>Impact indicators</th><th>Targets</th><th>Impacts achieved</th></tr>
<tr><td>Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change.</td><td>EUR 30bn by 2024
EUR 100bn by 2027[255]</td><td>Considering the KPI [EITHE06.1] "Investment attracted by KIC-supported start-ups and scale-ups Total EUR amount of private and public capital attracted within year N by supported start-ups/scale-ups that have received KIC business creation services support or HEI CBI project support" for the period 2017–2024, the cumulative validated investment attracted by ventures reached EUR 1,19 billion.

Annual investment attracted in million EUR:
<table>
<tr><th>2017</th><th>2018</th><th>2019</th><th>2020</th><th>2021</th><th>2022</th><th>2023</th><th>2024</th></tr>
<tr><td>203</td><td>130</td><td>116</td><td>515</td><td>93</td><td>39</td><td>46[256]</td><td>51</td></tr>
<tr><td colspan="8">Cumulative by 2024</td></tr>
<tr><td colspan="8">EUR 1,19 billion[257]</td></tr>
</table>
Within the EU’s climate innovation landscape, shaped by the instruments introduced above, EIT Climate-KIC focuses on mobilising and leveraging capital to turn plans into action. In this capacity, EIT Climate-KIC acts as a bridge between the EU’s strategic climate innovation objectives and the financial flows required for deployment, supporting the transformation of plans developed within EU frameworks into bankable and implementable projects on the ground.

EIT Climate-KIC has not yet been able to fully report against the leverage target, as the EU Missions Capital Hubs, which were intended to mobilise large-scale finance for cities pursuing net-zero targets, were only established in 2023/24. EIT Climate-KIC has now received investment plans from NetZeroCities outlining the financial requirements for the planned transformations, amounting to approximately EUR 650 billion over the next six years.[258]</td></tr>
</table>

[255] EIT Climate-KIC Strategic Agenda 2021-2027.
[256] EIT monitoring data (EITHE06.1).
[257] Ibid.
[258] EIT Climate-KIC Impact Measures, Societal Indicators, October 2024.

Impact attribution

The indicator “euros leveraged to support the scale-up/diffusion of innovations to tackle climate change” is designed to capture EIT Climate-KIC’s role in mobilising financial resources for climate innovation. It aligns with the organisation’s overarching goal of enabling systemic change by connecting climate-focused ventures with the capital needed to scale their solutions.

As described in Table 82 above, for the period 2017–2024, the cumulative validated investment attracted by supported ventures reached approximately EUR 1,19 billion. However, the indicator does not distinguish between types or timing of support, nor does it account for other sources of investment or market drivers. In practice, many ventures supported by EIT Climate-KIC also receive funding from other actors, including EU programmes such as Horizon Europe, the LIFE Programme, and the Just Transition Fund; national and regional innovation agencies; private investors such as venture capital and impact funds; and other EIT KICs, such as EIT Digital or EIT InnoEnergy.

This multi-source funding environment is typical of the climate innovation ecosystem, where ventures often benefit from layered support across public and private sectors. EIT Climate-KIC plays a catalytic role in helping ventures become investment-ready and connect with broader financial networks. However, the presence of multiple contributors makes it difficult to isolate EIT Climate-KIC’s unique impact on the total capital mobilised. As such, the indicator reflects a contribution rather than a direct attribution, capturing EIT Climate-KIC’s enabling role within a wider landscape of financial mobilisation.

Table 83 below presents and details the methodology for understanding attribution for this indicator. It explains how the indicator is linked to EIT Climate-KIC’s activities, the type and confidence of attribution, and the main caveats and limitations.

Table 83. Impact attribution "Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change	This indicator is designed to capture progress towards EIT Climate-KIC's overarching goal of accelerating climate innovation by mobilising large-scale capital. By aggregating the total investment attracted by ventures supported through EIT Climate-KIC's business creation services and related programmes, it reflects the organisation's catalytic role in enabling the financial flows necessary for scaling climate solutions. Building a robust investment pipeline is essential to translating climate innovation into real-world impact. However, because ventures often receive layered support from multiple sources, the indicator cannot isolate EIT Climate-KIC's unique impact; rather, it demonstrates its contribution to the broader mobilisation of capital for climate action.	**Contribution** – EIT Climate-KIC's activities are one of several contributing factors to the mobilisation of capital; the indicator captures its enabling and catalytic role, but not exclusive causality	**Moderate –** figures are based on internally reported investment data, which lack methodological transparency and granularity. The data do not specify the type, intensity, or timing of support received, nor do they link investment outcomes to specific interventions.	**Attribution complexity**: Ventures typically receive layered support from various sources, including EU programmes (e.g. Horizon Europe, LIFE Programme, Just Transition Fund), national and regional innovation agencies, private investors, and other EIT KICs. This shared funding environment makes it difficult to isolate Climate-KIC's specific contribution to the total capital mobilised. **Limited granularity:** The dataset does not differentiate between types of support provided or specify the timing, intensity, or duration of engagement with each venture. **Methodological limitations**: The indicator relies on internal monitoring and self-reported figures, without independent verification or standardised attribution pathways. Additionally, there is no follow-up data linking investment outcomes to specific Climate-KIC interventions, which constrains long-term impact assessment. **External factors**: Broader market trends and external policy instruments also significantly shape investment flows, further complicating attribution to Climate-KIC alone.

4.2 EIT Digital

According to its Strategic Agenda 2021-2027, EIT Digital describes its mission as contributing to a competitive, inclusive, fair, and sustainable digital Europe, with the ambition to generate global impact through European innovation, supported by entrepreneurial talent and digital technology. It operates as a pan-European, multi-stakeholder innovation ecosystem that brings together corporations, SMEs, startups, universities, and research institutes. Within this ecosystem, students, researchers, engineers, business developers, and investors collaborate to address the technological, skills, business, and capital requirements of digital entrepreneurship.

EIT Digital's activities focus on supporting the creation of new digital ventures, products, and services and fostering digital entrepreneurial talent by providing access to technology, expertise, and growth support.[259]

EIT Digital's strategic objectives for the period 2021–2027 focus on strengthening Europe's position in the global digital sector and increasing the impact of European innovation. They respond to persistent challenges, including fragmentation of the Digital Single Market, underinvestment in private sector R&D, and gaps in digital skills and entrepreneurial capacity:

- EIT Digital aims to foster a stronger European digital ecosystem by leveraging the diversity and complementarities of its partners. The objective is to support the emergence of globally competitive digital companies from Europe, countering the current dominance of firms from the United States and Asia.
- A key priority is to address persistent fragmentation across EU Member States. Dedicated actions are being taken in RIS countries, which typically have lower levels of innovation activity, while maintaining support for digital innovation throughout the EU. Strengthening the Digital Single Market is expected to create new opportunities for entrepreneurship and increase employment in the digital sector.
- Europe's digital research base is strong, but private sector investment in R&I remains limited compared to competitors in the US and Asia. EIT Digital's objective is to stimulate industry engagement and accelerate the uptake and commercialisation of deep tech research in areas such as artificial intelligence, cybersecurity, and advanced networks.
- A digitally skilled workforce is recognised as fundamental to Europe's competitiveness. EIT Digital therefore supports higher education and professional training systems that can deliver entrepreneurial digital skills. Efforts are underway to scale entrepreneurial education across European higher education institutions, particularly in the context of the Higher Education Initiative. A cross-cutting priority is the promotion of gender equality, with specific actions aimed at addressing women's underrepresentation in the digital sector.
- Finally, EIT Digital seeks to reinforce Europe's capacity to influence the development of digital technologies, standards, and regulations. The objective is to embed European values, such as inclusiveness, fairness, and sustainability, are embedded in digital technologies and their governance, thereby contributing to European digital sovereignty.[260]

EIT Digital leads the AI Challenge 2025, an initiative aiming to enhance the use of AI solutions across various industries and the public sector.[261] Those strategic objectives are operationalised with linked intended impacts by

[259] EIT Digital Strategic Agenda 2021-2027.
[260] Ibid.
[261] EIT Artificial Intelligence Community - Boosting AI in Europe

2027 and are provided in the Strategic Agenda, which is summarised (societal impacts only) in the table in Annex 3.

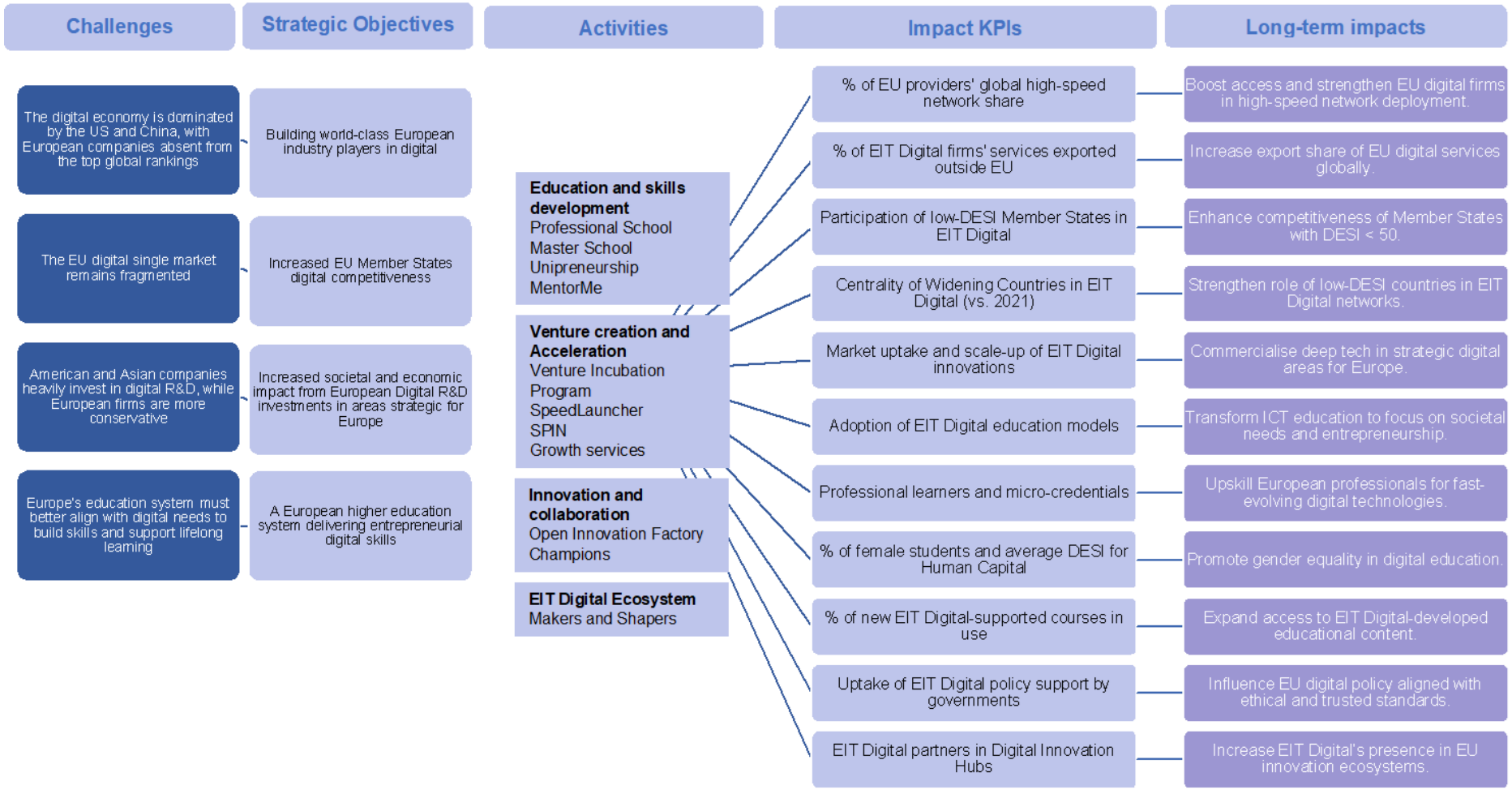
4.2.1 Impact pathway

Figure 43 presents a simplified Theory of Change, or impact pathway, based on the EIT Digital Strategic Agenda 2021–2027 and the insights gathered during the workshop with the KIC. It shows how EIT Digital addresses key societal challenges through strategic objectives and targeted activities, leading to measurable impacts by 2027.

The pathway links objectives such as building world-class European digital industry players, increasing the competitiveness of EU Member States, bringing deep tech R&I results to market, and strengthening digital talent and education systems. For example, EIT Digital promotes the export of European digital services, drives the uptake of innovations in areas such as digital industry and wellbeing, and expands access to ICT education through its Master's and Doctoral Schools.

The expected impacts are expressed both through impact KPIs, such as the share of EU firms in global digital markets, the turnover of innovative digital products, and the number of learners benefiting from new training opportunities, and through long-term outcomes like improved digital competitiveness across Member States, enhanced societal benefits from R&D investments, and embedding European values in the digital transition.

Figure 43. EIT Digital – impact pathway



Source: Ecorys

4.2.2 Overview of the main achievements

Key achievements[262]

- ✓ **692 products and services launched (exceeding the targets).**
- ✓ **440+ partners engaged.**
- ✓ **784 start-ups and scale-ups supported.**
- ✓ **15 000 direct and indirect jobs created since 2010.**
- ✓ **35% increase in partnership projects in 2024.**

EIT Digital, established in 2009, is focused on strengthening Europe's digital competitiveness and quality of life. Its mission is to bridge the gap between research and innovation, accelerate market uptake of digital technologies, and build a strong, inclusive, and sustainable digital Europe. Over the 2010-2024 period, EIT Digital received EIT grants worth EUR 584 million and developed one of the largest digital innovation ecosystems in the EU, with over 440 partners. The KIC increased the presence of its partners among European Digital Innovation Hubs by 50% by 2024, strengthening the digital innovation ecosystem.

EIT Digital has made significant contributions to Europe's digital transformation, innovation, and talent pipeline. It has surpassed many of its targets in innovation, entrepreneurship, and skills development while also advancing inclusion, gender equality, and financial sustainability. Its pan-European and global ecosystem, effective leverage of public and private funding, and alignment with EU priorities have established EIT Digital as a key driver of digital competitiveness and societal impact in Europe:

- EIT Digital launched 692 products and services onto the market between 2014 and 2024. It has significantly advanced the adoption and commercialisation of deep tech across strategic areas, including Digital Tech, Digital Cities, Digital Industry, Digital Wellbeing, and Digital Finance.
- The KIC supported 784 start-ups and scale-ups, surpassing its targets. These ventures attracted over EUR 724 million in investment (2017-2024), with 85% of supported companies still trading three years after support ended. Approximately 15 000 direct and indirect jobs have been created since 2010, far exceeding targets.
- EIT Digital excelled in engaging underserved regions through the RIS, exceeding targets for start-up creation and investment attraction in countries with lower Digital Economy and Society Index (DESI) scores. Its venture programme attracted applications from 20+ countries, with 44 new ventures established in RIS countries in 2024 alone.[263]

The Open Innovation Factory and Venture Programmes contributed to a growing portfolio, with about 80 new equity positions added in 2023-2024, bringing the total to around 350 by the end of 2024. The overall valuation of

[262] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025; The overview of the core KPIs is provided in the Annex 4.
[263] Summarising Startups created of innovation projects in RIS countries (EITHE04.2) and Startups created by students in RIS countries (EITHE05.2)

EIT Digital's equity portfolio companies is projected to exceed EUR 400 million, reflecting increased value generation and investment attractiveness.

While EIT Digital fell slightly short of its ambitious targets for graduates from EIT-labelled programmes (2 503 vs. 2 761 targeted for 2021-2023), it made significant progress in developing digital talent. The Master School and Professional School produced 2246 graduates in 2023, with 36% women's participation, moving towards a 40% target. EIT Digital exceeded its targets for non-degree education and training, with 13 324 participants in 2021-2024 versus a target of 11 850. Online learning[264] also grew, with 472 000 learners reported in 2023. As per the strategic agenda, Digital targeted 1700 graduates from EIT-labelled programmes for 2021-2024 and exceeded the target with a total of 1799.

EIT Digital contributed to increased access to high-speed networks, supported the adoption of innovative digital technologies, and promoted exports of digital services by EU firms. **In 2023, 40% of services from EIT Digital-associated firms were exported to non-EU markets, double the 20% target**.

The KIC increased participation from Widening Countries and those with DESI scores below 50, meeting its target of 100% increased centrality for these countries in its activities. In addition, women's participation in education programmes reached 36%, with 50% women recruited in the Industrial Doctoral Programme in 2021.

For every EUR of EIT funding, EIT Digital attracted nearly EUR 5 in external investment (leverage factor 4,76, including co-investments in supported start-ups). In preparation for the phasing out of EIT funding, it has diversified its income sources, relying on membership fees, tuition fees, equity stakes in ventures, and building substantial financial reserves.

EIT Digital operates 23 offices across Europe and hubs in Silicon Valley and London, thereby expanding its global engagement and supporting the internationalisation of EU digital firms.

EIT Digital is also active in promoting policy and societal values. It actively supports the development of EU regulation and standards in areas such as AI ethics and data protection, and aligns its educational content with these priorities.

4.2.3 Selection of societal impacts

4.2.3.1 Increased competitiveness of EU Member States

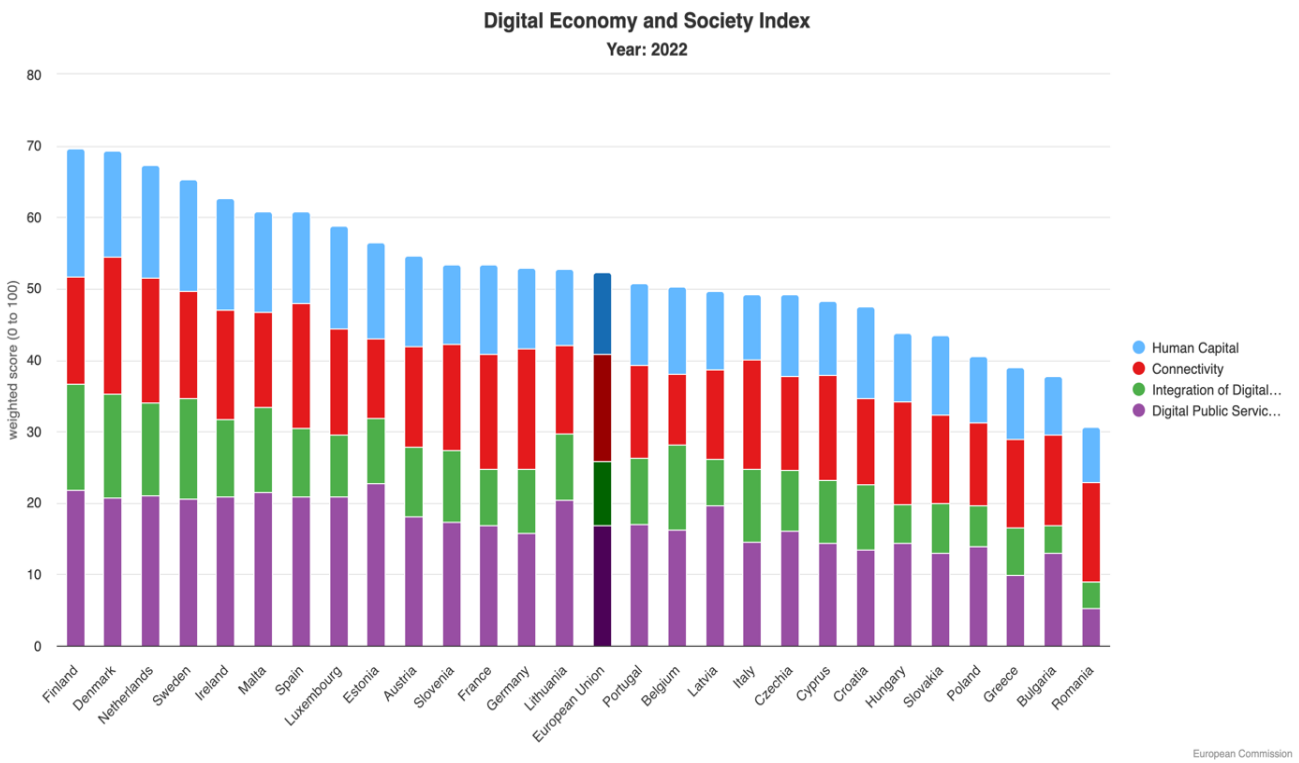
Increased competitiveness of EU Member States with a special focus on countries with a DESI (Digital Economy and Society) <50

Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through RIS programme). From 2014 to 2022, the European Commission used the Digital Economy and Society Index (DESI) to track the digital progress of EU Member States. Starting in 2023, DESI has been incorporated into the broader State of the Digital Decade report, aligning with the goals of the Digital Decade Policy Programme 2030. This integration aims to streamline monitoring and better assess progress toward the EU's long-term digital targets.

[264] Primarily via Deep Tech Talent Initiative.

The DESI composite index, in place until 2022, demonstrated the progress of the EU MS in their digitalisation, focusing on four main components: human capital, connectivity, integration of digital technology, and digital public service (Figure 44).

Figure 44. DESI 2022

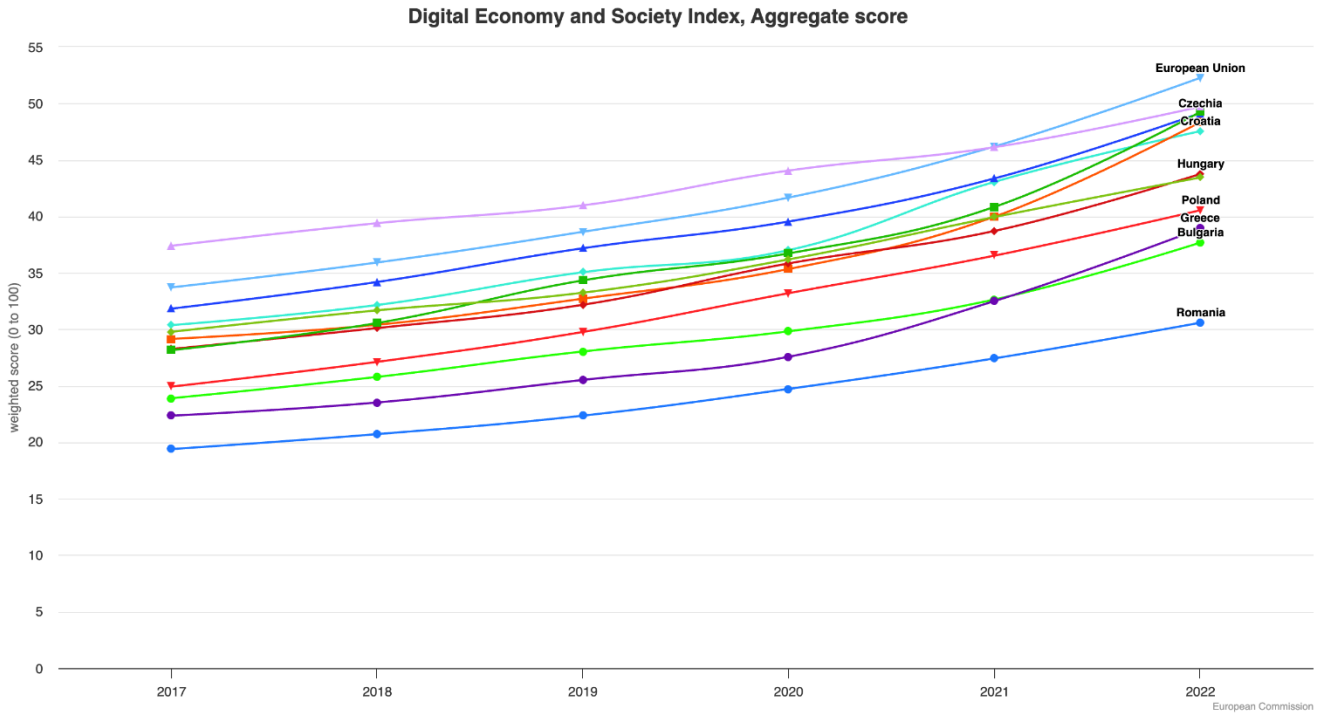


Source: DESI 2022 composite index[265]

Despite rapid progress across the board, the composite index, as of 2022, included the following countries with total scores below 50: Bulgaria, Croatia, Cyprus, Czechia, Greece, Hungary, Italy, Latvia, Poland, Slovakia, and Romania. These countries lag behind in their digital progress, compared to the EU-average of 52,28 (Figure 45).

[265] European Commission. Shaping Europe's digital future. DESI 2022 composite index. https://digital-decade-desi.digital-strategy.ec.europa.eu/datasets/desi-2022/charts/desi-composite?indicator=desi_sliders&breakdownGroup=desi&period=2022&unit=pc_desi_sliders.

Figure 45. DESI aggregate score



Source: DESI 2022 composite index[266]

After 2022, DESI tracks four groups of indicators: (1) digital skills, (2) digital infrastructure, (3) digital transformation of business, and (4) digitalisation of public service. Furthermore, the composite index was abandoned, and the indicator types were altered. Hence, the total scores across countries could no longer be compared with the pre-2023 DESI Composite Index.

Although the Strategic Agenda 2021–2027 does not explicitly refer to the Widening Countries or DESI performance, EIT Digital addresses similar challenges through the EIT RIS, which covers more than DESI<50 countries. The RIS is integrated across EIT Digital's core activities, venture creation, education, and ecosystem growth, with the overarching goal of increasing the digital competitiveness of EU MS that display lower levels of innovation.

Leveraging its nine existing Nodes across RIS countries, EIT Digital positions itself to deliver innovation, venture creation, and education more effectively in regions with lower innovation performance, supporting competitiveness.[267]

In the area of venture creation, the RIS Venture Programme is intended to complement existing mechanisms such as the Innovation Factory funnel,[268] DeepHack[269] and educational activities. Through this programme, EIT Digital aims to generate 25 new ventures annually and secure an equivalent number of new equity positions. Financing is supported by engaging private seed investors and national or regional funds, so that ventures emerging from RIS countries have access to growth capital.

[266] Ibid.
[267] Eit Digital. https://www.eitdigital.eu/fileadmin/2021/ecosystem/downloads/EIT-Digital-Contact-Us.pdf.
[268] EIT Digital. Open Innovation Factory. Boosting the next generation of digital ventures. https://www.eitdigital.eu/open-innovation-factory/.
[269] 25Digital. We build what's next.Talent. Tech. Trust. https://www.eitdigital.eu/deephack/.

EIT Digital also seeks to expand its partner base in RIS countries, aiming to increase partners by 15% annually between 2021 and 2027. The number of active RIS partners is expected to grow from 30 in 2021 to 78 in 2027, raising their overall share of EIT Digital partners from 9% to 12%.

To strengthen its geographical presence, EIT Digital has committed to expanding its RIS Hubs from four in 2021 to 12 by 2025–2027, alongside establishing satellite locations with support from local funding bodies and partner organisations. This expansion is further reinforced by governance, with RIS countries currently holding 33% of the Supervisory Board seats, ensuring representation in strategic decision-making.

Finally, EIT Digital is actively working to attract local funding in RIS countries. Its initial target is EUR 0,5 million in 2022, and the ambition is to grow further in subsequent years.[270]

EIT Digital's commitment is further operationalised in its Business Plan 2023–2024, through a dedicated Work Package on EIT RIS (WP4), with a planned budget of EUR 16,54 million (or 18,9 million including the full EIT contribution). Three instruments are mentioned in direct connection with achieving this societal impact:

- The **EIT Digital Accelerator** is expected to support at least 15 scale-ups from RIS countries (25% of its portfolio) and to help them attract more than EUR 25 million in investments, while the EIT Digital Challenge is targeting 25% of applications from RIS geographies.[271]
- **Venture Program** is set to create 50 new ventures, supporting entrepreneurs in RIS countries who often face limited access to funding and challenges in entering traditional incubators and accelerators due to their early-stage development. The programme takes entrepreneurs from concept to Minimum Viable Product (MVP, TRL 5-6), market validation, and creation of a deep tech venture.[272]
- The **EIT Digital Academy** is active in RIS countries through new **Summer Schools** that address digital skills gaps and provide support to local students.[273]

Besides that, by 2024, EIT Digital expects to engage over 230 organisations from RIS countries, building on the participation of nearly 200 partners across 20 countries during the 2023–2024 period. The expansion of the RIS Hub network is a central element, with five new hubs planned in North Macedonia, Croatia, Malta, Montenegro, and Serbia, bringing the total to 13 hubs by the end of 2024.

On the education side, the Master School network will expand into new RIS countries such as Romania, Czechia, Slovakia, and Slovenia, and at least 10 Summer Schools are planned in RIS countries during 2023–2024.[274]

The following Table 84 provides an overview of the impacts achieved for the KPI Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through RIS programme).

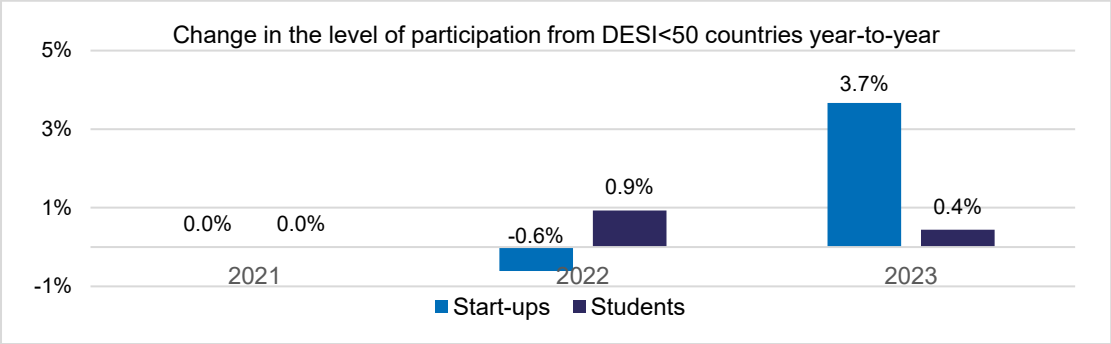
[270] EIT Digital Strategic Agenda 2021-2027.
[271] EIT Digital Business Plan 2023-2024.
[272] Ibid.
[273] Ibid.
[274] Ibid.

Table 84. Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through the RIS programme)

Impact indicators	Targets	Impacts achieved
Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through the RIS programme)	+100% participation by 2024 +130% Participation by 2027	The indicator of increased competitiveness of EU Member States, with a particular focus on countries with a lower DESI score, is interpreted and calculated by the KIC as a composite measure. It combines the participation of start-ups, students, and partners from countries with a DESI score below 50. These are Bulgaria, Croatia, Cyprus, Czechia, Greece, Hungary, Italy, Latvia, Poland, Slovakia and Romania, during the period from 2021 to 2023, which corresponds to the implementation of the Impact Framework and the most recent available dataset. The data present:

Participation of	2021	2022	2023
Start-ups[275]	47/136	55/162	41/109
Students[276]	191/531	314/851	171/458
Partners		As of May 2024, there were 268 active partners. 81 were from countries with a DESI score below 50.	

Source: Ecorys, based on EIT data



Overall, the data indicate that the target has not yet been achieved. Although participation increased to some extent, the decline observed in 2023 suggests that the required level of engagement has not yet been met.

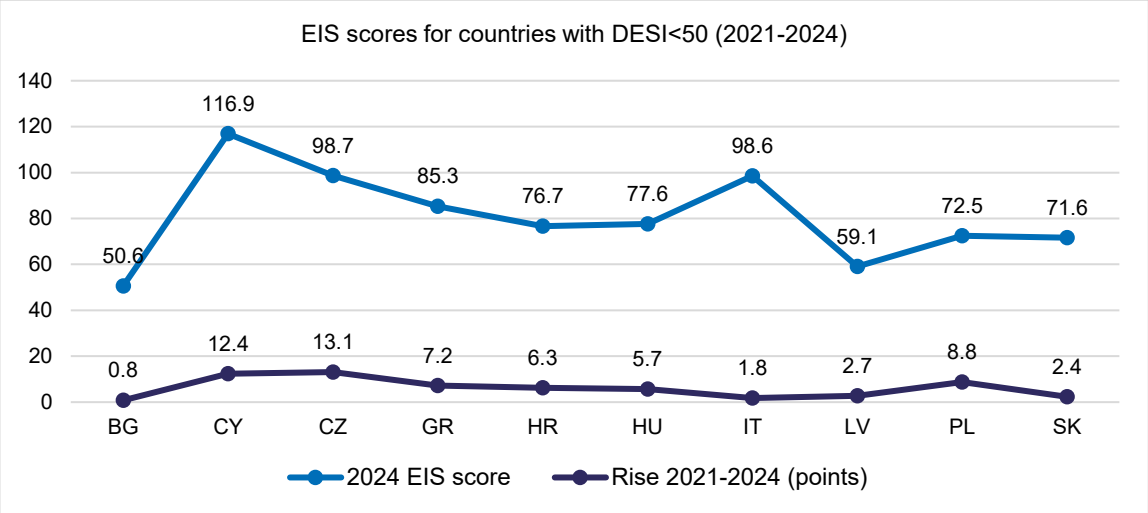
In addition to the numbers mentioned above, EIT Digital provides an overview of its activities in the widening countries, highlighting the contribution of its programmes to innovation and education. Since 2019, 122 start-ups have been created in

[275] EIT internal monitoring data, KPI EITHE03 -Start-ups and scaleups supported by KICs, by country of registration.
[276] EIT internal monitoring data, KPI EITHE09 -Students enrolled in EIT-labelled programmes, by country of origin.

widening countries with EIT Digital support, further developing the regional entrepreneurial landscape. On the academic side, 30 partner universities are engaged in EIT Digital activities, running 13 Master Programmes and 20 Summer Schools that connect students with cutting-edge knowledge in digital technologies and entrepreneurship. In 2023, these efforts involved 300 students from widening countries, who took part in the EIT Digital Master School and Summer School Programmes.[277] However, the "widening countries" is a broader category than the one defined by DESI.

Another measure used to assess the competitiveness of national innovation ecosystems is the European Innovation Scoreboard (EIS), which provides a comparative assessment of the research and innovation performance of EU MS, other European countries, and global competitors from 2017 to 2024. This data shows that every country with a DESI < 50 in 2022 has increased its innovation score, as shown in Figure 46.

Figure 46. EIS scores 2021-2024 of countries with DESI<50 (2022)



Source: European Innovation Scoreboard[278]

[277] EIT Digital | Widening Countries Key Figures, internal material.
[278] European Commission. European Innovation Scoreboard. https://projects.research-and-innovation.ec.europa.eu/en/statistics/performance-indicators/european-innovation-scoreboard/eis-2024#/eis?compare_year=2021.

- **Impact highlight**

EIT Digital supported Sensoneo, which is a Slovakia-based provider of smart waste management solutions, through the EIC–EIT Digital Venture Acceleration Program and its Growth Services team. The KIC provided access to finance expertise and connections to international investors, helping the company prepare for and secure a successful EUR 6,2 million Series A funding round led by Taiwania Capital, with participation from the EIC Fund and other investors.

> *This fundraising will allow us to consolidate our market-leading position worldwide, while continuing to innovate to remain at the forefront of our customers' needs.*
>
> *Martin Basila, CEO and Co-Founder of Sensoneo*

As a result, Sensoneo has expanded its global footprint, now operating in over 80 countries across five continents, and is set to deliver Europe's largest smart waste installation in Madrid. Its enterprise-grade SaaS solutions streamline waste collection, reduce environmental impacts, and contribute to the circular economy, including nationwide Deposit Return Systems for plastics.[279]

Impact attribution

The indicator "Level of participation of Member States with DESI lower than 50 in EIT Digital Activities" is designed to assess EIT Digital's contribution to reducing the digital divide across the EU by increasing the engagement of less digitally advanced Member States, specifically those with a DESI score below 50.

The indicator is conceptually linked to EIT Digital's overarching goal of enhancing digital competitiveness and inclusiveness across Europe. By tracking the participation of start-ups, students, and partners from these countries in EIT Digital's programmes (such as the RIS, Master School, Summer Schools, and venture support), the indicator reflects the organisation's efforts to foster innovation capacity and talent development in regions with historically lower digital performance.

As per Table 84 above, between 2021 and 2023, participation from DESI<50 countries showed some growth, particularly in 2022, but declined in 2023. For example, student participation rose from 191 in 2021 to 314 in 2022, before falling to 171 in 2023. Similarly, start-up participation peaked in 2022 and dropped in 2023. As of May 2024, 81 out of 268 active partners were from DESI in <50 countries. While these figures indicate progress, they also show that the 2024 target of +100% participation has not yet been achieved.

Nonetheless, EIT Digital's activities in these countries demonstrate a clear commitment to capacity building. Since 2019, 122 start-ups have been created in widening countries with EIT Digital support, and 30 universities have been engaged in 13 Master Programmes and 20 Summer Schools. In 2023, 300 students from widening countries participated in EIT Digital's education programmes. However, the "widening countries" category is broader than the DESI<50 group, which limits the precision of attribution.

When compared to broader European trends, the European Innovation Scoreboard 2024 confirms that all countries with DESI<50 in 2022, Bulgaria, Croatia, Cyprus, Czechia, Greece, Hungary, Italy, Latvia, Poland, Slovakia, and Romania, have improved their innovation performance. These countries have shown upward trends

[279] 28DGTL. Sensoneo secures €6.2M in Series A funding with EIT Digital support, to strengthen its global expansion. https://www.eitdigital.eu/newsroom/news/2023/sensoneo-secures-eur62m-in-series-a-funding-with-eit-digital-support-to-strengthen-its-global-expansion/.

in their innovation scores between 2017 and 2024, with several moving up in the innovation performance groupings.

Croatia advanced from “Emerging Innovator” to “Moderate Innovator,” while others, such as Cyprus and Hungary, experienced relative shifts due to changes in the performance of other Member States. These improvements reflect broader systemic progress, supported by a combination of national reforms, EU-level programmes (e.g., Horizon Europe, Digital Europe Programme), structural funds, and private-sector initiatives, rather than EIT Digital alone.[280]

EIT Digital has made a meaningful contribution to increasing participation from less digitally advanced Member States. However, the indicator reflects a contribution rather than a direct causal attribution to broader competitiveness outcomes, which remains indirect and influenced by multiple external factors.

Table 85 below presents and details the methodology for understanding attribution for this indicator. It explains how the indicator is linked to EIT Digital activities, the type and confidence of attribution, and the main caveats and limitations.

[280] European Commission: Directorate-General for Research and Innovation. (2024). European Innovation Scoreboard 2024. Publications Office of the European Union. https://data.europa.eu/doi/10.2777/779689.

Table 85. Impact attribution "Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through RIS programme)"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through the RIS programme)	This indicator is designed to assess EIT Digital's contribution to reducing the digital divide across the EU by increasing engagement from less digitally advanced Member States (DESI score below 50). It reflects EIT Digital's strategic intent to foster digital competitiveness and inclusiveness by tracking participation in programmes such as the Regional Innovation Scheme (RIS), Master School, Summer Schools, and venture support. The indicator captures how EIT Digital's targeted interventions have enabled start-ups, students, and partners from these countries to access innovation and education opportunities. However, the indicator does not isolate EIT Digital's unique impact, as improvements in digital performance are influenced by multiple systemic factors.	**Contribution** – EIT Digital's activities are one of several contributing factors to increased participation and digital capacity in DESI<50 countries; the indicator reflects its enabling role but not exclusive causality	**Moderate –** based on internally reported participation data from EIT Digital's monitoring systems. However, the data lack methodological transparency regarding how participation is defined and measured and do not provide sufficient detail on the type, intensity, or timing of support received. There is no follow-up data linking participation to specific outcomes (e.g. start-up success, employment, innovation output).	**Data limitations**: The indicator does not provide enough granularity to establish a direct causal. It tracks participation, not outcomes or long-term impact. **External factors**: Improvements in DESI<50 countries are influenced by a wide array of external drivers, including national digitalisation strategies, EU-level programmes (e.g. Horizon Europe, Digital Europe Programme), structural funds, and private-sector initiatives. **Lack of methodological transparency**: The indicator does not specify the type, intensity, or timing of support received by participants, nor does it link participation to specific interventions or outcomes. It also includes data from "widening countries," which extends beyond the DESI<50 group, limiting attribution precision.

4.2.3.2 Increased digital talent development in Europe

Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality label by European Technical universities

The European Commission is actively addressing challenges in digital education through its flagship policy, the **Digital Education Action Plan (2021–2027)**. This comprehensive strategy aims to support the development of a high-performing digital education ecosystem and enhance digital skills and competencies across Europe.

Complementary actions contribute to this effort. These include the **SELFIE tool** (Self-reflection on Effective Learning by Fostering the Use of Innovative Educational Technologies), which helps schools assess their use of digital technologies, and **SELFIE for TEACHERS**, designed to support educators in strengthening their digital competence.

The Commission collaborates with the **EIB**, notably through the **InvestEU** programme, to facilitate Member States' access to funding for digital and physical infrastructure, skills development, and innovative teaching methods. Additionally, the Erasmus+ and European Solidarity Corps programmes for 2021–2027 have been enhanced to be more green and digitally oriented.

Furthermore, the Recovery and Resilience Facility supports Member States in addressing digital education needs in the aftermath of the COVID-19 pandemic. **The European Social Fund** promotes digital skills development to foster more equitable job opportunities, while the **Digital Europe Programme (DIGITAL)** focuses specifically on advancing high-level digital skills across the EU.[281]

As part of the strategic framework for the European Education Area (2021–2030), the Council of the EU has set ambitious targets to improve digital education across Member States. One key objective is that by 2030, fewer than 15% of eighth-grade students in the EU should be classified as low achievers in computer and information literacy. To support this goal, the DELTA Working Group (Digital Education: Learning, Training and Assessment) has been established. This group fosters mutual learning, facilitates the exchange of best practices, and promotes collaboration among Member States to strengthen digital education policies and initiatives.

EIT Digital supports the development of Europe's digital talent base through the EIT Digital Entrepreneurial Academy, which delivers EIT-labelled Master's and Doctorate programmes, Summer Schools, and Professional education, aiming to address skills shortages, strengthen innovation capacity, and provide learners with both technical and entrepreneurial competencies[282]:

- The **Master School** offers seven EIT-labelled programmes designed to train T-shaped engineers who combine strong technical expertise with innovation and entrepreneurship skills.
- The **Doctoral School** focuses on industrial, market-oriented research, complemented by innovation and entrepreneurship education and international mobility.
- The **Professional School** provides short, blended courses for working professionals and executives, aligning upskilling opportunities with current labour market needs in digitalisation (see next section for details).

[281] European Commission. European Education Area. Quality education and training for all. https://education.ec.europa.eu/focus-topics/digital-education/about-digital-education.
[282] EIT Digital Business Plan 2023-2024.

- The **Summer Schools** deliver intensive training built around real-life cases provided by industry partners and are open to both students and professionals.[283]

In 2023–2024, these activities are closely linked to the EIT Deep Tech Talent Initiative[284], which aims to train one million people in deep tech by 2025. EIT Digital contributes through education programmes in fields such as cybersecurity, artificial intelligence, robotics, data science, cloud and network infrastructures, green digital, blockchain, and quantum computing. Planned activities by 2025 include training around 350 Master School learners, 15 doctoral candidates, 600 Summer School participants, and 175 professional learners, supported by a mix of EIT, partner, and external funding.[285]

The indicator "Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality Label by European Technical Universities" is designed to reflect EIT Digital's contribution to strengthening digital talent development across Europe. It captures the uptake of EIT Digital's education models by European technical universities, which is a foundational step in building a digitally skilled workforce aligned with the organisation's mission.

The following Table 86 provides an overview of the impacts achieved for KPI Adoption of the EIT Digital Master School model, the Industrial Doctoral School model, and the EIT Quality label by European Technical universities.

[283] Ibid.
[284] https://www.eitdeeptechtalent.eu/.
[285] EIT Digital Business Plan 2023-2024.

Table 86. Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality label by European Technical universities

Impact indicators	Targets	Impacts achieved
Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality label by European Technical universities	10% of European Technical universities Average DESI for Human Capital development in Europe >60 by 2024 15% of European Technical universities Average DESI for Human Capital development in Europe >75 by 2027	The adoption of the EIT Digital School models can be assessed in terms of the share of academic partners among Europe's technical universities. As of May 2024, 44 ETUs were partnering with EIT Digital. Given that Europe has over 180 technical universities, this represents an adoption rate of around 23%.[286] This means that the target for the adoption of the EIT Digital school model was already achieved and surpassed, even for the year 2027.
		As of 2024
		23,9%
		There is no single measurement that fully captures the progress of Human Capital development within DESI in relation to EIT Digital's objectives yet, as the last available data on average Human Capital is from 2021. However, several indicators reflect positive trends in areas directly relevant to digital skills and workforce capacity. The share of individuals with above-basic digital skills in the EU-27 increased from 26,5% in 2021 to 32% in 2023, indicating a steady improvement in the general population's digital readiness. In higher education, the proportion of ICT graduates rose from 3,9% in 2020 to 4,5% in 2022, signalling a growing pipeline of digitally skilled professionals. Similarly, the share of ICT specialists in the workforce increased from 4,5% in 2021 to 4,8% in 2023, reflecting gradual expansion in digital employment across the EU.[287]

[286] EIT internal monitoring data; https://engirank.eu/ranking/2024/all/.
[287] European Commission. Shaping Europe's digital future . https://digital-decade-desi.digital-strategy.ec.europa.eu/datasets/desi/charts/desi-indicators.

Impact attribution

By formalising partnerships and integrating EIT Digital's education frameworks, universities commit to delivering high-quality, innovation-driven digital education. This adoption is expected to enhance the pipeline of ICT graduates and specialists, contributing to broader human capital development goals as measured by the DESI.

As of May 2024, 44 European Institutions were partnering with EIT Digital, representing 23,9% of Europe's 184 technical universities. This surpasses both the 2024 target of 10% and the 2027 target of 15%, indicating strong traction and institutional endorsement of EIT Digital's education models. While the indicator directly measures adoption, its link to broader human capital outcomes is less direct. DESI data on human capital for 2024 is not yet available; related metrics indicate positive trends, as shown in Table 86 above. These trends suggest that EIT Digital's education activities are contributing to a broader ecosystem of digital talent development, though attribution remains shared across multiple actors and policies.

Table 87. Impact attribution: “Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality label European Technical universities”

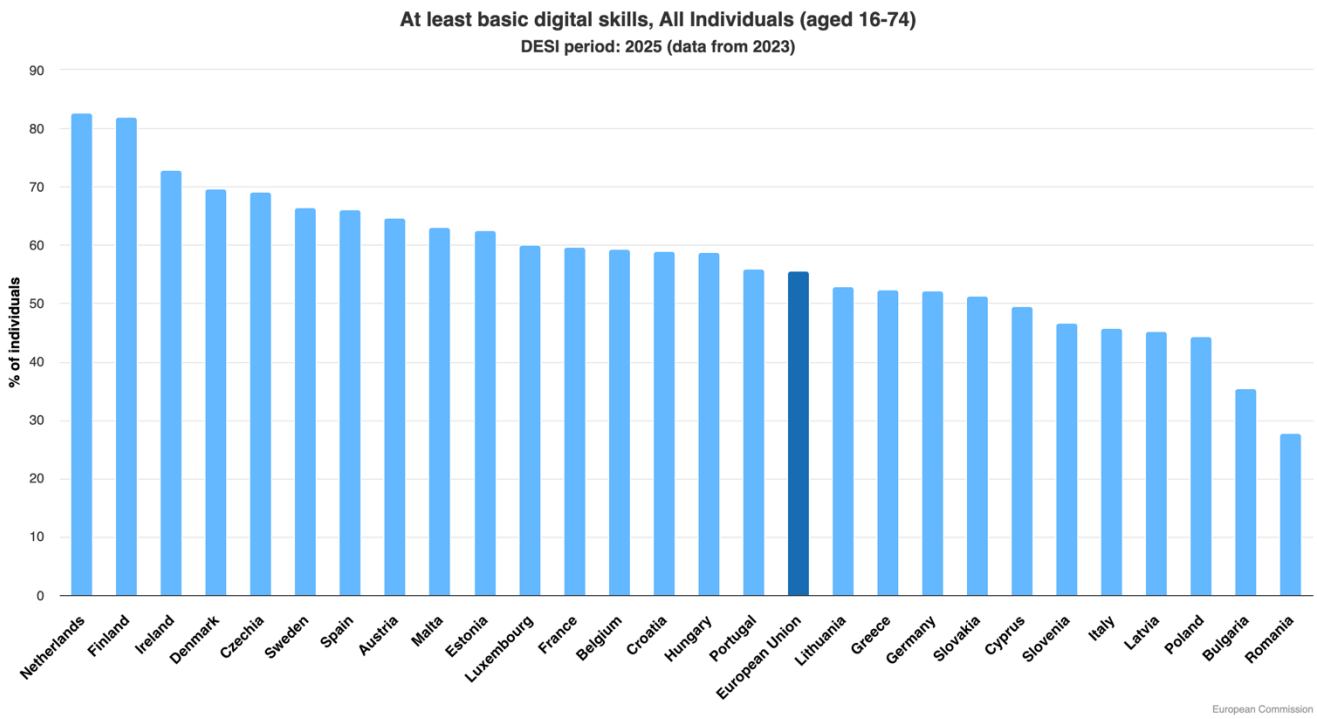
Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality Label by European Technical Universities	This indicator tracks the formal adoption of EIT Digital’s education models by European technical universities. The partnerships represent a direct output of EIT Digital’s strategic engagement in higher education and are intended to strengthen digital talent development across Europe. Adoption reflects institutional commitment to delivering innovation-driven digital education aligned with EIT Digital’s standards.	**Direct attribution** – input indicator.	**High –** based on formal agreements and internal records confirming institutional adoption. The indicator directly reflects EIT Digital’s activities and outputs.	**Scope limitation:** The indicator measures adoption, not the effectiveness or outcomes of the education models. **Methodological limitations:** DESI human capital data is not yet available for 2024, limiting validation of downstream impact. **External factors:** National education reforms, EU programmes, and labour market dynamics influence wider improvements in digital skills and employment. **Variable implementation:** The quality and depth of model adoption may vary across institutions, affecting consistency and comparability.

4.2.3.3 Increased digital upskilling of European professionals

EIT Digital Professional and Online learners and # new micro-credentials developed by EIT Digital-supported universities

According to the 2025 DESI data (Figure 47), the EU average percentage of people with at least basic digital skills amounted to 55,56%.[288] This figure significantly lagged behind the ambitious EU target of 80% of adults with at least basic ICT skills, set out in the 2030 Digital Decade targets. Comparing this indicator's score with previous years' measurements shows that progress has stalled. In 2024, the same percentage reported possessing at least basic digital skills, while in 2023 the percentage was slightly lower at 53,92%.

Figure 47. At least basic digital skills, DESI



Source: DESI 2025[289]

To upskill European professionals, EIT Digital offers two main pathways. The **Professional School** offers short, blended courses that combine live sessions with online modules. These courses are tailored to the needs of working professionals and executives, supporting digital upskilling in areas aligned with market demand and European strategic priorities such as artificial intelligence, cybersecurity, blockchain, and data science. The blended model allows for flexibility while maintaining strong practical and business-oriented relevance. Courses are often co-created with industrial and academic partners to reflect real market needs, with strict sustainability and financial criteria guiding their development.[290]

[288] European Commission. Shaping Europe's digital future. https://digital-decade-desi.digital-strategy.ec.europa.eu/datasets/desi/charts/desi-indicators?indicator=desi_dsk_bab&breakdown=ind_total&unit=pc_ind&country=AT,BE,BG,HR,CY,CZ,DK,EE,EU,FI,FR,DE,EL,HU,IE,IT,LV,LT,LU,MT,NL,PL,PT,RO,SK,SI,ES,SE&period=desi_2025.
[289] European Commission. Shaping Europe's digital future. https://digital-decade-desi.digital-strategy.ec.europa.eu/datasets/desi/charts/desi-indicators?period=desi_2025&indicator=desi_ict_spec&breakdown=f&unit=pc_ict_spec&country=AT,BE,BG,HR,CY,CZ,DK,EE,EU,FI,FR,DE,EL,HU,IE,IT,LV,LT,LU,MT,NL,PL,PT,RO,SK,SI,ES,SE.
[290] EIT Digital Strategic Agenda 2021-2027, EIT Digital Business Plan 2023-2024.

In parallel, EIT Digital provides Massive Open Online Courses (**MOOCs**) through **Coursera**. These courses extend reach to a global audience and serve as an entry point for learners, many of whom may later transition to the Professional School.[291]

The indicators "EIT Digital Professional and Online learners" and "New micro-credentials developed by EIT Digital-supported universities" are designed to capture EIT Digital's contribution to enhancing the digital skills of European professionals. They combine two key dimensions:

- **Reach**: the number of professionals and online learners engaged in EIT Digital-supported programmes.
- **Learning innovation**: the development and issuance of micro-credentials by EIT Digital-supported universities, enabling modular and flexible learning aligned with industry needs.

The following Table 88 provides an overview of the impacts achieved for KPI # EIT Digital Professional and Online learners/# new micro-credentials developed by EIT Digital-supported universities.

[291] Ibid.; see case study below for more details.

Table 88. # EIT Digital Professional and Online learners/# new micro-credentials developed by EIT Digital-supported universities

Impact indicators	Targets	Impacts achieved	
# EIT Digital Professional and Online learners \# new micro-credentials developed by EIT Digital-supported universities	Online Learners: 1 million Micro-credentials issued to learners: 50 000 Number of new micro-credentials: 5 by 2024 Online Learners: 1,5 million Micro-credentials issued to learners: 110 000 Number of new micro-credentials: 15 by 2027	As of 2024, EIT Digital reported a cumulative total of 472 000 Professional and Online learners.[292] This includes participation in initiatives such as AI Essentials, which trained 795 learners across two editions in 2023, and the Speed Master executive education programme, which engaged 159 participants.[293] Coursera-based courses have also played a key role, attracting more than 409 000 unique learners since 2015 (see case study below for details).[294] 25 500 micro-credentials have been issued.[295] Based on the assumption of one micro-credential per course, 46 Coursera courses have been launched since 2015,[296] with one additional course (AI for Cybersecurity, developed with Babeș-Bolyai University) in preparation for 2024. However, information on the number of newly developed micro-credentials for the most recent reporting period was unavailable, so progress against this element of the KPI is not yet fully documented. Overall, these results demonstrate substantial uptake of EIT Digital's professional and online learning activities but indicate that the Strategic Agenda's interim targets for 2024 have not been met.	
		Cumulative by 2024[297]	
		Professional and Online learners	472 000
		Micro-credentials issued	25 500

[292] EIT Digital impact data, EIT internal monitoring.
[293] Ibid.
[294] EIT Digital Courses on Coursera, internal material.
[295] EIT Digital impact data, EIT internal monitoring.
[296] EIT Digital Courses on Coursera, internal material.
[297] EIT Digital impact data, EIT internal monitoring.

Case study: EIT Digital courses on Coursera

Initiative highlights

The EIT Digital MOOC portfolio on Coursera was launched in 2015 and remains successfully active today. Developed with contributions from EIT Digital's network of leading European technical universities, it is rooted in Europe but reaches learners worldwide through Coursera's online platform.

The portfolio was created to address Europe's growing digital skills gap, which left many professionals and graduates without the competencies required in rapidly evolving labour markets. By offering flexible, accessible, and high-quality online learning opportunities, the Massive Open Online Courses (MOOCs) complement classroom-based education and support lifelong learning.

To date, the portfolio has expanded access to specialised digital education for both students and professionals, strengthened the visibility and international networks of EIT Digital's partners, and contributed to global digital capacity-building, with particularly strong uptake in emerging economies.

Context and rationale

The launch of EIT Digital's MOOC portfolio on Coursera was driven by urgent societal and economic conditions. By the mid-2010s, Europe faced a persistent shortage of digital skills across the workforce, with professionals and graduates alike requiring new competencies to remain competitive in rapidly changing labour markets. For example, in 2014, European enterprises already had hard-to-fill vacancies for jobs requiring ICT specialist skills, and this number significantly increased by 2022.[298]

At the same time, demand for flexible, accessible, and scalable training formats was rising, fuelled by the success of MOOCs, which by 2015 had become a significant part of higher and professional education worldwide, a trend that has only strengthened over the past decade.[299] Universities and professional providers responded by developing online courses at scale, while professionals increasingly sought learning options that did not require physical attendance.

The portfolio aimed to tackle these challenges by widening equitable access to advanced digital education, strengthening employability, and better aligning Europe's workforce with the demands of digital transformation. Its design was informed by developments in digital education and insights from EIT Digital's close interaction with both learners and employers within its ecosystem.

The portfolio aligns closely with EU-level strategies and funding programmes, notably the Digital Education Action Plan[300] and the European Commission's digital skills initiatives.[301] It also supports the Digital Decade 2030 targets, which aim to ensure that 80% of adults possess basic digital skills and to cultivate 20 million ICT specialists, with improved equality and gender balance.[302]

About the initiative

The MOOC portfolio follows a professional training format, with recorded lectures, readings, and assessments. Much of the learning material was developed with the support of EIT-funded initiatives, ensuring that the courses incorporated both cutting-edge research and practical relevance.[303] The portfolio drew on the strengths of the EIT Digital partner network. Universities, researchers, and professional instructors contributed their expertise in both technical and entrepreneurial domains, shaping the content to meet professional needs.

Coursera provides a global platform, facilitating worldwide access to the materials and supporting large-scale dissemination.[304] EIT Digital's decision to partner with Coursera combined strategic vision with practical considerations. Coursera offered an industry-recognised platform through which EIT Digital could broaden the reach of its Master's and Professional Schools, complement classroom-based education with a strong online presence, and engage a global audience.

Rather than replacing face-to-face teaching, the platform enabled pilots and content sharing while significantly extending accessibility and impact. Coursera's combined reach with credibility enables EIT Digital to connect its MOOC portfolio to a large community of learners. Strategically, the move aligned with EU priorities on digitalisation, lifelong learning, and workforce upskilling. Practically, the choice was straightforward: the content was ready, demand was clear, and Coursera offered the fastest and most effective path to large-scale delivery.[305]

EIT Digital developed a portfolio of MOOCs designed to expand the reach and impact of its Innovation and Entrepreneurship curriculum. Since 2015, it has launched around 45 courses and 3 specialisations, gradually opening up parts of its academic and entrepreneurial training to a wider audience. The MOOCs span a diverse range of domains: Computer Science (18), Business (14), Information Technology (5), Data Science (5), and Social Sciences (4).[306]

The offer focuses on high-quality academic content and entrepreneurial training, with MOOCs developed in collaboration with 20 leading European technical universities.[307] For example, EIT Digital Coursera MOOCs combine technical expertise (cybersecurity, blockchain, big data, IoT, digital twins) with strategic and managerial perspectives (AI and business, digital transformation, sustainable digital innovation).[308]

Since 2015, EIT Digital MOOCs on Coursera have attracted over 565 000 enrolments, engaging more than 400 000 unique learners, including about 29 000 enrolments in specialisations.[309]

Societal impacts

The EIT Digital MOOC portfolio promotes greater equality by offering courses on in-demand digital topics that are delivered in English, accessible online worldwide, and available at learners' own pace. This combination reduces barriers linked to geography, cost, and time, opening access to advanced training for diverse groups of students and professionals. Strong uptake in emerging economies demonstrates its impact in extending opportunities where comparable education is scarce, while the flexible format creates entry points for underrepresented groups, supporting EU goals on digital inclusion.

Measurable societal impact is primarily visible in its scale. Since its inception, EIT Digital's Coursera MOOC portfolio has attracted over 565 000 enrolments and engaged more than 400 000 unique learners worldwide. For many, particularly in emerging economies, this represented a first opportunity to engage with structured training in specialised digital fields. The top learner countries included India, the United States, Germany, the United Kingdom, Egypt, Canada, France, Pakistan, the Netherlands, and Brazil. High engagement in non-EU countries demonstrates the portfolio's contribution to global digital capacity-building, extending access to European-designed curricula beyond their regional origins.[310]

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[298] Eurofound (2023), Measures to tackle labour shortages: Lessons for future policy, Publications Office of the European Union, Luxembourg, p. 19.
[299] Yindeemak, Ampawan & Limpinan, Potsirin & Pasmala, Rungfa & Nammanee, Manop & Jantakoon, Thada. (2025). Trends in Massive Open Online Courses (MOOCs) Research Over the Past Ten Years (2015–2024): A Bibliometric Analysis. Journal of Education and Learning. 14. 209. 10.5539/jel.v14n5p209.
[300] European Commission. European Education Area. Quality education and training for all. https://education.ec.europa.eu/focus-topics/digital-education/actions
[301] European Commission. Shaping Europe's digital future. Digital skills initiatives. https://digital-strategy.ec.europa.eu/en/policies/digital-skills-initiatives
[302] European Commission. Shaping Europe's digital future. Europe's Digital Decade. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/europes-digital-decade-digital-targets-2030_en
[303] EIT Digital input.
[304] Ibid.
[305] Ibid.
[306] EIT Digital, EIT Digital Courses on Coursera, internal material.
[307] Coursera. 28DIGITAL. https://www.coursera.org/partners/eitdigital
[308] EIT Digital, EIT Digital Courses on Coursera, internal material.
[309] Ibid.
[310] EIT Digital, EIT Digital Courses on Coursera, internal material

Gender participation was less balanced, with 76% men and 24% women, reflecting the well-recognised challenge of attracting women into digital professions.[311] At the same time, the flexible and broad portfolio of MOOCs creates opportunities to address this gap by offering accessible entry points for diverse learner groups. In this respect, the portfolio has the potential to support EU policies aimed at improving gender balance in ICT careers, as set out in the Digital Decade targets.

Data indicate that 55% of participants were working professionals and 35% were students, confirming the dual role of MOOCs in supporting lifelong learning and entry into the labour market. Age distribution shows that 25–34-year-olds formed the largest group, followed by 35-44-year-olds, suggesting strong uptake among early-to mid-career professionals.[312]

Educationally, the majority of learners already hold a Bachelor's or Master's degree, emphasising the positioning of the MOOCs as tools for professional upskilling and continued learning. The sharp rise in completions from 2019 onwards highlights both the strong appetite for education and the capacity of well-designed content to sustain engagement.[313] Although there is no available data on the impact of course participation on the career paths of attendees[314], course reviews suggest that they have had a positive influence:

> *From the perspective of a technology consultant who is not that eager to deal with management issues, the course has proven very valuable. (..) There is a direct benefit for my work from the course, as it spoke about the subject of technology evaluation frameworks, like TRLs – useful for a person who sometimes works with R&D grant procedures, like I do.*[315]

The impact has extended to institutions. Universities and instructors gain increased visibility, expand their international networks, and validate the potential of online learning to complement traditional classroom formats.[316] For EIT Digital, the project strengthened its role as an intermediary between research, education, and practice, while reinforcing the visibility of the EIT brand in digital skills education. At the system level, the courses contributed to the normalisation of MOOCs as a legitimate vehicle for professional training. While online learning was already on the rise globally, EIT Digital's early move onto Coursera positioned European institutions within this shift and helped bring their content reach global audiences.[317]

It is unlikely that these impacts would have occurred at the same scale without the EIT's support. EIT provided the funding framework, while EIT Digital assembled a network of partner universities to co-develop curricula and leveraged its brand credibility to attract learners and partners alike. The decision to invest in an emerging global platform at a formative moment amplified reach and accelerated uptake. Building on this foundation, EIT Digital combined curriculum excellence, brand credibility, and strategic timing to mobilise its network and deliver outcomes that would have been difficult to replicate otherwise.

[311] Ibid.
[312] Ibid.
[313] EIT Digital input.
[314] Because the initiative is delivered entirely through an online platform, there is no mechanism for systematic follow-up with learners after course completion.
[315] Coursera. Participant opinions and feedback on the course The Impact of Technology (28DIGITAL). https://www.coursera.org/learn/impact-of-technology/reviews
[316] EIT Digital input.
[317] EIT Digital input.

Impact attribution

By delivering professional and online courses and supporting the development of micro-credentials, EIT Digital aims to provide accessible, high-quality training aligned with industry needs. These efforts are expected to contribute to broader EU objectives on digital skills, as measured by frameworks such as DESI.

As of 2024, EIT Digital reported 472 000 cumulative professional and online learners, compared to an interim target of 1 million by 2024 and a long-term goal of 1,5 million by 2027. Similarly, 25 500 micro-credentials have been issued, falling short of the 2024 target of 50 000 and the 2027 goal of 110 000. While these figures demonstrate substantial uptake of EIT Digital's learning initiatives, they fall short of the Strategic Agenda's interim milestones.

The attribution of these results to EIT Digital is strong, as the reported learners and credentials are directly linked to its programmes and partnerships. However, the robustness of evidence is moderate due to reliance on cumulative figures since 2015 and gaps in reporting on new micro-credential development. External factors such as market demand, competition from other providers, and institutional capacity may also have influenced uptake.

Table 89. Impact attribution "# EIT Digital Professional and Online learners/# new micro-credentials developed by EIT Digital-supported universities"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# EIT Digital Professional and Online learners # new micro-credentials developed by EIT Digital-supported universities	Captures the combined outputs of EIT Digital's education initiatives: a) number of learners engaged in professional and online programmes. b) creation and issuance of micro-credentials by supported universities. These outputs are intended to directly contribute to the upskilling of European professionals by providing accessible, high-quality, and industry-relevant learning opportunities. The logic is that higher participation in these programmes and the availability of modular credentials will improve digital skills across the workforce.	**Direct attribution** – input indicator.	**Moderate –** The data comes from internal reporting systems and platform analytics (e.g., Coursera dashboards) and is therefore reliable for counting learners and issued credentials. However, there are limitations: the figures are cumulative since 2015, which makes it difficult to assess recent performance trends, and reporting on the number of newly developed micro-credentials during the latest period is incomplete. These gaps reduce the overall robustness of the evidence.	**Data limitations**: The data aggregates results since 2015, masking year-on-year progress. There is also missing information on the number of newly developed micro-credentials, which prevents a full assessment of progress against this KPI component. **External factors**: Uptake of online learning and micro-credentials is influenced by factors beyond EIT Digital's control, including market demand for digital skills, competition from other training providers, and partner universities' capacity to scale offerings. **Scope limitation**: The indicator measures outputs (participation and credentials issued) rather than actual learning outcomes, skills acquisition, or labour market impact.

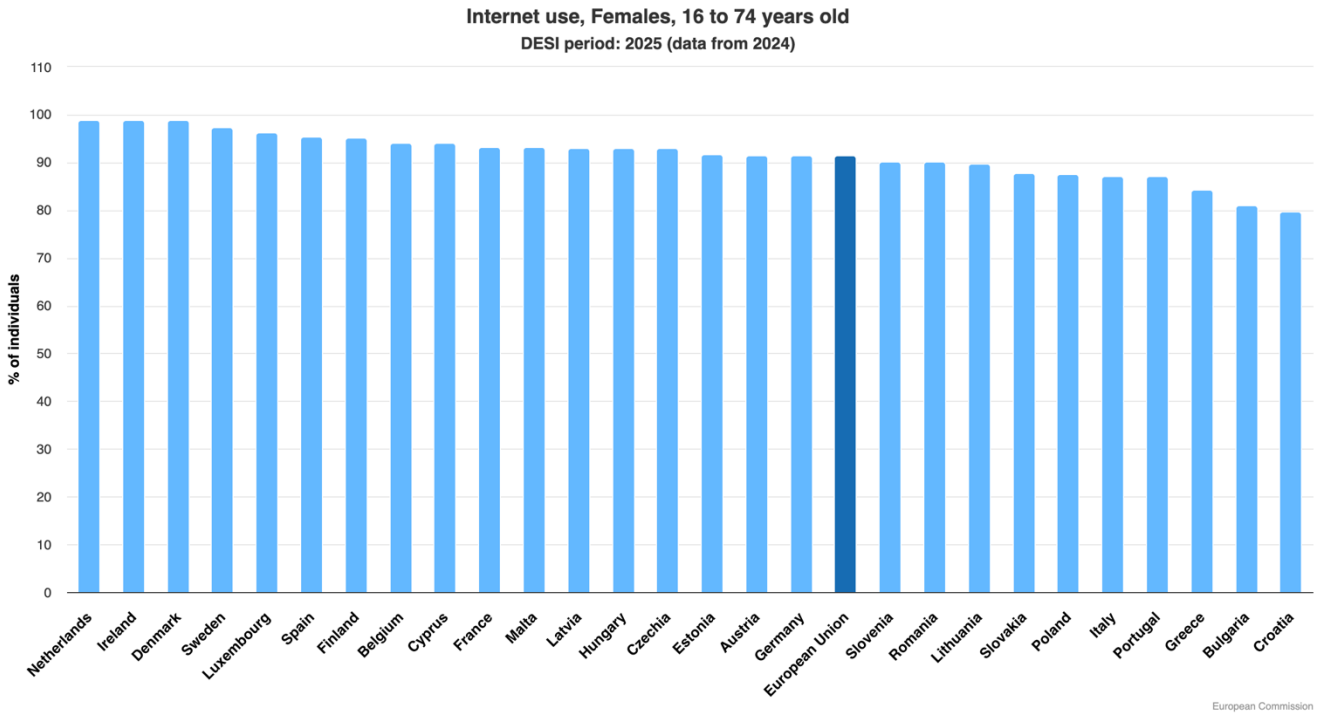
4.2.3.4 Increased gender equality in digital education in Europe

% of women students in EIT Digital programmes

Average DESI for Human Capital development in Europe

According to the DESI Indicators for 2025, Internet use among the female population, aged 16 to 74 (Figure 48), averages 91,41% across EU countries. This percentage is almost identical to the Internet use among the men population in the EU – 91,93%.

Figure 48. Internet use, women, DESI

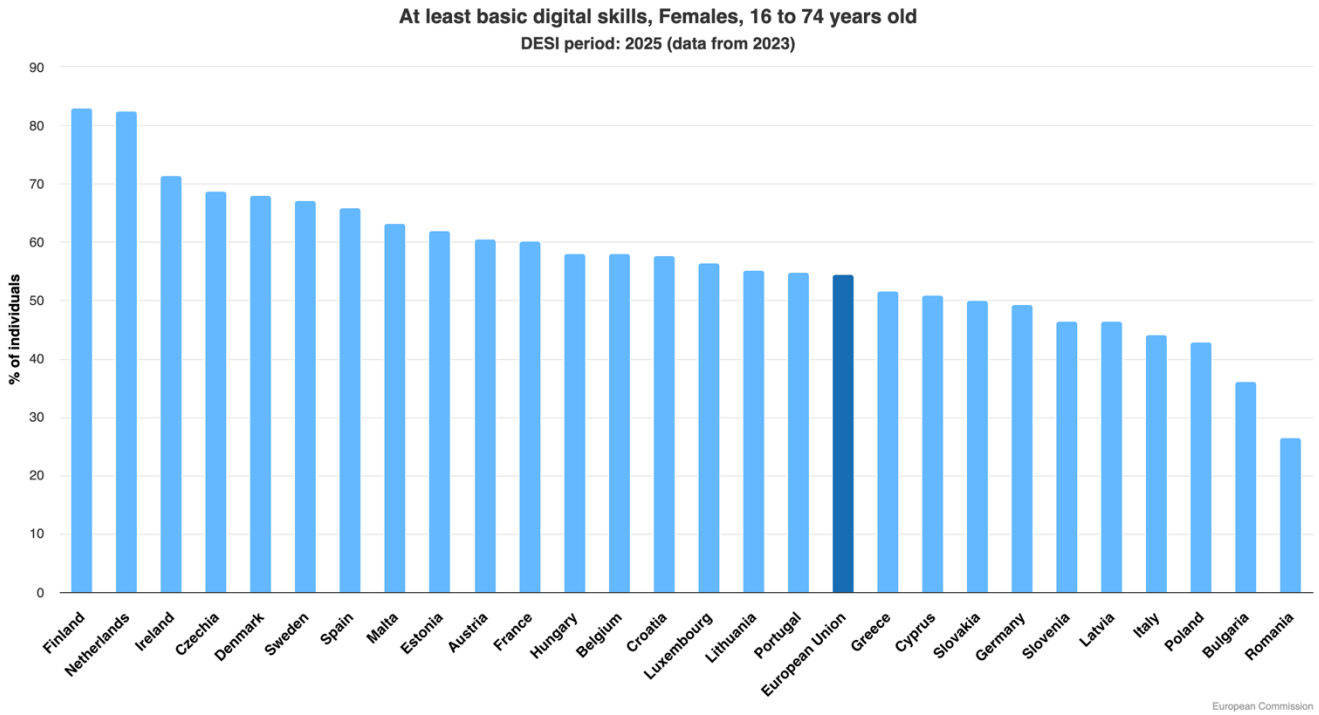


Source: DESI 2025[318]

The EU average of 54,46% of women citizens have at least basic computer skills (Figure 49), which is slightly lower than the EU average for the same indicator – 56,69%. Regarding the percentages of women and men possessing above-average computer skills, there is once again a slight prevalence among men (25,40% of women, compared to 29,30% of men indicating that they possess above-average ICT skills). Both indicators reveal that a sizable part of the EU citizenry needs ICT training, putting a particular focus on the inclusion of women.

[318] European Commission. Shaping Europe's digital future. DESI 2022 composite index. https://digital-decade-desi.digital-strategy.ec.europa.eu/datasets/desi/charts/desi-indicators?period=desi_2025&indicator=desi_ict_spec&breakdown=f&unit=pc_ict_spec&country=AT,BE,BG,HR,CY,CZ,DK,EE,EU,FI,FR,DE,EL,HU,IE,IT,LV,LT,LU,MT,NL,PL,PT,RO,SK,SI,ES,SE.

Figure 49. At least basic digital skills, women, DESI

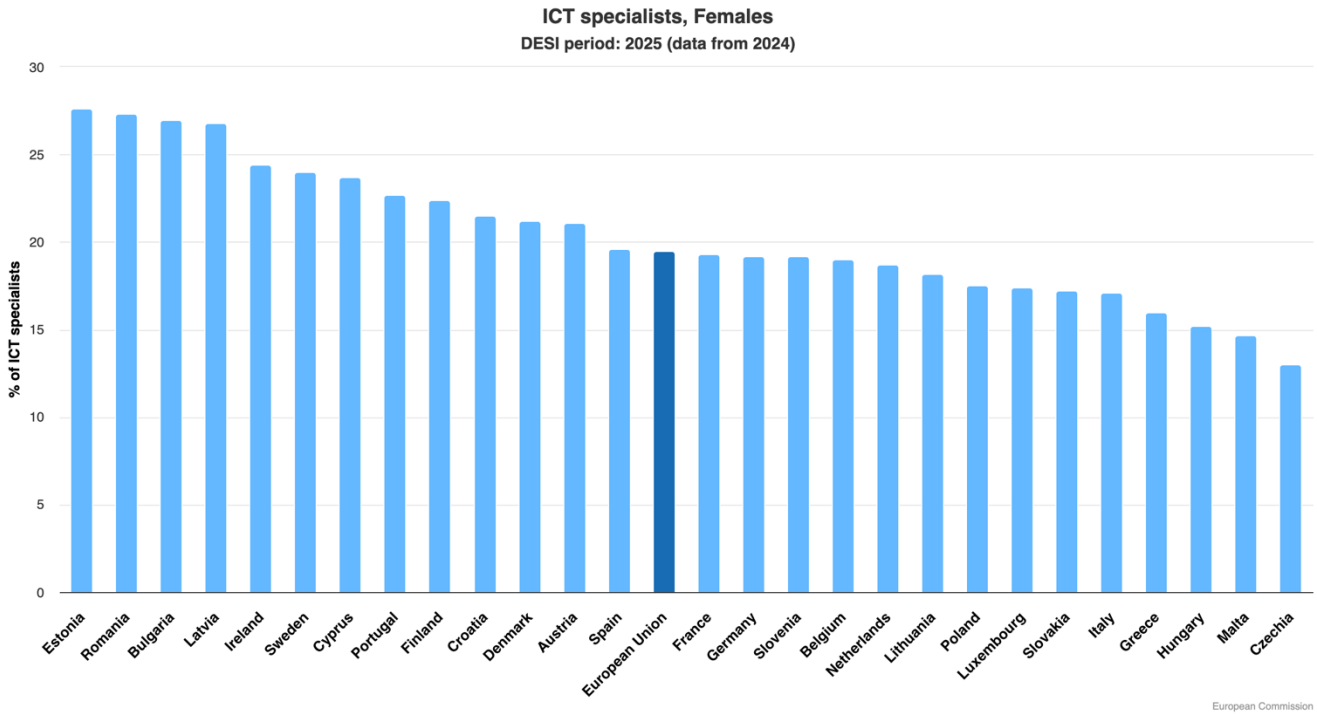


Source: DESI 2025[319]

The gender gap, however, is most pronounced when the numbers of ICT industry specialists are compared on the EU level, out of 10,27 million ICT specialists, only 2 million are women, constituting 19,5% of the workforce (Figure 50). The 5-to-1 ratio reveals a serious impediment to women's ability to join the industry. While this can be attributed to more than one cause, targeted ICT education for women will definitely help to alleviate the current gender imbalance in the ICT industry.

[319] Ibid.

Figure 50. ICT specialists, women, DESI



Source: DESI 2025[320]

EIT Digital recognises that women's participation in the ICT sector remains significantly below desired levels, often not exceeding 20% across many roles. To address this persistent imbalance, EIT Digital has committed to actively promoting gender equality within its education, innovation, and entrepreneurship activities. The KIC emphasises that building a more diverse and inclusive ecosystem leads to stronger products, services, and solutions, while empowering women leaders is essential to tackling Europe's ICT skills shortage.[321]

Since 2017, EIT Digital has implemented a Gender Balance Action Plan, setting yearly targets and monitoring progress. Through this plan, the KIC seeks to strengthen women's representation among students, researchers, entrepreneurs, and innovators in its programmes and to stimulate gender equality awareness among partners across its ecosystem.[322]

At the educational level, EIT Digital aims to train competent women and men in ICT entrepreneurship, leadership, and professional roles. EIT Digital considers this essential to increasing the supply of skilled ICT workers and enhancing access for women students to the EIT Digital Academy. This approach seeks to address both the skills shortage and the significant under-representation of women in ICT sectors. To improve women's participation in KIC activities, which are predominantly carried out by partners, EIT Digital envisions fostering gender equality awareness where needed, both within its ecosystem and among its partners.[323]

In the field of entrepreneurship, specific measures have been introduced to support women-led companies. Targeted sourcing campaigns aim to attract women entrepreneurs and identify scale-ups with women founders or CxOs. For example, the EIT Digital Challenge has set the ambition to achieve over 50% of applications from women-led scale-ups in 2023–2024.[324]

[320] Ibid.
[321] EIT Digital Gender Mainstreaming Policy, 2023.
[322] EIT Digital Strategic Agenda 2021-2027, EIT Digital Business Plan 2023-2024.
[323] EIT Digital Gender Mainstreaming Policy, 2023.
[324] EIT Digital Strategic Agenda 2021-2027, EIT Digital Business Plan 2023-2024.

Examples of activities that support increased women's participation in digital education include:

- The **EMAI4EU** project, funded by the EU's Digital Europe Programme and supported by EIT Digital, delivers a double degree master's programme in Emotion AI with a minor in Innovation and Entrepreneurship. Developed with universities, research centres, and businesses, the programme combines advanced technical training with entrepreneurial skills.[325]
- The **ACHIEVE** project, also funded by the EU's Digital Europe Programme, establishes a double degree master's programme in Cloud and Networking Infrastructure (ISCED Level 7, 120 ECTS), with a minor in Innovation and Entrepreneurship. The programme addresses Europe's need for expertise in high-performance computing (HPC) to tackle complex, data-intensive challenges while supporting the transition to green and efficient digital infrastructures.[326]

A key feature of both projects is their strong focus on diversity and inclusion. Scholarships prioritise women applicants from EU and EU-associated countries, aiming to increase women's participation. Priority is also given to students from EIT RIS countries.

The following Table 90 provides an overview of the impacts achieved for the KPI % of women students in EIT Digital programmes/Average DESI for Human Capital development in Europe.

[325] 28DGTL.EMotion Artificial Intelligence specialists for Europe (EMAI4EU) https://www.eitdigital.eu/eu-collaborations/emai4eu/.
[326] 28DGTL. Advanced Cloud and High-performance computing Education for a Valiant Europe (ACHIEVE). https://www.eitdigital.eu/eu-collaborations/achieve/.

Table 90. % of women students in EIT Digital programmes/Average DESI for Human Capital development in Europe

Impact indicators	Targets	Impacts achieved
% of women students in EIT Digital programmes Average DESI for Human Capital development in Europe	% of women students: 40% % of women professionals employed in science and technology (STEM): 35% by 2024. % of women students: 50% % of women professionals employed in science and technology (STEM): 40% by 2027.	To date, this target has not been reached. Women's participation has fluctuated across years, with the highest shares recorded in 2019 and 2023 at 30%. No consistent upward trend has been observed that would allow a reliable projection of achieving the 40% target by 2027.

2017	2018	2019	2020	2021	2022	2023[327]
59/232 25%	66/257 26%	86/288 30%	73/ 257 28%	133/531 25%	237/851 28%	138/461 30%

The participation of women in STEM fields across the EU presents a mixed picture of progress and persistent gaps. In education, women represent only one in three STEM graduates (2022)[328] and just one in five ICT specialists (2024)[329], highlighting structural underrepresentation in key disciplines central to the digital and green transitions.

Similar disparities are visible in entrepreneurship, where women make up only 24% of self-employed professionals in technical fields such as science, engineering, and ICT (2021).[330]

In the labour market, women's overall presence in science and technology occupations is relatively strong. In 2023, of the 78,3 million people employed in science and technology, 52% were women, although this figure reflects a concentration in service-oriented activities rather than technical or engineering roles.[331]

Within the narrower category of scientists and engineers, women accounted for 41% in 2023, a share that has increased only marginally (by one percentage point) since 2013. Nonetheless, in absolute terms, the number of women in these professions grew substantially over the last decade, from 5,1 million in 2012 to 7,7 million in 2023, an increase of 50%.[332]

In this case, when accounting for all women representation in STEM, the EIT Digital was able to reach the target.

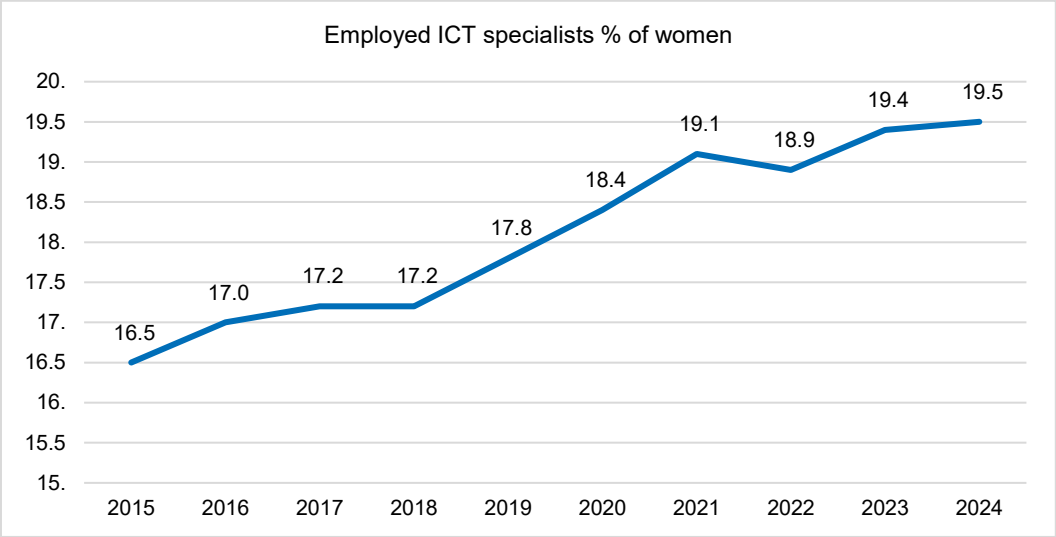
[327] EIT internal monitoring data, KPI EITHE09 – by the gender of student.
[328] European Commission. Shaping Europe's digital future. Women in Digital. https://digital-strategy.ec.europa.eu/en/policies/women-digital.
[329] European Commission. (2024). Shaping Europe's digital future. State of the Digital Decade 2024 report. https://digital-strategy.ec.europa.eu/en/factpages/state-digital-decade-2024-report.
[330] European Commission: Directorate-General for Research and Innovation, She figures 2021 – Gender in research and innovation – Statistics and indicators, Publications Office, 2021, https://data.europa.eu/doi/10.2777/06090.
[331] Eurostat. Women make up 52% of science & technology employment .https://ec.europa.eu/eurostat/web/products-eurostat-news/w/ddn-20240613-2.
[332] Ibid.

% of women professionals employed in science and technology (STEM)

52%[333]

Since 2015, the share of women working in ICT has shown only limited progress. According to Eurostat data on employed ICT specialists by gender, women continue to represent a small minority of the workforce, with only marginal increases recorded over the past decade. While the overall number of ICT jobs has grown significantly during this period, women's participation has not kept pace, leaving their share of ICT employment largely unchanged (Figure 51).

Figure 51. Employed ICT specialists employed - % of women (2015-2024)



Source: Ecorys, based on Eurostat[334]

[333] Ibid.
[334] Eurostat. Employed information and communications technology (ICT) specialists by sex. https://ec.europa.eu/eurostat/databrowser/view/isoc_sks_itsps/bookmark/table?lang=en&bookmarkId=52064aeb-a111-49b4-ab71-9ef2348629e3&c=1709201404697.

Impact attribution

The combined indicators “% of women students in EIT Digital programmes” and “Average DESI for Human Capital development in Europe” aim to capture EIT Digital’s contribution to promoting gender equality in digital education and, more broadly, in the digital economy. These indicators reflect two dimensions:

- Direct participation: the share of women students in EIT Digital’s education programmes.
- System-level progress: trends in gender representation in STEM and ICT professions, as reflected in DESI and Eurostat data.

EIT Digital set ambitious targets: 40% women participation in its programmes by 2024 and 50% by 2027, alongside a proxy target of 35% women professionals in STEM by 2024 and 40% by 2027. To date, these targets have not been met. Women's participation in EIT Digital programmes has fluctuated between 25% and 30% since 2017, peaking at 30% in 2019 and 2023, without a consistent upward trend. This suggests that, despite targeted efforts, structural barriers remain.

When compared with the latest available EU benchmarks and acknowledging that these refer to different indicators and years, EIT Digital’s women participation in 2024 (30%) is below the EU average for STEM graduates (32,8% in 2021) but significantly higher than the share of women among ICT specialists (19,5% in 2024). These comparisons provide context rather than direct equivalence, as structural gender gaps in STEM and ICT evolve slowly over time. Overall, this suggests that EIT Digital programmes attract women at higher rates than the ICT labour market but still fall short of both its own targets and the level needed to close systemic gaps.

The attribution of women’s participation in EIT Digital programmes to the organisation is direct and strong, as these figures are based on its own enrolment data. However, the link between EIT Digital’s actions and broader gender equality trends in Europe is indirect, as it is influenced by multiple actors, national policies, and cultural factors.

Table 91. Impact attribution "% of women students in EIT Digital programmes/Average DESI for Human Capital development in Europe"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
% of women students in EIT Digital programmes Average DESI for Human Capital development in Europe	This combined indicator measures progress toward gender equality in digital education and employment. It includes: a) The share of women students in EIT Digital programmes, which reflects the organisation's direct efforts to promote inclusivity. b) broader trends in gender representation in STEM and ICT professions, as captured by DESI and Eurostat data. The logic is that increasing women's participation in EIT Digital programmes helps narrow gender gaps in the digital economy.	**Mixed attribution** – Direct for EIT Digital programme participation; indirect for DESI and labour market indicators, which are influenced by multiple actors and policies.	**Moderate –** Internal enrolment data is reliable and disaggregated by year. External benchmarks (Eurostat, Women in Digital Scoreboard) provide robust context but are not sufficient to isolate EIT Digital's contribution.	**Comparability:** EU benchmarks refer to different years and indicators; comparisons are contextual, not direct equivalence. **External Factors:** Cultural norms, education systems, and labour market dynamics strongly influence outcomes. **Scope Limitation:** Indicator measures participation, not outcomes such as career progression or leadership roles.

4.2.3.5 Increased influence of EIT Digital on Digital Innovation Hubs

Presence of EIT Digital partners among the European Digital Innovation Hubs

European Digital Innovation Hubs (EDIHs) serve as one-stop shops that help businesses and public sector organisations navigate digital transformation and enhance their competitiveness. They offer access to technical expertise, testing environments, and "test before invest" opportunities, enabling organisations to explore digital solutions before committing to them. EDIHs also provide innovation services such as financing advice, training, and skills development, with a strong focus on sustainability and circularity. Their regional presence allows for tailored support in local languages and ecosystems, while their integration into a broader pan-European network enables knowledge sharing and access to specialised services across borders.

The EDIH network was launched under the Digital Europe Programme, with 136 hubs selected in the first call and an additional 15 added later to fill regional gaps. Funding is shared equally between the EU and national or regional sources, with national authorities responsible for selecting candidate hubs. High-quality proposals that did not receive EU funding were awarded a Seal of Excellence and may still join the network if supported locally. Looking ahead, the 2025 AI Continent Action Plan aims to leverage the EDIH network to expand AI-related training for SMEs and startups.

The Digital Transformation Accelerator (DTA) supports the network's coordination, including performance monitoring through a Digital Maturity Assessment tool developed by the Joint Research Centre. EDIHs are also encouraged to collaborate with other EU networks, such as the Enterprise Europe Network (EEN) and European Industrial Clusters, to offer seamless, integrated services to local businesses.[335]

KIC positions itself as a gateway to European digital innovation, building on its strong partner network and ecosystem-building role. Its influence is pursued through three key mechanisms. First, EIT Digital ensures that partners are structurally involved in governance. The General Assembly includes all members, offering voting rights linked to their engagement and sustainability contributions, thereby allowing for optimal representation and strong partner engagement.

Second, EIT Digital maintains open and transparent processes. The partnership is fully open, with clearly defined and publicly available criteria for becoming a partner. Calls for proposals are open to both KIC and non-KIC partners, while results are published for transparency. This openness facilitates the integration of a potentially broad spectrum of actors into both KIC and activities. Third, EIT Digital drives thought leadership within the digital innovation ecosystem. Initiatives such as the **Makers and Shapers**[336] bring together industry leaders and policymakers to exchange perspectives on digital innovation.[337]

The following Table 92 provides an overview of the impacts achieved for KPI Presence of EIT Digital partners among the European Digital Innovation Hubs.

[335] European Commission. Shaping Europe's digital future. European Digital Innovation Hubs. https://digital-strategy.ec.europa.eu/en/policies/edihs .
[336] 28DGTL. Perspectives on making and shaping a strong digital Europe. https://www.eitdigital.eu/our-messages/makers-shapers/.
[337] EIT Digital Strategic Agenda 2021-2027.

Table 92. Presence of EIT Digital partners among the European Digital Innovation Hubs

Impact indicators	Targets	Impacts achieved
Presence of EIT Digital partners among the European Digital Innovation Hubs	50% of EDIHs include EIT Digital Partners by 2024 75% of EDIHs include EIT Digital Partners by 2027	Since the European Commission's 2022 selection process, EIT Digital has been active in eight approved EDIH consortia and received a "seal of excellence" for two further bids in Italy. These include participation in initiatives in Finland (FAIR, Robocoast), Germany (pro_digital), the Netherlands (North and South Netherlands), Spain (Madrid Region), Sweden (Health Data), and Hungary, where EIT Digital leads EDIH Digitaltech through its Budapest Node, focusing on cybersecurity and fintech.[338] By 2024, EIT Digital was part of five active consortia and continued to expand its engagement through activities such as Calls for Accelerator, a Pilot programme, and a Booster call involving all participating KICs. These efforts underline EIT Digital's contribution to strengthening Europe's digital innovation ecosystem. The KIC brings to EDIHs a broad range of expertise, from acceleration services for start-ups and the organisation of hackathons to solution scouting and training through its Professional School and Summer School programmes.[339] The participation of partners in the EDIH has not yet been reported.[340]

[338] 28DGTL. EIT Digital successfully participates in eight European Digital Innovation Hubs. https://www.eitdigital.eu/newsroom/news/2022/eit-digital-successfully-participates-in-eight-european-digital-innovation-hubs/.
[339] EIT Digital impact data, EIT internal monitoring.
[340] The structure of the data available did not allow for matching the available information about the EDIH beneficiaries and the EIT Digital partners.

Impact attribution

The indicator “Presence of EIT Digital partners among the EDIHs” is designed to measure EIT Digital’s contribution to shaping Europe’s digital innovation ecosystem by leveraging its partner network within the EDIH framework. While the KPI focuses on partner presence, the available evidence relates to EIT Digital’s direct participation in EDIH consortia, which serves as a strong proxy for influence.

As of 2024, data on the presence of EIT Digital partners across all EDIHs has not been reported, meaning that progress against the quantitative target (50% of EDIHs by 2024) cannot yet be assessed. Despite this data gap, EIT Digital’s direct involvement in the EDIH network is significant, as outlined in Table 92 above.

Although the KPI measures presence, which is a direct and verifiable indicator of engagement, the broader objective (increased influence on the EDIH ecosystem) is more complex. Influence depends on multiple factors, including the depth of engagement, the role played within consortia, and the ability to shape strategies and services. Furthermore, the overall development and performance of the EDIH network result from a complex interplay among multiple actors, national policies, and EU-level initiatives. Therefore, while EIT Digital’s engagement is meaningful and strategically relevant, attributing systemic outcomes solely to EIT Digital would not be accurate or methodologically sound.

Table 93. Impact attribution: “Presence of EIT Digital partners among the European Digital Innovation Hubs”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Presence of EIT Digital partners among the European Digital Innovation Hubs (EDIHs)	This indicator measures the extent to which EIT Digital’s partner organisations are represented in EDIH consortia. The logic is that partner presence reflects EIT Digital’s influence in shaping Europe’s digital innovation ecosystem and leveraging its network to support EU digitalisation goals.	**Direct attribution** – input indicator (EIT Digital’s participation in EDIHs results from its own strategic actions)	**Moderate** – Qualitative evidence confirms EIT Digital’s presence and leadership in multiple EDIHs, but quantitative data on partner presence across all EDIHs is missing.	**Data Gap:** No official reporting on partner presence; hence, the indicator cannot be fully assessed. **Scope Limitation:** Indicator measures presence, not depth of engagement or impact on digital transformation.

4.3 EIT InnoEnergy

EIT InnoEnergy's vision is to be the leading driver of innovation and entrepreneurship in sustainable energy. Its mission is to establish and manage a sustainable, long-term operational framework among the three key Knowledge Triangle actors, industry, research, and higher education, in the energy sector, so that their combined impact on innovation (talent, technology, companies) is more effective and powerful than if they operated independently. This integrated approach is referred to as "the trusted ecosystem," which also encompasses consumers, investors, and public and governmental organisations.

EIT InnoEnergy differentiates innovation from research and commercial activities, emphasising the need for distinct parties, dynamics, management, and values like trust within its ecosystem.

In their Strategic Agenda 2021-2027, their unique value proposition lies in boosting innovations with added-value services across ten dimensions: team development access to finance, market analysis, technology development, growth, industrialisation, regulation, intellectual Property, governance, and outreach. As further stated in the Strategic Agenda, the aim is to continuously contribute to EU 2030 goals by designing, developing, and deploying commercially viable innovations that address energy, societal, and economic challenges.[341]

EIT InnoEnergy has defined eight Strategic Objectives for the 2021-2027 period, all aligned with its overarching vision and mission:

- By 2027, become the " **Go-to**" trusted innovation ecosystem in sustainable energy for the EU and the US.
- EIT InnoEnergy has already built and managed a trusted ecosystem with over 1400 partners across various sectors and 23 countries, reaching 150 million energy consumers indirectly[342]. The goal is to be the **preferred ecosystem for impact-minded innovators** in both the EU and US, with a particular focus on fully covering EIT RIS countries by investing more than 40% of yearly resources there.
- Be the trusted, unbiased vehicle used by EU and Member States policymakers to **lead the early mover implementations of the Green Deal** by 2027. The goal is to consolidate and strengthen EIT InnoEnergy's position as a key driver of clean energy innovation. Achieve financial independence. EIT InnoEnergy aims for a financial model in which for every EUR 1 in costs incurred, EUR 2 in value is created and monetised.
- Expand geographically to the US, becoming the **top transatlantic player** by volume by 2027. EIT InnoEnergy intends to achieve over 100 supported venture landings (cumulated) in both the US and EU, leveraging strategic alliances. This also involves creating trusted landing paths for EU assets in the US and for US ventures in Europe.
- Secure **long-term strategic sustainability** by enabling three strategic value chains by 2027.
- Have 10 EIT InnoEnergy assets (products/companies) become **world leaders**, branded as "powered by EIT InnoEnergy," with sales of USD 100 million/year each by 2027.
- Secure a culture of **systemic innovation** based on individuals (game changers), with 50 C-level leaders of TOP 500 Innovative companies being active EIT InnoEnergy community members.

[341] EIT InnoEnergy Strategic Agenda 2021-2027.
[342] EIT InnoEnergy Impact Report 2024.

- Structure **EIT InnoEnergy RIS activity** in the form of a centralised network of a central KIC activity management unit and local operational arms constructed on partnerships under the form of EIT InnoEnergy Hubs.[343]

These overarching Strategic Objectives guide the overall direction of EIT InnoEnergy. They are further operationalised into more specific economic, societal, and environmental objectives, achievements and impacts. The table in the Annex 3 summarises the societal objectives and impacts, as outlined in the Strategic Agenda and aligned with the EIT Impact Framework. Only Societal Impacts (as per Impact Framework) are included; additional objectives and impacts presented in the Strategic Agenda are not reflected in this summary.[344] Objectives highlighted in bold were selected for analysis.

4.3.1 Impact pathway

EIT InnoEnergy defined impacts and results based on two key expectations:

- A "U-shaped" recovery from the COVID-19 crisis, with Q4 2021 GDP in EU countries returning to pre-pandemic levels.
- Half of the 30% Green Deal Next Generation EU-related investments (approximately EUR 100 billion) will support medium-term structural changes.

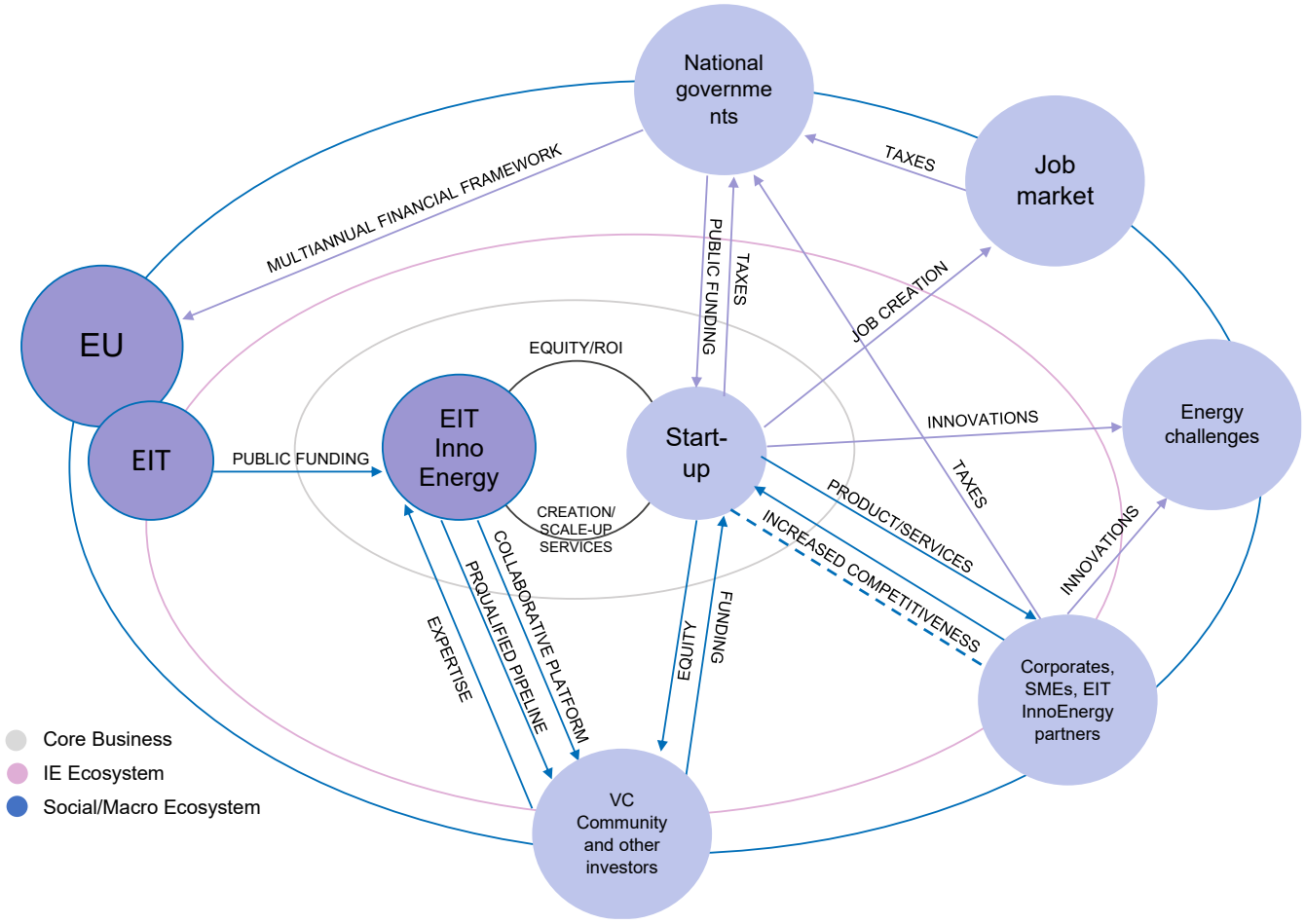
According to the Strategic Agenda, the impact pathway focuses on three core variables within the energy sector: reducing energy costs, enhancing the operability and security of the energy system, and lowering greenhouse gas emissions.

In terms of growth and competitiveness, the expected impacts include job maintenance and creation, increased competitiveness of European industry, and higher tax revenues (e.g. VAT and income tax).

The following Figure 52, taken from the Strategic Agenda's impact pathway[345], illustrates a broader range of impacts and linkages beyond those related solely to societal impacts. EIT InnoEnergy emphasises that impacts and results across different areas are interconnected, and the graph reflects this integrated approach.

[343] Ibid.
[344] It should be noted that the straightforward connection between the eight objectives defined in the Strategic Agenda and the ones that are provided there in relation to expected impacts, is not mentioned in the document, so the relation between the two sets of objectives is assumed.
[345] EIT InnoEnergy Strategic Agenda 2021-2027, p. 17.

Figure 52. EIT InnoEnergy – impact pathway



Source: Ecorys, based on EIT InnoEnergy

4.3.2 Overview of the main achievements

Key achievements[346]

- ✓ **Over 1 400 partners across 23 EU Member States.**
- ✓ **Approx. 450 ventures supported, which are expected to generate EUR 72,8 billion in investments and save 1,1 gigatons of CO2 annually by 2030.**
- ✓ **Attracted EUR 9,5 billion in investments for supported start-ups, achieving a leverage factor of 11.**

[346] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025; The data presented in this section draw on two complementary sources: (1) internal monitoring information collected by the European Institute of Innovation and Technology (EIT), including partner registries, project-level reporting, and annual KIC performance submissions; and (2) the official annexes to the European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024). These annexes accompany the Communication "Horizon Europe: Research and Innovation at the Heart of Competitiveness", SWD(2025) 110 final (Brussels, 30 April 2025), and contain the consolidated, validated quantitative indicators for each EIT Knowledge and Innovation Community (KIC). The combination of these sources provides the most up-to-date, Commission-validated overview of partner participation and financial flows under the current grant cycle.

- ✓ **255 patent applications filed.**
- ✓ **Leading major European industrial alliances, notably the European Battery Alliance, European Solar PV Industry Alliance, and European Green Hydrogen Acceleration Centre.**
- ✓ **1 746 students graduated from EIT InnoEnergy's Master's programmes, reskilled more than 32 000 professionals, and trained over 100 000 learners in non-degree programmes.**

EIT InnoEnergy, launched in 2010, has become a central engine for Europe's green energy transition, focusing on innovation, entrepreneurship, and education across the sustainable energy sector. Its activities align closely with the European Green Deal and have delivered significant scientific, societal, economic, and technological impacts. The KIC is moving toward financial sustainability, and over 80% of income comes from its own resources, ensuring strong financial sustainability as EIT funding phases out.

The KIC has delivered transformative impacts in advancing Europe's energy transition: scaling innovation, reducing emissions, generating clean energy, creating jobs, and building strategic value chains. Its integrated approach spans business creation, education, and industrial alliances and has positioned itself as a key driver of sustainable growth, energy security, and global competitiveness for the EU.

EIT InnoEnergy supported approximately 450 companies by the end of 2024, having screened over 7 000 start-ups since inception. It has invested in over 200 portfolio companies, which are expected to generate EUR 72,8 billion in revenue and save a total of 2,1 gigatons of CO_2 by 2030. 420 products have been launched on the market, with a clear focus on technological innovation and hardware solutions in areas such as energy efficiency, renewables, smart grids, energy storage, and clean mobility.

The portfolio companies have filed over 250 patents, including 90 patent applications reported in 2021-2022 alone, exceeding targets and demonstrating strong innovation output.

EIT InnoEnergy leads major European industrial alliances, such as the **European Battery Alliance, the European Solar PV Industry Alliance, and the European Green Hydrogen Acceleration Centre**, which are shaping strategic value chains and new industrial markets for Europe.

KIC's impact reports[347] present strong evidence on the environmental and societal impact of the EIT InnoEnergy activities. **The KIC has already enabled a generation of 616 TWh of clean energy, with 503 000 households in developing countries gaining access to clean energy by 2022, far surpassing targets.** Its portfolio is forecast to save up to 2,1 gigatons of CO2 by 2030, which is equivalent to a quarter of the EU's emissions, by accelerating the deployment of sustainable energy solutions. By 2030, supported innovations are expected to generate 831 terawatt-hours of clean energy.

Furthermore, **EIT InnoEnergy has contributed to EUR 9,1 billion in energy cost savings and aims to deliver an additional EUR 1,8 billion by 2025 through its support for start-ups and industrial alliances.**

By 2022, EIT InnoEnergy had created 39 112 direct and indirect jobs, exceeding its 2025 target of 30 000. The battery value chain alone has led to over 4 million jobs, with 50 000 learners trained by 2023 for this sector.

EIT InnoEnergy has attracted EUR 9,5 billion in investments for supported start-ups, achieving a leverage factor of 11 meaning **every euro of EIT funding has attracted EUR 11 in external investment**. It aims for a market value of EUR 390 billion by 2025, driven by the growth of its supported companies and the expansion of its strategic value chain.

[347] EIT InnoEnergy (2023) Impact Report 2022, EIT InnoEnergy (2025) Impact Report 2024

In the field of education and skills development, 1746 students have graduated from EIT InnoEnergy's Master's programmes, with 94% employed within six months of graduation and 83% working in Europe. The KIC also reskilled more than 32 000 professionals and has been instrumental in filling skill gaps in the energy sector. Its non-degree programmes have trained over 100 000 learners, particularly for the battery industry, supporting the development of a stable and skilled workforce.

EIT InnoEnergy's ecosystem includes over 1 400 partners across 23 EU Member States,[348] integrating education, research, and business. Its network is a trusted platform for collaboration among industry leaders, SMEs, academia, and public authorities. Furthermore, the KIC's RIS effectively supports innovation in moderate and modest innovator regions, bridging gaps through training, start-up support, and collaborative projects.

The KIC was ranked the second-most active energy investor worldwide in 2023 by PitchBook on 1 March 2024 and is recognised for its impact-driven investment strategy and leadership in the energy transition.[349] Its Innovation Director received the Nobel Sustainability Trust Award, reflecting the KIC's leadership in sustainable innovation.

4.3.3 Selection of societal impacts

4.3.3.1 Ensuring the workforce in the InnoEnergy field

% of alumni who continue their work in the InnoEnergy field, battery sector

The green transition is one of the most significant transformative trends shaping the European Union, driven by climate-change mitigation and adaptation efforts that demand substantial organisational and systemic changes. Over the past two decades, renewable energy has steadily expanded its role in the EU energy mix. The share of renewables in gross final energy consumption increased from 9,6% in 2004 to 16,7% in 2013 and reached 24,6% in 2023. The only setback occurred in 2021, when energy demand rebounded after COVID-19 restrictions were lifted, temporarily reducing the share of renewables.[350]

The EU has set an ambitious target of 42,5% renewables by 2030. In 2023, renewables accounted for 46% of total EU energy production, making them the largest energy source, ahead of nuclear (29%), solid fuels (17%), natural gas (5%), and crude oil (3%). Electricity consumption data further highlight this trend: of the 23% of final energy consumed as electricity in 2023, 44% originated from renewable sources, 31% from fossil fuels, and 23% from nuclear power. Within renewables, wind energy represented the largest share (18%), followed by hydropower (12%), solar (9%), and biofuels (5%). Despite this progress, significant differences remain across EU Member States.[351]

Battery technology is a critical enabler of the renewable energy transition. As renewables' share grows, batteries are essential for climate-friendly mobility and maintaining grid stability. Global demand for lithium-ion (Li-ion)

[348] Partner-ecosystem figures are drawn from EIT InnoEnergy's official reporting to the EIT – specifically its most recent Business Plan and annual performance reports submitted under the EIT monitoring framework – as well as consolidated data referenced in the annexes to the European Commission's Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024), SWD(2025) 110 final (Brussels, 30 April 2025). These documents provide the validated, Commission-accepted overview of the size and geographical distribution of the InnoEnergy partner community.
[349] EIT. (2025) EIT InnoEnergy ranks #1 most active VC investor globally in energy in 2024. https://www.eit.europa.eu/news-events/news/eit-innoenergy-ranks-1-most-active-vc-investor-globally-energy-2024
[350] Eurostat. Shedding light on energy in Europe – 2025 edition. https://ec.europa.eu/eurostat/web/interactive-publications/energy-2025#renewable-energy.
[351] Ibid.

batteries is projected to increase dramatically, from around 700 gigawatt hours in 2022 to 4700 GWh by 2030, a more than sixfold rise.[352] This surge will be driven primarily by electromobility and stationary battery storage. Electric vehicle battery demand alone is expected to increase 4,5 times compared to 2023,[353] while stationary storage installations worldwide are projected to exceed 400 gigawatts by 2030, representing a fifteenfold increase over the 2021 level.[354]

The expansion of renewables and the EU's climate neutrality ambitions are reshaping the labour market and creating a strong demand for new skills. The European Green Deal (see section on EIT Climate-KIC for more details), coupled with energy transition targets, is expected to generate substantial growth in energy-related employment while also increasing the need for upskilling and reskilling to address emerging requirements. Filling skill gaps and overcoming skill shortages have become critical to accelerating the transition, and a qualified workforce will be needed to support innovation, new business ventures, and the scaling of clean technologies.[355]

Specialised roles in the energy sector are among the fastest-growing occupations. It is estimated that approximately 1,5 million workers will need to be upskilled by 2030 to meet the requirements of the growing battery value chain.[356] Renewable energy engineers and environmental engineers are in particularly high demand.[357] However, skill gaps remain the most significant barrier to transformation across industries, including the energy sector. Beyond technical expertise, there is also demand for skills in talent management, leadership, and teaching, particularly in the context of an ageing and shrinking workforce in higher-income economies and expanding working-age populations in lower-income regions.[358]

Education and training systems need to adapt quickly to sustain the pace of the green transition. This includes preparing students to enter and lead in energy-related fields, retaining alumni within the InnoEnergy ecosystem, and aligning curricula with the evolving needs of industry.[359] The combined pressures of technological advancement, demographic change, and climate goals underscore the urgency of building a resilient and future-ready workforce capable of driving the EU's energy transition.

Currently, EIT InnoEnergy has initiatives to answer those needs.

- **Masters+** programme is a two-year international Master's pathway designed for students pursuing careers in sustainable energy. Participants have an opportunity to study at two leading European universities (out of many partnering universities across Europe) and graduate with a double master's degree in a field related to energy engineering. The programme combines academic training with practical experience through consulting projects and an industry internship. In addition, students complete certifications in innovation and entrepreneurship, as well as training in AI and data science. Graduates receive the EIT Label.[360]

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[352] McKinsey & Company. (2023). Battery 2030: Resilient, sustainable, and circular. https://www.mckinsey.com/industries/automotive-and-assembly/our-insights/battery-2030-resilient-sustainable-and-circular.
[353] IEA. Outlook for battery and energy demand. https://www.iea.org/reports/global-ev-outlook-2024/outlook-for-battery-and-energy-demand.
[354] Bloomberg. (2022). Global Energy Storage Market to Grow 15-Fold by 2030. https://about.bnef.com/insights/commodities/global-energy-storage-market-to-grow-15-fold-by-2030/.
[355] World Economic Forum. (2025). The Future of Jobs Report 2025. https://www.weforum.org/publications/the-future-of-jobs-report-2025/; Eurostat. Shedding light on energy in Europe – 2025 edition. https://ec.europa.eu/eurostat/web/interactive-publications/energy-2025#renewable-energy; European Union. (2023). European Climate Pact. New skills and jobs for Europe's green future. https://climate-pact.europa.eu/news-and-events/pact-articles/new-skills-and-jobs-europes-green-future-2023-04-28_en.
[356] Fraunhofer Institute for Systems and Innovation Research ISI. (2024). Battery research. Will the development of a European battery ecosystem fail due to a shortage of skilled labour?. https://www.isi.fraunhofer.de/en/blog/2024/batterieforschung-kuerzung-foerderung-folgen-aufbau-oekosystem-europa-deutschland-fachkraefte-mangel.html.
[357] World Economic Forum. (2025). The Future of Jobs Report 2025. https://www.weforum.org/publications/the-future-of-jobs-report-2025/.
[358] Ibid.; the issue of skills gaps is further explored in the 2025 Skills Institute report, https://innoenergy.com/news-resources/powering-the-net-zero-transition/.
[359] EIT InnoEnergy Strategic Agenda.
[360] InnoMasters+. MASTERS+ Fast-track your career in sustainable energy. https://mastersplus.innoenergy.com

- **InnoEnergy Skills Institute** (formerly European Battery Alliance Academy) is focused on strengthening workforce capabilities in the green energy sector. It provides tailored upskilling solutions in key areas such as battery technologies, solar energy, and green hydrogen, with the aim of preparing professionals for the demands of a fast-evolving clean tech market. Its activities include developing specialised training programmes, maintaining a job roles catalogue covering more than 145 positions, as well as recruitment and certification support via Talent Pipeline as a Service (TPaaS). Working in collaboration with industry alliances, including EBA250 and ESIA, the institute aligns training with sector needs to address skills gaps and enhance competitiveness.[361]

The following Table 94 provides an overview of the impacts achieved for the KPI % of alumni who continue their work in the InnoEnergy field, battery sector.

[361] InnoEnergy. Delivering upskilled talent for clean tech industries. https://innoenergy.com/skillsinstitute/, InnoEnergy. (2025). Powering the Net Zero Transition: A Report. https://innoenergy.com/news-resources/powering-the-net-zero-transition/.

Table 94. % of alumni who continue their work in the InnoEnergy field, battery sector

Impact indicators	Targets	Impacts achieved
% of alumni who continue their work in the InnoEnergy field, battery sector	40% by 2025, 50% by 2027	The data on the number of alumni from EIT InnoEnergy education programmes retained in the battery sector is limited and based on assumptions. Furthermore, the figures are not presented as percentages, although these could be calculated. However, due to the incomplete nature of the data, such percentages may not accurately reflect the actual achievements and impacts. The issue can be approached from two perspectives. The first concerns the alumni of the EIT Labelled programmes (MSc and PhD), and the second concerns the Battery Alliance Academy, a highly successful industry-tailored initiative. By 2024, a total of 1746 students had graduated from the EIT InnoEnergy EIT Labelled MSc/PhD programmes. This suggests that to achieve the targets, about 1000 should be employed in the battery sector. This level of granular data, as of 2025, is not yet available. Internal data about these alumni indicates that 83% are contributing their talent within Europe. Additionally, 65 alumni are employed across approximately 15% of EIT InnoEnergy portfolio companies.[362] Alumni have founded 55 companies. According to internal data from EIT InnoEnergy, the majority of sampled alumni are employed in the energy technology and equipment provider sector, followed by energy utilities and producers, consulting and professional services, high-tech and advanced manufacturing, and academia and research. In terms of professional function, alumni predominantly occupy roles in engineering and sales/business development.[363] **Alumni** By 2024, graduates of EIT InnoEnergy EIT Labelled MSc/PhD programmes: 2 193 **Start-ups created from EIT-labelled MSc/PhD programmes**

2017	2018	2019	2020	2021/2022	2023[364]	2024[365]
4	3	7	9	14	6	11

[362] EIT InnoEnergy EIT Alumni report, internal material.
[363] Ibid.
[364] European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025, Annex 25 Evaluation of EIT InnoEnergy.
[365] EIT Internal monitoring data, KPI EITHE05.1.

Types of companies employing alumni[366]	
Consulting and professional services[367]	20
High-tech and advanced manufacturing[368]	19
Energy utilities and producers[369]	70
Energy technology and equipment providers[370]	93
Academia and research	11
Profiles of alumni functions[371]	
Engineering	20%
Sales/Business Development	17%
Operations	15%
Education	9%
R&D	7%
Consulting	6%
Finance	4%

According to the latest EIT InnoEnergy's 2024 Impact Report, educational activities and talent initiatives continue to demonstrate strong results. The report states that 94% of students were employed within six months of graduation.

It was also reported that, on average, graduates earn a 15% higher annual salary than peers from similar programmes, underscoring the added value of EIT InnoEnergy training for labour market competitiveness.

144 individuals were recruited into portfolio companies between 2023 and 2024.[372]

The survey conducted as part of this study among ventures and partners included questions on two aspects: (i) filling skill gaps through the employment of KIC graduates and trainees, and (ii) filling skill gaps through participation in KIC-provided education and training.

A detailed discussion of these findings is presented in the chapter on Economic Impact Analysis. The methodological approach applied for the survey is described in Annex 1.

The results indicate that 40% of ventures reported that employing individuals trained by the KICs helped to fill skill gaps in their organisation, while 20% responded negatively, and the remainder were uncertain. Among partners, responses were more positive: 57% confirmed that KIC-trained employees helped fill skill gaps, and 14% reported no impact.

[366] EIT InnoEnergy EIT Alumni report, internal material; based on the sample of alumni.
[367] E.g. McKinsey & Company.
[368] E.g. ASML.
[369] E.g. RWE.
[370] E.g. Siemens Energy, Tesla.
[371] EIT InnoEnergy EIT Alumni report, internal material; based on the sample of alumni.
[372] EIT InnoEnergy Impact Report 2024, https://innoenergy.com/news-resources/innoenergy-impact-report-2024/.

Participation in KIC-provided education and training was regarded as valuable. Three-quarters (75%) of ventures responding to the survey stated that such participation helped fill skill gaps in their organisations, while half (50%) of partners reported the same effect.

An additional survey conducted by the JRC, further detailed in the chapter on Economic Impacts, provides valuable insights into participants' experiences in EIT KIC educational activities. Respondents were asked to what extent EIT-labelled programmes helped them develop the skills, networks, or support needed for entrepreneurship and innovation. Among EIT InnoEnergy respondents, 21% rated the impact as extremely, 47% as very, 25% as moderately, and 7% as slightly, with no respondents selecting not at all.

The survey also highlighted measurable outcomes beyond skills development. 36% of EIT InnoEnergy respondents reported an increase in their annual net income, the highest figure across all KICs. In addition, 17,6% indicated that they had launched an innovation, either within an existing company or through their own start-up, during or after participation in an EIT-labelled programme.

89% of respondents reported being employed after completing an EIT-labelled programme, and 77% reported being employed in a sector directly relevant to the programme. If based on this study alone, the targets for employability and sector relevance have not only been met but exceeded.

The Final review of EIT InnoEnergy[373] also provides insights into the career pathways of its alumni, also based on survey responses. While the limited number of responses does not allow for drawing statistically valid trends, some general observations can be noted.

In terms of the long-term impact of EIT-labelled programmes on career growth, there appears to be a pattern in which many graduates do not necessarily transition directly from internships to more advanced or stable roles. Instead, a significant proportion remain in entry-level, intermediate, or executive-level positions over time. The relatively stable presence of alumni in senior roles is a positive signal, suggesting that the programmes contribute to career progression at higher levels. Nevertheless, it is important to note that career trajectories are shaped by a range of individual circumstances and external factors.[374]

Although no data is currently available regarding the employability of Battery Alliance Academy – European Battery Academy – alumni, it is expected to contribute significantly to this KPI, as enhancing employability was a core objective of its establishment.

It emerged in the context of the European Commission's support for the European Battery Alliance, an industrial partnership created to accelerate the development of a competitive European battery industry. A critical challenge identified by stakeholders was the shortage of skilled professionals, a gap expected to

[373] Final Review of the 1st Wave KICs: EIT InnoEnergy. Final Report. https://www.eit.europa.eu/sites/default/files/2024-01/Final%20review%20of%20EIT%20InnoEnergy_Report.pdf
[374] Final review of EIT InnoEnergy.

widen as the sector expands. In response, the Commission, through DG EMPL and the ESF+ Technical Assistance Facility, made EUR 10,2 million available to fund skills development in the battery sector.

Based on a technical proposal from EIT Budapest, a contribution agreement was established, with implementation entrusted to EIT InnoEnergy. EIT InnoEnergy's role was to design and deliver training content tailored to industry needs, while also building the capacity of local training providers across Member States. The targets defined in the grant agreement, covering numbers of learners, trainers, modules, and cooperating providers, were achieved.[375]

A defining strength of EIT in this process has been its ability to connect both with governmental institutions and with industry stakeholders. This dual positioning enabled the Academy to design courses that reflected policy priorities while remaining grounded in the practical requirements of businesses.

EIT InnoEnergy through the Academy is widely recognised in the market as a reliable partner for reskilling and upskilling, with industry actors acknowledging that the training provided was well-tailored to their needs.[376]

To date, Academy has engaged over 100 000 direct learners and reached an additional 700 000 indirectly. A total of 110 trainers have been successfully trained, supported by a network of 4 000 local training providers. The Academy has developed over 100 courses, made available in 10 languages, and formalised its commitment to public sector engagement through 13 Memoranda of Understanding signed with governments.[377]

Even though the sector is currently facing challenges, EIT InnoEnergy's efforts in the battery domain are acknowledged for retraining significant numbers of professionals and for laying the foundation for industry-relevant training.[378]

While the impact on employability and career pathways of the Academy's alumni remains unknown, the sheer volume of learners, combined with the European Commission's recognition of the initiative's success and its continuation across other sectors, provides a compelling argument that EIT InnoEnergy has been highly successful in achieving this objective. This success is largely attributed to the tailoring of content to meet industry needs.

[375] Interview with the representatives of DG EMPL, August 2025.
[376] Ibid.
[377] Inno Energy. European Battery Academy. https://innoenergy.com/skillsinstitute/community-programmes/european-battery-academy/.
[378] Interview with the representatives of DG EMPL, August 2025.

- **Impact highlight**

Martim Perestrelo, an alumnus of the EIT InnoEnergy Master School, has been recognised in the prestigious Forbes 30 Under 30 list, marking the eighth such honour for the institution. His academic journey, undertaken at KTH Royal Institute of Technology and UPC: Universitat Politècnica de Catalunya, laid the foundation for his entrepreneurial success.

During his thesis at Starke Energy, Martim was inspired to explore innovative energy solutions. Together with his co-founder Luis, and drawing on insights from their coursework at Esade Business School, they conceptualised Tether, a start-up aimed at transforming parked electric vehicles into an AI-powered, decentralised battery network. This solution is designed to stabilise the power grid and reduce reliance on fossil fuels. By turning parked EVs into a flexible battery network, the start-up contributes to grid stability and supports the transition away from fossil fuels.

My EIT InnoEnergy journey was great. The best thing about it is the opportunity to live in two different countries and meet so many people from such different cultures, while at the same time having excellent courses. I think the highlight was the courses at Esade and their final project of developing a start-up from scratch. This was the first time that the ideas for Tether started emerging.[379]

Martim Perestrelo

The venture gained initial traction after winning the 2022 EIT Jumpstarter competition. From there, Martim and Luis dedicated themselves to developing the project, managing everything from coding to client engagement. Their efforts were rewarded with a Letter of Intent from a Swedish charge point operator and a successful funding round. Tether's credibility was further strengthened by its acceptance into Techstars and MobilityXLab in Sweden, where the team continued to validate their concept through Proof of Concepts.[380]

Impact attribution

The indicator "% of alumni who continue their work in the InnoEnergy field, battery sector" is designed to assess EIT InnoEnergy's contribution to building and sustaining a skilled workforce in the European battery value chain. This aligns with EIT InnoEnergy's overarching objective of addressing critical skills shortages in strategic energy sectors and supporting the EU's industrial competitiveness and energy transition goals.

EIT InnoEnergy's interventions, through its EIT-labelled MSc and PhD programmes and the European Battery Academy, are explicitly structured to create pathways into the battery sector. These pathways include industry-aligned curricula, mandatory mobility across top universities, internships and Master's theses with industry partners, and large-scale reskilling programmes tailored to the needs of the European Battery Alliance. This design equips graduates with sector-specific skills and makes them highly employable.

Evidence from internal monitoring and two independent surveys supports the claim that EIT InnoEnergy is building and sustaining a skilled workforce in the European battery value chain. For example, **94% of graduates are employed within six months, and 77% report working in sectors relevant to their programme**. 144 alumni were recruited into portfolio companies between 2023 and 2024, and industry surveys confirm that KIC-trained

[379] EIT. (2024). From EIT InnoEnergy Master's Student to Forbes 30 Under 30. https://www.eit.europa.eu/news-events/news/eit-innoenergy-masters-student-forbes-30-under-30.
[380] Ibid.; EIT InnoEnergy Impact Report 2024, https://innoenergy.com/news-resources/innoenergy-impact-report-2024/.

individuals help fill skills gaps (40% of ventures; 57% of partners). The European Battery Academy has also trained over 100 000 learners, signalling a systemic impact on workforce readiness.

While these data points strongly suggest that EIT InnoEnergy plays a significant enabling role, precise attribution is constrained by the absence of harmonised sector tagging and longitudinal tracking of alumni in battery-specific roles. Broader labour market dynamics and EU-level initiatives (e.g., European Battery Alliance, ESF+ funding) also influence outcomes.

Therefore, this indicator reflects contribution rather than exclusive causality.

Table 95. Impact attribution "% of alumni who continue their work in the InnoEnergy field, battery sector"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
% of alumni who continue their work in the InnoEnergy field, battery sector	This indicator is directly linked to EIT InnoEnergy's overarching objective of ensuring a skilled workforce in strategic energy sectors, particularly the battery value chain. Tracking the proportion of alumni employed in battery-related roles reflects whether EIT InnoEnergy's education and training interventions (such as EIT-labelled MSc/PhD programmes and the European Battery Academy) are achieving their intended purpose of filling skills gaps in this sector.	**Contribution** – EIT InnoEnergy is a key enabler of battery workforce development, but outcomes are also shaped by broader EU and national initiatives and market conditions.	**Moderate –** Based on multiple internal datasets and two independent surveys: (1) EIT InnoEnergy survey of ventures and partners (skills gap closure), and (2) JRC survey of alumni (employability and sector relevance). These triangulate contributions but lack longitudinal tracking and battery-specific tagging.	**External factors:** Workforce outcomes are influenced by EU-level initiatives (European Battery Alliance, ESF+ funding), national policies, and market dynamics. **Data limitations**: No harmonised taxonomy for battery roles; incomplete alumni tracking; no longitudinal data on retention in battery-specific positions. **Attribution complexity:** Academy impact inferred from reach and stakeholder validation, not verified employment outcomes.

4.3.3.2 Gender balance promoted in the InnoEnergy field

Survival rate of a venture managed by a woman entrepreneur (in %). Investment attracted by women entrepreneurs (in MEUR).

The involvement of women in the battery and energy sector reveals a complex landscape characterised by significant underrepresentation and systemic barriers, despite increasing educational attainment and growing interest among women in climate-related fields. Women constitute only 25% of the total workforce in EU energy companies,[381] with an even lower share in R&I, standing at 22%.[382] Certain critical sub-sectors essential to the energy transition, such as heat pumps and hydrogen, exhibit the lowest representation of women in R&I and the overall workforce, respectively.[383]

Women remain severely underrepresented in senior management, executive roles, and boards of directors across the energy sector. Globally, women account for less than 14% of senior managers in energy firms, a figure lower than that observed in non-energy firms.[384] Renewable energy companies show a lower representation (10,8%) than utilities (17,1%).[385] A persistent "glass ceiling" continues to limit access to top leadership positions, with fewer than 5% of women holding roles such as CEO or board chair.[386]

Regarding workplace challenges, 66% of women in the solar photovoltaic (PV) sector report experiencing gender-related barriers.[387] These include defiance of social and cultural norms, and caused by the absence of gender targets, common hiring practices, and limited mobility. Additional obstacles include workplace sexual harassment, a lack of women role models, and insufficient work-life balance measures, particularly in relation to family responsibilities.[388] Half of the surveyed companies attribute gender imbalance to a "scarce supply of qualified women on the labour market," while 41% cite "beliefs that men are better suited for certain types of jobs than women".[389]

Women are significantly underrepresented in innovation and entrepreneurship. Between 2015 and 2018, women held only one inventorship for every ten held by men.[390] The global share of women inventors in energy-related patent classes (8–10%) is markedly lower than their share across all technologies (16%).[391] Furthermore, only around 11% of energy sector founders are women, compared with 20% across all sectors, underscoring the gender gap in start-up activity.[392]

Instruments have been developed to address gender disparities in the energy and battery sectors, although most focus on education rather than business development. Horizon Europe reinforces support for gender equality in R&I by integrating the gender dimension into R&I content and promoting gender balance. It also mandates the

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[381] European Commission/DG RTD (2023) Gender Balance in the R&I Field to Improve the Role of Women in the Energy Transition, Brussels.
[382] European Commission (2021) 'She Figures 2021: Gender in Research and Innovation: Statistics and Indicators', Luxembourg: Publications Office of the European Union.
[383] European Commission/DG RTD (2023) Gender Balance in the R&I Field to Improve the Role of Women in the Energy Transition, Brussels.
[384] Pilgrim, G., Nicholson, D.-J., Johnstone, N. (2021) 'Women in senior management roles at energy firms remains stubbornly low, but efforts to improve gender diversity are moving apace'. https://www.iea.org/commentaries/women-in-senior-management-roles-at-energy-firms-remains-stubbornly-low-but-efforts-to-improve-gender-diversity-are-moving-apace
[385] Ibid.
[386] Ibid,
[387] IRENA (2022) 'Solar PV: A Gender Perspective', Abu Dhabi: International Renewable Energy Agency.
[388] Ibid.
[389] European Commission/DG RTD (2023) Gender Balance in the R&I Field to Improve the Role of Women in the Energy Transition, Brussels.
[390] European Commission (2021) 'She Figures 2021: Gender in Research and Innovation: Statistics and Indicators', Luxembourg: Publications Office of the European Union.
[391] IEA (2023) 'Gender and Energy Data Explorer'.
[392] IEA (2020) 'Gender diversity in energy: what we know and what we don't know', Paris: International Energy Agency.

implementation of Gender Equality Plans (GEPs) for public bodies, research organisations, and higher education institutions.

The European Research Area (ERA) has prioritised gender equality and gender mainstreaming in R&I, with objectives such as the "integration of the gender dimension into the content of research and innovation." The Marie Skłodowska-Curie Actions (MSCA) offer opportunities for doctoral training that combine academic and industrial experience. However, their effectiveness in promoting gender balance within technology-focused energy transition programmes has been limited.[393]

EIT InnoEnergy recognises the underrepresentation of women in energy entrepreneurship and is implementing a policy-driven approach to address this challenge. This includes setting clear objectives, actively monitoring women applicants and supported ventures, and establishing specific targets to increase women's participation and leadership in start-ups within the sustainable energy sector. This approach is embedded in EIT InnoEnergy's 2021 Gender Mainstreaming Policy and its overall Diversity initiative, which aims to enhance women's involvement in entrepreneurship and innovation in the sustainable energy sector.[394]

One of the top-level goals of the Gender Mainstreaming Policy is for portfolio companies to meet or exceed the current representation of women who founded companies or hold CEO positions in energy-related start-ups. A concrete action within the Business Creation department is to support women entrepreneurs, with a target of more than 10% of new ventures supported to have at least one woman as a founder or CXO (CEO, CTO, CFO) by the second half of 2023.[395]

The following Table 96 provides an overview of the impacts achieved for the KPI Survival rate of a venture managed by a woman entrepreneur (in %). Investment attracted by women entrepreneurs (in million EUR).

[393] European Commission/DG RTD (2023) Gender Balance in the R&I Field to Improve the Role of Women in the Energy Transition, Brussels.
[394] EIT InnoEnergy. (2023). Gender mainstreaming policy. https://innoenergy.com/uploads/2023/01/eit-innoenergy_-gm-policy_final-2.pdf.
[395] Ibid.

Table 96. Survival rate of a venture managed by a woman entrepreneur (in %). Investment attracted by women entrepreneurs (in M EUR)

Impact indicators	Targets	Impacts achieved
Survival rate of a venture managed by a woman entrepreneur (in %). Investment attracted by women entrepreneurs (in million EUR)	75% and 500M EUR by 2025 75% and 650M EUR by 2027	Considering the challenges faced by women in the energy sector and the lack of instruments supporting their active role in business creation, EIT InnoEnergy demonstrates added value by actively supporting women entrepreneurs. The targets set forth have already been achieved. Based on the Dealroom data about the companies, as well as internal monitoring data of the EIT, the women-led companies did not close[396] and between 2017-2023 they attracted EUR 2,1 billion of investment, and since the adoption of the new Strategic Agenda and the Gender Mainstreaming Policy (2021-2023) – EUR 70,5 million.[397] For most years, only one or two companies successfully attracted investment. However, in 2021, coincidentally, the year the Policy came into force, 21 companies did so. This trend did not continue in the following years, although progress was made, with six companies attracting investment in 2022. The most successful year in terms of investment attracted was 2019. The highest number of ventures led by women that successfully secured investment were registered in Spain (8), Sweden (7), and France (5). Spanish companies were also the most successful in terms of total investment value. This outcome highlights the achievements within the context of EIT RIS countries, as Spain is considered part of this Scheme. Therefore, the result is doubly positive.

2017	2018	2019	2020	2021	2022	2023[398]
EUR 32 000 000	EUR 20 065 986	EUR 1 394 867 275	EUR 631 511 736	EUR 43 908 677	EUR 26 106 542	EUR 500 862

Additionally, by the end of 2024, EIT InnoEnergy had supported 2 457 women entrepreneurs.[399] Furthermore, of the 710 start-ups and scale-ups supported between 2017 and 2023, 661 had male CEOs, representing 91%.

The trend appears to be shifting, with the number of men CEO's falling to 77% from 91% since the adoption of the KIC's policy.[400]

However, this should be considered in the context of the barriers to more equal participation of women in the sector, as discussed above.

[396] The Dealroom data includes the information about closing time of the companies. Only one such company supported by the EIT InnoEnergy was reported, and was not women-led.
[397] KPI EITHE06 Investment attracted by KIC-supported start-ups and scale-ups (selected by gender of the owner); EIT internal monitoring data.
[398] Ibid.
[399] EIT InnoEnergy Impact Report 2024, https://innoenergy.com/news-resources/innoenergy-impact-report-2024/.
[400] KPI EITHE03 Supported start-ups/scale-ups(selected by gender of the owner); EIT internal monitoring data.

Impact attribution

The indicator pair “Survival rate of a venture managed by a woman entrepreneur (%)” and “Investment attracted by women entrepreneurs (MEUR)” captures EIT InnoEnergy’s contribution to improving women’s participation and success in energy entrepreneurship. This is a central pillar of the organisation’s Gender Mainstreaming Policy (2021) and broader diversity agenda, and particularly relevant in a sector where women remain significantly underrepresented: they account for about 11% of energy-sector founders in Europe, and women-led start-ups typically capture a very small share of venture capital – around 10–12% of total VC value when mixed-gender teams are included, and less than 2% for all-women teams.

Against this backdrop, the performance of EIT InnoEnergy-supported ventures stands out. While EU-level data show that women-led rounds are rare, highly concentrated, and often smaller in size, the portfolio of women-led ventures supported by EIT InnoEnergy has achieved survival rates above the target and attracted investment volumes that far exceed typical market shares for women founders.

The timing of the 2021 Gender Mainstreaming Policy coincides with a sharp increase in the number of women-led ventures securing investment, suggesting that targeted interventions , such as explicit gender targets, tailored coaching, and investor introductions, are having an effect. This pattern mirrors EU-wide dynamics, where a few large deals drive annual totals, but the scale achieved within the InnoEnergy portfolio is notable given the sector’s structural gender gap.

While it is not possible to attribute the entire investment volume solely to EIT InnoEnergy, given the influence of co-investors, market cycles, and other external factors, the evidence strongly supports a plausible contribution claim. The alignment of policy timing with improved outcomes, combined with the organisation’s hands-on venture support model, suggests that EIT InnoEnergy has played a significant enabling role in enhancing both survival and access to funding for women entrepreneurs in the energy sector.

Table 97. Impact attribution “Survival rate of a venture managed by a woman entrepreneur (in %). Investment attracted by women entrepreneurs (in MEUR)”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Survival rate of a venture managed by a woman entrepreneur (in %).	This combined indicator aims to increase women’s participation and success in energy entrepreneurship through EIT InnoEnergy’s Gender Mainstreaming Policy (2021) and targeted venture support mechanisms. The policy sets explicit gender targets and is implemented via tailored coaching, investor introductions, and follow-on funding instruments. The interventions are designed to reduce early-stage risk, improve survival prospects, and enhance access to capital for women-led ventures. By providing structured support and leveraging its investor network, EIT InnoEnergy seeks to close this systemic gap and enable women-led ventures to scale.	**Contribution** – EIT InnoEnergy’s interventions plausibly contributed to higher survival and improved capital access, compared with what would be expected in the absence of such targeted measures. However, outcomes are also influenced by broader market dynamics and co-investor activity.	**Moderate** – Internal monitoring and Dealroom data confirm survival and investment outcomes, and EU benchmarks show that women-led ventures typically face higher attrition and lower funding shares, which makes these results notable. However, no formal counterfactual or control group analysis has been conducted due to data availability constraints, so the contribution cannot be statistically proven.	**External factors:** Market cycles, co-investors, and national innovation policies also affect outcomes. **Data limitations:** There is no harmonised definition of “women-led” across datasets, and there is no longitudinal tracking beyond portfolio reporting. **Attribution complexity:** Later-stage rounds often involve multiple actors; hence, a full attribution of EUR 2,15 billion to EIT InnoEnergy is not possible. **Concentration risk:** A few large rounds dominate totals; sustainability depends on broadening the base.

4.3.3.3 Increased access to innovative energy

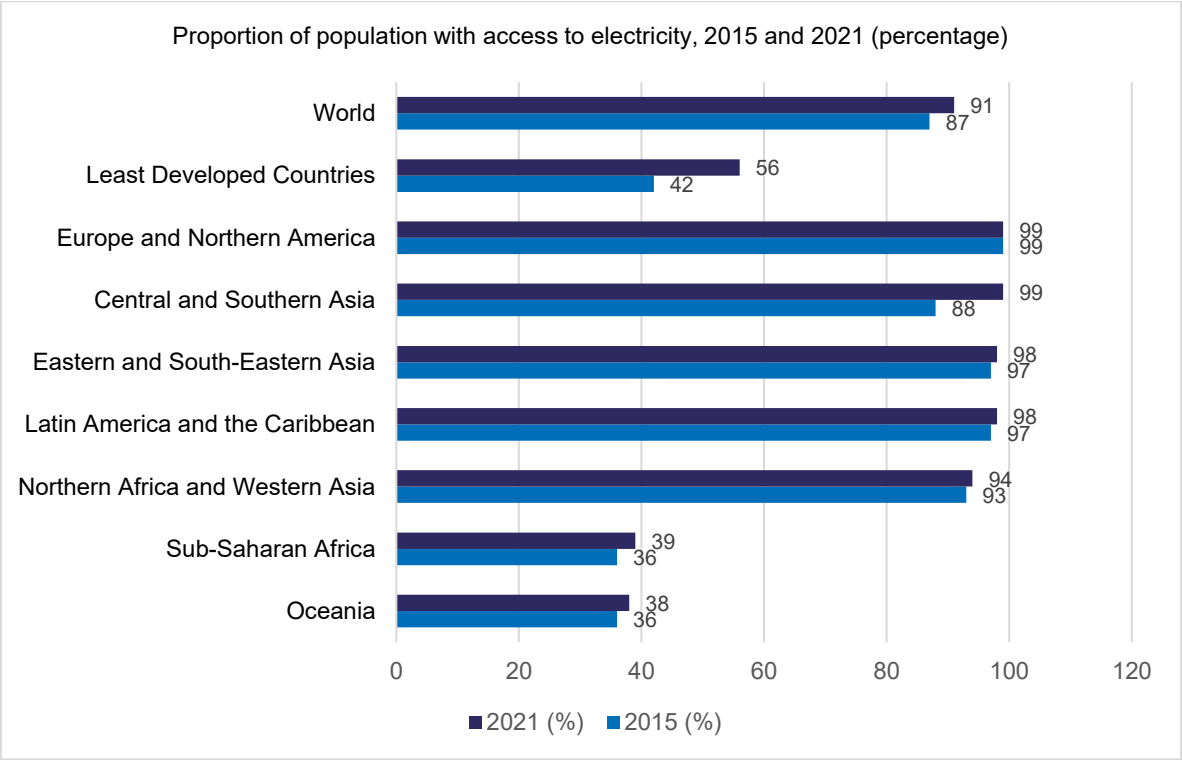
People with access to energy in developing countries thanks to InnoEnergy deployed assets.

Global progress toward sustainable energy targets is advancing, but at a pace too slow to meet 2030 goals. Despite recent improvements, about 660 million people are still projected to lack access to electricity by 2030, while nearly 2 billion will continue to rely on polluting fuels and cooking technologies.[401]

Electricity access has steadily improved in recent years, with the global access rate rising from 87% in 2015 to 91% in 2021, reaching nearly 800 million additional people. By 2023, almost 92% of the world's population had access to electricity, reducing the number of people without electricity to 666 million. However, the growth rate has slowed: between 2019 and 2021, the annual increase averaged 0,6 percentage points, compared with 0,8 between 2015 and 2019.

Sub-Saharan Africa remains the region most affected, accounting for 85% of the global electricity access deficit, or 565 million people in 2023. Eighteen of the 20 countries with the largest access gaps are located in this region.[402] To address this, e.g. Mission 300 by the World Bank and the African Development Bank aims to provide access for 300 million people in Sub-Saharan Africa by 2030, requiring more than USD 90 billion in investment.[403] Figure 53 summarises the change in access to electricity between 2015 and 2021, showing upward trends, though still significant challenges in developing countries.

Figure 53. Proportion of population with access to electricity, 2015 and 2021 (percentage)



Source: Ecorys, based on UN data[404]

[401] United Nations. Sustainable Development Goal. 7 Affordable and clean energy. https://unstats.un.org/sdgs/report/2023/goal-07/.
[402] Ibid.
[403] EA, IRENA, UNSD, World Bank, WHO (2025) Tracking SDG 7: The Energy Progress Report. World Bank, Washington.
[404] United Nations. Sustainable Development Goal. 7 Affordable and clean energy. https://unstats.un.org/sdgs/report/2023/goal-07/.

Renewable energy is expanding in developing countries but remains unevenly distributed. Installed capacity in these regions has grown rapidly, with a compound annual growth rate of 9,6% between 2016 and 2021, outpacing both population growth and the global average.[405] In 2021, developing countries achieved a record of 268 watts per capita in renewable generation capacity, contributing to a global figure of 478 watts per capita by 2023.[406] Nonetheless, disparities remain stark: developed countries averaged 1162 watts per capita in renewable capacity, compared to 341 watts in developing countries, and only 40 watts in Sub-Saharan Africa.[407]

Renewables now provide nearly 30% of global electricity consumption, yet progress in heating and transport is lagging. In 2022, the share of renewables in total final energy consumption (TFEC) was 17,9%, a gradual increase over 15 years but still insufficient to meet global targets. This shortfall is compounded by a decline in international financial flows for clean energy, even as demand in developing regions continues to grow.[408]

EIT InnoEnergy's mission is to accelerate the energy transition and help build a more sustainable world, recognising climate change as a global issue that requirs global solutions that can be implemented worldwide.[409] In its Strategic Agenda for 2021–2027, EIT InnoEnergy identifies “Growth” as one of its key Strategic Objectives (SO05). This objective is framed around the societal challenge of promoting inclusive, sustainable, and green growth while ensuring access to affordable, sustainable, and modern energy.[410] It reflects a strong commitment with the SDGs, with direct alignment to SDG 7 (Affordable and Clean Energy), as well as contributions to SDG 1 (No Poverty) and SDG 10 (Reduced Inequalities). Among these, SDG 7 is the most closely connected to this KPI.

The following Table 98 provides an overview of the impacts achieved for the KPI “People with access to energy in developing countries thanks to InnoEnergy deployed assets.”

[405] Ibid.
[406] Ibid.
[407] EA, IRENA, UNSD, World Bank, WHO (2025) Tracking SDG 7: The Energy Progress Report. World Bank, Washington.
[408] Ibid.
[409] EIT InnoEnergy Impact Report 2022.
[410] EIT InnoEnergy Strategic Agenda 2021-2027.

Table 98. People with access to energy in developing countries, thanks to InnoEnergy deployed assets

Impact indicators	Targets	Impacts achieved
People with access to energy in developing countries, thanks to InnoEnergy deployed assets	180 000 by 2025 324 000 by 2027	EIT InnoEnergy achieves this KPI through a combination of strategic investment in clean energy innovations, strong local deployment of energy assets, and an integrated support ecosystem that enables scalable, sustainable solutions. EIT InnoEnergy calculates this KPI by measuring the actual number of households that have gained access to energy through the deployment of solutions from its portfolio companies. The metric is derived from aggregate data reported by the portfolio and has been accumulated since the start of InnoEnergy's activities. For reporting purposes, the number of beneficiaries is estimated by multiplying the number of households by an assumed average of four people per household. According to the most recent update from 2022, solutions supported by EIT InnoEnergy have provided access to energy for 503 615 households worldwide.[411] At the same time, the 2024 Impact Report provides an even higher number of 2,9 million.[412] In either case, the figure has already fulfilled and exceeded the target set. **By 2022**[413] 2 014 460

[411] EIT InnoEnergy Impact Report 2024, TFS request (internal material).
[412] EIT InnoEnergy Impact Report 2024, https://innoenergy.com/news-resources/innoenergy-impact-report-2024, p. 13.
[413] EIT InnoEnergy Impact Report 2024, TFS request (internal material).

- **Impact highlight**

In Zimbabwe, where only 49% of the population has access to electricity and informal urban settlements face major electrification challenges, Next Century Power (NCP) is piloting the Hunyani Mini-grid Project in Harare South. Co-founded by InnoEnergy Masters+ graduate André Corsetti, and led by Siyapakanaka Consulting, the project delivers sustainable, affordable energy while promoting social and economic growth in Zimbabwean communities, demonstrating EIT InnoEnergy's impact in alleviating energy poverty in Africa.

The project combines solar PV generation, battery storage, and smart grid technology to provide affordable and reliable electricity. Designed to serve around 12 000 buildings, it aims to improve the quality of life, reduce household energy costs, and support local economic development. A key technical innovation is its grid-connected design, which allows surplus solar electricity to be exported and low-cost grid electricity to be purchased at night. This reduces dependence on storage, lowering overall system costs while ensuring a continuous supply.

The initiative has strong ties to InnoEnergy's education programmes. Originating from the Integrated Project of the Year (iPoY) within the InnoEnergy Masters+ in Sustainable Energy Systems, the concept was developed through collaboration between students, consultants, and local communities.

In Harare, a 6,3 MW solar PV and 10,9 MW lithium battery energy storage system (BESS) mini-grid project has advanced from concept to structured development. The feasibility phase has been successfully completed, including site identification, energy demand and affordability assessments, and social and environmental impact studies. A pilot community and generation site were selected, and the process was strengthened through workshops involving key stakeholders, including community leaders, government authorities, regulators, the national utility (ZETDC), investors, and EPC companies. The project received support and constructive feedback from both local communities and authorities, providing a solid foundation for the next steps.

The initiative has now progressed to project development, with ongoing activities including land lease negotiations, grid impact assessments with ZETDC, applications for generation and distribution licenses from the Zimbabwe Energy Regulatory Authority (ZERA), and efforts to secure funding for full implementation.[414]

Impact attribution

The indicator "People with access to energy in developing countries thanks to InnoEnergy deployed assets" captures EIT InnoEnergy's contribution to expanding access to affordable, sustainable, and innovative energy solutions in regions where energy poverty remains a critical challenge. This is highly relevant in a context where global progress remains insufficient: despite electrification rates rising from 87% in 2015 to 92% in 2023, 666 million people still lack electricity, and Sub-Saharan Africa accounts for 85% of this gap.

Against this global backdrop, InnoEnergy's contribution (though small in absolute terms compared to the global deficit) is quite significant relative to its scale and mandate. By exceeding its 2027 target, EIT InnoEnergy demonstrates that innovation-driven, decentralised solutions can complement large infrastructure programs. Its approach, combining strategic investment, local deployment, and capacity building, offers a replicable model for accelerating access in regions where traditional grid expansion is slow or economically unfeasible.

While external factors such as national policies and co-investor participation also influence outcomes, the evidence supports a plausible contribution claim: the KPI is based on actual deployments by EIT InnoEnergy portfolio

[414] InnoEnergy. (2024). InnoBlog: Next Century Power: Pioneering the Future of Energy in Africa.https://innoenergy.com/news-resources/next-century-power-pioneering-the-future-of-energy-in-africa/; LinkedIn. (2024). InnoEnergy. Pioneering Sustainable Energy in Africa!. https://www.linkedin.com/posts/innoenergy_pioneering-sustainable-energy-in-africa-activity-7209827411692056576-ud2d/; Next Century Power. Utility of the future. Building innovative energy solutions for a brighter and more prosperous Africa. https://www.nextcenturypower.com/.

companies, and the scale of results achieved relative to targets indicates that InnoEnergy has played a significant enabling role in increasing access to innovative energy in developing countries.

Table 99. Impact attribution “People with access to energy in developing countries thanks to InnoEnergy deployed assets”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
People with access to energy in developing countries, thanks to InnoEnergy deployed assets	This indicator measures EIT InnoEnergy’s contribution to reducing energy poverty by enabling access to clean energy through portfolio-supported solutions. Interventions include strategic investment in innovative technologies, deployment of renewable energy assets, and capacity-building activities. The logic assumes that without EIT InnoEnergy’s support, these solutions would not have scaled at the same pace or reached these markets.	**Contribution** – EIT InnoEnergy plausibly contributed to increased energy access in developing countries, but its share is small relative to the global deficit (666 million people without electricity in 2023).	**Moderate –** Internal monitoring and portfolio reporting confirm household connections, and results significantly exceed internal targets (by an order of magnitude).	**External factors:** National electrification programs, donor-funded initiatives, and co-investors also drive access outcomes, making full attribution impossible. **Data limitations:** No regional disaggregation; reliance on self-reported portfolio data; no validation of household size assumptions. **Attribution complexity:** Outcomes influenced by broader market trends and policy frameworks.

4.3.3.4 Resources leveraged for InnoEnergy sector's growth

External funds raised by supported assets (where InnoEnergy has a financial interest (equity of return on sales)). The value-added of the EIT InnoEnergy, as reported in the financial statements (in MEUR)

This KPI is directly linked to Strategic Objective 5: Growth, discussed above. It reflects EIT InnoEnergy's role in pooling resources for sector growth, so that the value created within its innovation ecosystem is translated into broader financial and market impact. The mechanism aligns with EIT InnoEnergy's business model, in which it acquires a discounted equity position or negotiates a return on sales in exchange for value-added services to innovative companies. Proceeds from successful exits are then reinvested in new innovations, creating a self-sustaining cycle of growth.[415]

Since 2010, all investments undertaken by EIT InnoEnergy have been governed by a Return on Investment (ROI) agreement signed with the beneficiary. These agreements link EIT InnoEnergy's financial engagement to successful outcomes, based on innovations that generate a measurable impact in at least one of three energy-related KPIs: reducing energy cost, decreasing GHG emissions, or increasing the operability of the energy system. These, in turn, are expected to deliver broader socioeconomic benefits, including job creation or maintenance, economic growth, and strengthened European competitiveness.[416]

From a financial perspective, EIT InnoEnergy acts as a risk investor, applying a risk-sharing and success-sharing model. ROI agreements are activated only when supported innovations succeed, making the approach transparent and mutually beneficial for ecosystem partners. This model has been widely accepted by stakeholders and has demonstrated its effectiveness in mobilising significant external resources.[417]

In addition, EIT InnoEnergy manages 12 different sources of revenue and resources that sustain its operations and investments, with 9 examples included in the Strategic Agenda:[418]

- Ecosystem fees & new shareholders: a net contributor to EIT InnoEnergy's financial sustainability. Under the GPA, partners make annual cash contributions, now structured as a commercial "Membership Benefit Programme" linked to ecosystem value.
- Partner co-funding: not a direct financial contributor but leverages EIT grants through partner resources– either own (cash or in-kind: staff, labs, infrastructure) or third-party (regional, national, EU funding).
- EIT Grant: a key net contributor, vital for current and future operations. Its share of the budget has declined since 2017, but it has remained fully implemented through annual Grant Agreements since 2010.
- ROI from innovation Projects: a net contributor via revenue sharing (1–5% of product sale price). Projects must return 5x the investment if successful, with multipliers adjusted for risk (see above).
- Equity monetisation (Highway): a net contributor. EIT InnoEnergy acquires 5–30% equity in start-ups for services. Exits have validated term sheets, with ROI expected to grow as ventures mature.
- Master School participation fees: a gross contributor. High-quality programmes allow for tuition fees (EUR 18,000 from the 2021 intake).

[415] EIT InnoEnergy Strategic Agenda 2021-2027, p. 4.
[416] Ibid., p. 28.
[417] Ibid.
[418] Ibid., p. 28-34.

- Consulting services: a marginal gross contributor. Supports Thought Leadership through assignments (e.g., Gates Ventures, Breakthrough Energy), innovation reports, and co-design of the R&D&I roadmap.
- Market Creator: a contributor via the Build-Operate-Transfer model. EIT InnoEnergy creates markets by initiating transactions, then transfers them to industrial partners at pre-agreed valuations.
- EU contracts: a marginal gross contributor. Strategic contracts with EU bodies provide additional revenue and align with EIT InnoEnergy's long-term strategy.

The following Table 100 provides an overview of the impacts achieved for KPI External funds raised by supported assets (where EIT InnoEnergy has a financial interest (equity of return on sales). The value-added of the InnoEnergy KIC, as reported in the financial statements (in million EUR).

Table 100. External funds raised by supported assets (where EIT InnoEnergy has a financial interest (equity of return on sales). The value-added of the EIT InnoEnergy KIC, as reported in the financial statements (in M EUR)

Impact indicators	Targets	Impacts achieved
External funds raised by supported assets (where EIT InnoEnergy has a financial interest (equity of return on sales) The value-added of the EIT InnoEnergy KIC, as reported in the financial statements (in M EUR)	8 000 by 2025 12 800 by 2027 100 million by 2025 250 million by 2027	EIT InnoEnergy measures the cumulative amount of funding attracted by its portfolio ventures. The figure reflects the total funding secured since the inception of InnoEnergy's activities. As of the latest update in 2022, the accumulated funding has already met and exceeded the targets set for 2025 and 2027. **By 2022**[419] EUR 9,7 billion To identify trends in the amount of funding attracted, two core KPIs can be tracked from 2017 to 2024: EITHE06 – Investment attracted by KIC-supported start-ups and scale-ups[420] and EITHE11 – FS revenues: Total financing generated annually by the KIC Legal Entity. Altogether, cumulatively, those values come to EUR 9 528 299 674,54 of investment attracted and EUR 194 469 015,4 in FS revenues.[421]

KPI	2017	2018	2019	2020	2021	2022	2023	2024[422]
EITHE06	32 000,000,00	20 065 986,00	1 394 867 275,00	631 511 736	679 845 788,73	455 228 888,81	2 387 500 000,00	3 927 280 000,00
EITHE11	4 932 738,41	11 026 600	18 724 000	23 828 000	34 781 000	33 636 677	41 100 000	26 440 000

[419] EIT InnoEnergy Impact Report 2024, TFS request (internal material).
[420] [EITHE06.1] Investment attracted by KIC-supported start-ups and scale-ups Total EUR amount of private and public capital attracted within year N by supported start-ups / scale-ups (per country) that have received KIC business creation services support or HEI CBI project support of total duration of at least two months, within a maximum of three years following the last received KIC KAVA incl. project support activity; EIT Impact Framework 2022-2027.
[421] The cumulative values come to 9 722 768 689,95, which is in line with the reported value by the end 2022 which may be coincidental.
[422] EIT Internal monitoring data (core KPI).

Case study: ROSI Solar[423]

Initiative highlights

ROSI is a startup company supported on several occasions with InnoEnergy.

ROSI Solar is a French startup founded in 2017. The company operates in France, in the Auvergne-Rhône-Alpes region. It is engaged in the rapidly emerging industry of circular-economy photovoltaics, with a mission to recover and reintegrate high-purity, critical raw materials, particularly silicon, into strategic industrial value chains.

Since its start, ROSI has been led by Dr Yun Luo, a woman engineer and entrepreneur with a PhD and postdoctoral experience in nanotechnology and material science. She leads a team of engineers and scientists focused on sustainable solutions for recycling raw materials.

In 2019, ROSI joined the EIT InnoEnergy initiative through its first financing instrument for technology development, based in Grenoble. InnoEnergy became the company's first investor and provided support in several key areas, including fundraising, company structure, industrial upscaling, and access to domain-specific experts.

The initiative's most significant outcome was the confirmation from ROSI's industrial partners that recycled raw materials could be utilised in their specific industrial value chains. This validation had a significant impact on the PV and raw materials sectors. The company is moving forward and continues to develop new products and services. Right now, ROSI has already started developing its recycling plant, and therefore, selling potential by offering innovative solutions for recycling and valorising raw materials in the solar photovoltaic industry.

Context and rationale

ROSI was created in response to the growing societal and industrial need to rescue high-purity raw materials and reinject them into strategic value chains. The initiative addresses the challenge of material waste in the photovoltaic (PV) sector and the lack of sustainable recycling solutions for high-value materials such as silicon. Silicon metal, although not officially listed as a critical raw material by the European Commission, is indeed considered strategically important, particularly for the PV and electrometallurgical industries.

Europe's internal production of silicon metal remains limited, estimated at below 10% of global output.[424] This makes the EU heavily dependent on imports, especially from China, which controls over 60% of the global supply and often undercuts European producers with significantly lower prices.[425] This dependency poses risks to Europe's industrial resilience and energy transition goals.

At the same time, the EU is projected to accumulate between 21 and 35 million tonnes of PV waste by 2050, containing valuable materials such as silicon, silver, and aluminium.[426] Efficient recycling of these components not only reduces reliance on external suppliers but also supports the EU's circular economy objectives and strengthens its strategic autonomy in clean energy technologies.

When it was founded, ROSI was at a very early stage, with proof-of-concept demonstrated only at the 10-gram scale. Funding was difficult to secure, and the company relied on French government support and private investment, including self-investment and backing from InnoEnergy. Although no formal needs assessment was conducted, the company's development was guided by practical challenges and market gaps. The initiative aligns with broader EU-level strategies, such as the European Green Deal, and national-level efforts to support the circular economy and clean technology innovation.

About the initiative

EIT InnoEnergy's role in the ROSI early-stage development was to provide support by identifying ROSI's needs, including assisting in the process of structuring the company. EIT InnoEnergy also led fundraising rounds and connected the company with experts and customers. This included facilitating access to large utility companies, which are essential for PV module recycling due to the scale of end-of-life modules from power plants. For

example, EIT InnoEnergy introduced ROSI to its joint venture partner in Spain, the country's largest electricity provider. In the words of the ROSI founder:

> *InnoEnergy is something quite special. I think, also, in Europe their vision is very strong and consistently pronounced, so it is more of a push towards that vision. This is very much lacking elsewhere, so it is quite unique for an investor.*
>
> *ROSI founder*

Concrete results of the initiative include:

- Validation of recycled materials by industrial partners.
- Formation of strategic partnerships.
- Expansion of ROSI's team and operations.
- Increased visibility and credibility through EIT branding.

Societal impacts

The initiative had a strong impact on ROSI's development and its broader ecosystem. It assisted them in growing from a small technical team into a scalable industrial operation. The support from EIT InnoEnergy helped ROSI clarify its market positioning and long-term vision, which now includes serving as a model for high-quality circular-economy practices.

The initiative, by extension, also impacted other actors, such as industrial partners, by easing access to the validated recycled materials and strengthening supply chain relationships. ROSI's work contributes to the development of standards for the reuse of low-carbon, high-purity strategic materials.

The founder of ROSI stated clearly that these changes would not have occurred without the support of the KIC and InnoEnergy, which provided complex support for the startups. The KIC's role went beyond typical investor or incubator support; it provided strategic vision, market development assistance, and long-term partnership.

Looking ahead, ROSI aims to establish high-purity raw materials as a market standard for strategic industries, providing an efficient way to introduce low-emission materials to the market.

[423] The case study is built on the EIT InnoEnergy inputs, including the insights from the ROSI CEO, which was interviewed by the KIC (including the questions tailored specifically for the purpose of this case study).
[424] Crm Alliance. Silicon-metal. https://www.crmalliance.eu/silicon-metal
[425] SILICON METAL. https://scrreen.eu/wp-content/uploads/2023/01/SILICON-METAL_CRM_2020_Factsheets_critical_Final.pdf
[426] European Commission. (2024). PV on rooftops and beyond can surpass targets while preserving the environment. https://joint-research-centre.ec.europa.eu/jrc-news-and-updates/pv-rooftops-and-beyond-can-surpass-targets-while-preserving-environment-2024-02-14_en

Impact attribution

The indicator “Resources leveraged for InnoEnergy sector’s growth” measures EIT InnoEnergy’s ability to mobilise external capital for its portfolio ventures and generate financial returns through equity positions and ROI agreements. This is central to Strategic Objective 5: Growth, ensuring that innovation translates into financial and market impact.

By 2022, EIT InnoEnergy-supported ventures had attracted EUR 9, billion in cumulative external funding, on track to meet the 2027 target of EUR 12,8 billion, and generated EUR 194 million in financial sustainability revenues, approaching the 2027 target of EUR 250 million. These results indicate a strong leverage effect relative to InnoEnergy’s own funding base.

In 2025, global energy investment is projected to reach USD 3,3 trillion, a 2% increase from 2024, with USD 2,2 trillion directed toward clean energy technologies, twice the USD 1,1 trillion allocated to fossil fuels. The share of clean energy in total investment has grown steadily over the past five years, driven by industrial policy, energy security, and climate goals. EIT InnoEnergy’s trend of rapidly increasing leveraged resources-, particularly after 2019, mirrors this global upward trajectory.

While its EUR 9,7 billion represents only a fraction of global flows, the alignment of its growth pattern with global clean energy investment trends reinforces that EIT InnoEnergy’s interventions are not isolated but part of the same structural shift toward decarbonization. This suggests that InnoEnergy is effectively leveraging these global dynamics to amplify its impact.

Although the magnitude of leveraged resources cannot be fully attributed to EIT InnoEnergy (given the influence of co-investors, EU and national programmes, and market dynamics), the evidence supports a plausible contribution claim. EIT InnoEnergy’s early-stage involvement, credibility signalling, and structured ROI model likely accelerated funding flows and improved venture survival prospects. Its leverage ratio, approximately 50 times its own annual operating budget, indicates a material enabling role in mobilising resources for the energy transition. However, attribution remains shared across multiple actors and policies.

Table 101. Impact attribution “External funds raised by supported assets (where EIT InnoEnergy has a financial interest (equity of return on sales)”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
External funds raised by supported assets (where EIT InnoEnergy has a financial interest (equity of return on sales). The value-added of the InnoEnergy KIC, as reported in the financial statements (in MEUR)	These indicators capture EIT InnoEnergy’s role in mobilising external capital for portfolio ventures and generating financial returns through ROI agreements and equity positions. The logic assumes that EIT InnoEnergy’s early-stage investment, ecosystem support, and credibility signals reduce risk for co-investors, catalysing additional funding.	**Contribution** – EIT InnoEnergy plays a catalytic role in attracting external investment, but the investment leveraged cannot be fully attributed to its intervention, as later-stage rounds involve multiple actors and market dynamics.	**Moderate –** Figures are based on audited financial statements and portfolio reporting, ensuring accuracy of aggregated amounts.	**External factors:** Market liquidity, EU and national funding programs, and investor appetite strongly influence capital flows. **Data limitations:** There is no breakdown of leverage ratios by stage or sector, and there is no independent validation of the attribution. **Attribution complexity:** Large rounds in mature ventures dominate the totals, and the early-stage catalytic effect is assumed rather than quantified.

4.4 EIT Health

EIT Health's vision is to enable people in Europe to "live longer, healthier lives by building and growing businesses to create products and services that progress healthcare in Europe, while strengthening our economy and the sustainability of our healthcare systems".[427] EIT Health's mission is to be Europe's leading innovation platform by 2030, facilitating longer, healthier lives and more sustainable healthcare systems.

The strategic goals of EIT Health, which have remained unchanged for the 2021–2027 period, are structured around three core objectives:

- **Better Health**: The first is to promote better health for all citizens by engaging European individuals and patients, raising awareness, disseminating knowledge, and developing tools, treatments, and solutions that support healthy living and active ageing. This objective aims to directly enhance the quality of life for 4,8 million Europeans by 2027.
- **Sustainable Health Systems**: The second goal focuses on strengthening healthcare systems in Europe by addressing barriers to innovation and fostering cross-border collaboration to build a more resilient and dynamic healthcare infrastructure. A key target under this objective is to educate 30 000 change agents capable of scaling sustainable and systemic solutions.
- **Competitive Health Economy:** The third strategic goal is to contribute to a sustainable health economy in Europe by cultivating an environment conducive to innovation, supporting the growth of health enterprises, and bringing new products and services to market. This, in turn, is expected to generate employment and reinforce a sustainable European economy, with a target of attracting EUR 1,3 billion in investment to start-ups by 2027.

Within those three objectives, the goal is also for funded activities to address health challenges in a co-creative and collaborative manner, with strong inclusion of European regions. The aim is to mitigate the fragmentation of the health market, resulting in at least 15% of the impact attributable to RIS regions. Lastly, the individuals driving EIT Health activities should reflect the diversity of society, with them outperforming the broader (health) industry in terms of gender balance and inclusivity.[428]

The Strategic Agenda acknowledges these strategic objectives and links them to broader societal and economic impacts, the UN SDGs, and proposed measures of Societal Impact. It also distinguishes between societal impact measures and impact KPIs. For societal impacts, the KPIs are consistent between the Strategic Agenda and the EIT Impact Framework. However, for economic impacts, the KPIs differ.

It is important to note that the connection between specific activities and their intended impacts is not presented in a straightforward manner within the Strategic Agenda. Furthermore, the proposed measures of Societal Impact are not equivalent to the impact KPIs, and data related to these measures is generally not collected or monitored. The table in Annex 3 summarises these elements.

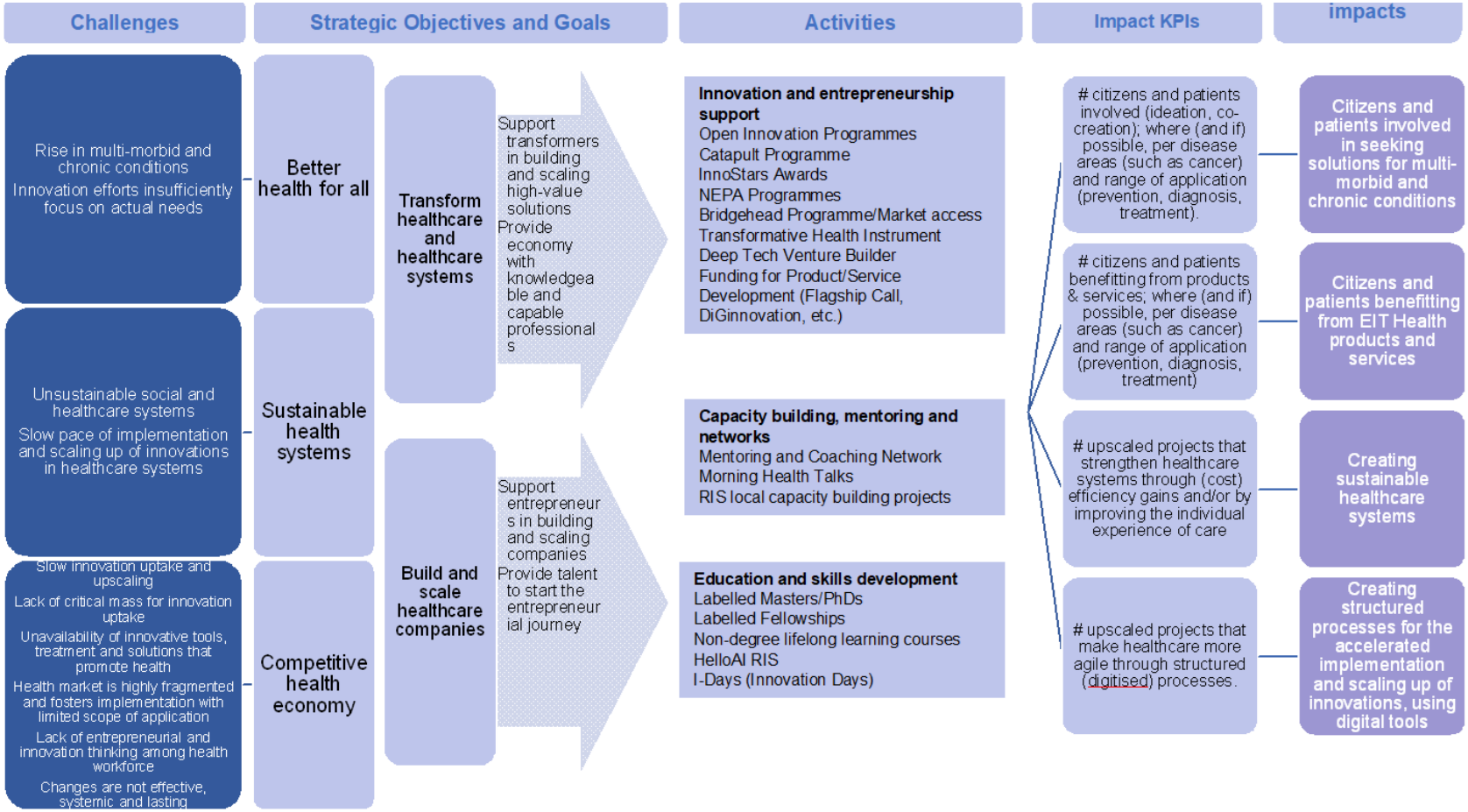
[427] EIT Health Strategic Agenda 2021-2027.
[428] Ibid.

4.4.1 Impact pathway

The following Figure 54 presents a simplified overview of EIT Health's impact pathway, from its overarching goals to inputs and Societal Impact KPIs. It is an amalgamation of the Strategic Agenda 2021–2027 goals and objectives, the Impact Framework KPIs, and insights gathered during the workshop conducted with the KIC. As such, it reflects the impact pathway as understood for the purpose of this study.[429]

[429] At the same time, the Societal Impacts under EIT Health's goals and objectives are broader and encompass additional KPIs, as pointed out in the section above. These results are discussed in the section below. However, for the scope of this study, the impact pathway for societal impacts may be interpreted as presented.

Figure 54. EIT Health – impact pathway



4.4.2 Overview of the main achievements

Key achievements[430]

- ✓ **2 285 ventures supported which attracted EUR 1,993 billion in investments.**
- ✓ **1 373 direct jobs and additional 13 500 indirect jobs created.**
- ✓ **125 innovations launched on market.**
- ✓ **708 graduates completed EIT-labelled programmes; over 64 000 participants in non-degree programmes by 2024.**
- ✓ **45 upscaled innovation projects.**
- ✓ **62 213 citizens involved in EIT Health activities.**

EIT Health, established in 2015, is a leading European Knowledge and Innovation Community dedicated to promoting entrepreneurship and innovation in healthy living and active ageing. Its mission is to enable healthier lives, strengthen healthcare systems, and contribute to a sustainable health economy in Europe by integrating education, research, and business.

EIT Health has achieved significant results in supporting start-ups, fostering innovation, creating jobs, and engaging citizens and patients. Its education and training programmes have upskilled tens of thousands, while its innovation support has brought impactful solutions to market and strengthened healthcare systems across Europe. The organisation has demonstrated significant financial leverage, regional inclusion, and international reach, positioning itself as a key driver of health innovation and sustainability in Europe.

Its innovation and entrepreneurship achievements include:

- Supporting start-ups and scale-ups, backing over 2 285 ventures between 2017 and 2024, far exceeding its target. These companies attracted EUR 1,993 billion in investment, almost triple the target set for the period.
- Creating 1 373 jobs in new businesses and supporting the creation of 13 500 jobs since 2017. Employment growth in supported SMEs rose from 1600 employees in 2018 to 15 700 in 2023, with 79,8% employment growth reported after support ended.
- Between 2016 and 2024, 125 innovations were launched on the market (against a target of 175), EIT Health's support was crucial for high-potential innovations, particularly in certification and validation, addressing critical gaps in the European healthcare market.
- Over 20% of private investments went to companies in EIT RIS countries, helping close the innovation gap between regions.

[430] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025; The overview of the core KPIs is provided in the Annex 4.

708 graduates completed EIT-labelled programmes between 2017 and 2024, of which 436 are Master's or PhD graduates. Performance among RIS country nationals was notable, with 55% of graduates coming from these regions.

EIT Health's non-labelled education and training programmes exceeded expectations, reaching 64 613 participants from 2021 to 2024. This was more than triple the initial Strategic Agenda target of 14 000.

Among supported start-ups and scale-ups, 86% reported that EIT Health was instrumental in addressing skill gaps, particularly in areas such as innovation, IT, and creativity. About 70% of EIT-labelled graduates have secured employment, with 30% joining start-ups.

EIT Health involved 62 213 citizens in its activities from 2016 to 2023, surpassing the 2024 target. Over 393 000 citizens and patients benefited from EIT Health-supported products and solutions (2018-2020), and more than 522 000 benefited in 2021–2023 alone.

EIT Health exceeded its targets for upscaled innovation projects, with 48 identified in the 2022-2023 period (targets: 12 for 2024, 21 for 2027). The projects contributed to system-level efficiency and digital transformation, and have directly addressed chronic diseases, cancer, neurodegenerative and cardiovascular conditions, and pandemic response, supporting both prevention and treatment innovations.

EIT Health expanded its active partner network to all EU Member States (except Malta) and six Horizon Europe associated countries, with strong SME participation and a focus on RIS countries.

EIT Health achieved a **lifecycle leverage factor of 6,15**, meaning that for every EUR 1 of EIT funding disbursed, its activities have helped attract over EUR 6 in **external investment**, when including co-investments (e.g. from start-ups) and non-EIT-funded activities.[431]

In contrast to a previously stated financial sustainability coefficient of 18,3%, the **latest evaluation reports a much lower figure**, which underscores ongoing reliance on EIT funding: according to the SWD(2025) 110, EIT Health's own revenues in 2021–2022 correspond to a **financial sustainability coefficient of ~ 10,5%.** The **leverage factor of 6,15** comes from the *Annex 24: Evaluation of EIT Health* in the Commission's SWD (2025) 110. The report states that when including co-investments by start-ups (EUR 1 784 million), the ratio of external investment to EIT grant reaches 6,15. The **financial sustainability coefficient** ("own revenues / EIT grant") is reported in the same Annex. The previously quoted 18,3% is incorrect or outdated; the Annex shows a lower percentage.[432]

Revenue streams continue to diversify, driven by expanding income from services and advisory activities, growing returns from equity holdings and portfolio exits, increased uptake of alternative public and private funding, and more stable membership-based revenues such as fees and annual partner contributions. In terms of partnership creation and impact, EIT Health's partnerships are balanced across education, research, and business, with over 370 active partners in 2023-2025 and a strong focus on SME support (18% of grants to SMEs in 2023-2025). The KIC is active in global outreach, with hubs in Silicon Valley, Tel Aviv, and London, and supports the internationalisation of European health innovation

There are synergies created with other initiatives: EIT Health works closely with the EIC, EIF, and other EIT KICs, strengthening Europe's health innovation landscape through joint and cross-sectoral.

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[431] European Commission. (2025). Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). https://eur-lex.europa.eu/resource.html?format=PDF&uri=cellar%3Aebc71839-25bf-11f0-829d-01aa75ed71a1.0001.02%2FDOC_16&utm_source=chatgpt.com
[432] European Commission. (2025). Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024).https://www.eu.dk/samling/20251/kommissionsforslag/kom%282025%290189/forslag/2134060/3012094.pdf?utm_source=chatgpt.com

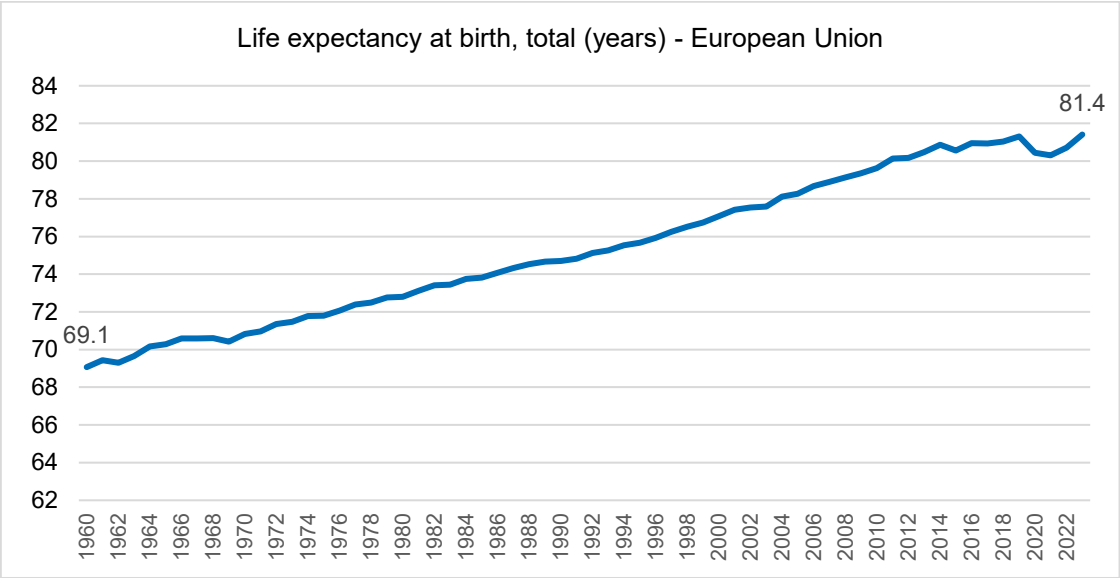
In response to the COVID-19 pandemic, EIT Health acted swiftly, supporting 36 innovative solutions and launching a rapid-response programme with a budget of EUR 7 million.

4.4.3 Selection of societal impacts

In its Strategic Agenda, EIT Health frames the rise in multi-morbid and chronic conditions as one of the most pressing challenges facing European healthcare. As they point out, over the past 150 years, average life expectancy has increased by approximately four to five years per generation. This development stands as a remarkable achievement. Yet, the additional years of life are not necessarily matched by additional years of good health.

Indeed, life expectancy at birth in EU countries has shown a consistent upward trend, increasing from 69 years in 1960 to an estimated 81 years in 2023 as presented in Figure 55.

Figure 55. Life expectancy at birth in the EU 1960-2023



Source: Ecorys, based on WHO[433]

As EIT health diagnosees in its Strategic Agenda, this longevity shift has contributed to an ageing population increasingly affected by multiple chronic conditions, including cancer. EIT Health further points out that the healthcare and social systems continue to face structural rigidity, with limited capacity to adapt swiftly to changing demands. The financial pressures associated with care provision are increasing, driven by rising service-delivery costs and the integration of emerging technologies, including digital solutions and artificial intelligence.

EIT Health highlights a widening gap between the supply of and demand for healthcare services and investment. In the Strategic Agenda, they state that current evidence suggests that as many as one in three patients is not offered the care they require. The causes of this shortfall include the underuse of proven interventions, significant and unwarranted variation in the implementation and outcomes of care, inefficient application of resources, and the overuse of certain medical interventions. According to EIT Health, addressing these systemic inefficiencies is essential for healthcare systems to sustainably meet the demands of a growing, ageing population while maintaining quality and equity of care.

[433] World Bank. https://data.worldbank.org/indicator/SP.DYN.LE00.IN?end=2023&locations=EU&start=1960&view=chart.

4.4.3.1 Citizens and patients involved in seeking solutions for multi-morbid and chronic conditions

citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)

Some of the key functions in innovation in medicine for chronic and multi-morbid conditions are personalisation of care through digital tools and data integration, integrated, continuous care models for patients with multiple chronic conditions, digital health, such as remote monitoring, AI-supported diagnostics, mobile health apps and social and process innovations such as models of care co-created with patients and communities.[434] Through these functions, innovation enables more coordinated care pathways, improved quality of life through self-management tools, better outcome tracking via digital monitoring, and prevention of worsening of the condition through early alerts (e.g., digital apps).[435]

Co-creation, on the other hand, involves engaging patients, caregivers, and citizens in the design, testing, and refinement of healthcare solutions. Patients provide insight into daily challenges, unmet needs, and care priorities. This approach makes innovations usable, accepted, and effective in real-life contexts. It also helps tailor solutions across the entire care continuum,- from prevention to treatment and long-term self-management. Co-created solutions are more likely to be sustained, trusted, and used.[436]

The number of citizens and patients involved can be found in programmes and projects financed by the EU, e.g., EUPATI,[437] which focuses on medicines research and development and has trained more than 2 000 patient experts. Furthermore, EIT Health Living Labs[438] users co-create health innovations in real-life environments with thousands of patients involved.

Patient involvement in the case of cancer is very high and can be found in prevention (awareness, screening tools), diagnosis (symptom apps, AI imaging), and treatment (decision aids, survivorship planning). One of the examples is EUPATI Oncology. In general, in the case of multi-morbidity, where the number of patients involved is growing, personalised care pathways, integration tools, and digital triage apps are often piloted in living labs with older or poly-morbid populations.

Innovation and co-creation in medicine are more patient-driven than ever, especially critical in multi-morbid and chronic conditions. Co-creation ensures solutions are fit for real-life complexities, especially for long-term or multiple conditions. Furthermore, tens of thousands of citizens and patients are involved each year globally in ideation and co-creation, with higher involvement in cancer, mental health, and rare diseases.

One of the key ways EIT Health seeks to tackle these challenges is by prioritising patient and citizen involvement in the design and delivery of healthcare innovations. Patient and citizen involvement has been a central element of EIT Health's strategy, ensuring that healthcare innovations are not only technically sound but also meaningful, acceptable, and impactful for end users.

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[434] E.g. Ambrosi, E., Mezzalira, E., Canzan, F., Leardini, C., Vita, G., Marini, G., & Longhini, J. (2025). Effectiveness of digital health interventions for chronic conditions management in European primary care settings: Systematic review and meta-analysis. International Journal of Medical Informatics, 105820; van Kessel, R., Roman-Urrestarazu, A., Anderson, M., Kyriopoulos, I., Field, S., Monti, G., .. & Mossialos, E. (2023). Mapping factors that affect the uptake of digital therapeutics within health systems: scoping review. Journal of Medical Internet Research, 25, e48000; Sousa, M. J., Nunes, F. G., do Nascimento, G., & Chakraborty, C. (Eds.). (2023). Future health scenarios: AI and digital technologies in global healthcare systems. CRC Press.
[435] Ibid.
[436] EIT Health, https://eithealth.eu/open-innovation-programme-co-creator-hub/, https://eithealth.eu/what-we-do/external- collaborations/, EIT. (2021). EIT Health announced the RIS Innovation Call results. https://www.eit.europa.eu/news-events/news/eit-health-announced-ris-innovation-call-results.
[437] https://eupati.eu/.
[438] EIT Health. (2020). EIT Health Living Labs and Test Beds Programme. https://eithealth.eu/news-article/eit-health-living-labs-and-test-beds-programme/.

In the healthcare domain, engaging patients and citizens in the co-design and co-creation of solutions is particularly critical,[439] as it helps innovations respond to real needs, reflect lived experiences, and ultimately achieve stronger societal outcomes. This approach is closely aligned with the citizen science dimension of Open Science, positioning patients and citizens not only as end-users but as co-designers and co-creators.[440]

The Business Plan 2020 introduced a more structured approach to Citizen and Patient Engagement (CPE), with the appointment of a dedicated Citizen and Patient Engagement Manager and the development of an X-Pillar CPE Strategy accompanied by guidance resources.[441] Subsequent Business Plans (2021–2022, 2023-2025) reinforced this commitment, explicitly stating that EIT Health innovations should have a tangible impact on people in Europe and on healthcare systems, with patients and citizens involved throughout the innovation process.

2021-2022 Business Plan requirements (e.g. BP 2022 Calls) made CPE a condition for innovation projects, further institutionalising the practice. In parallel, EIT Health committed to pursuing partnerships with European civil society organisations, such as the European Patients Forum and the BioMed Alliance, to strengthen representation and advocacy in the innovation process.[442]

The Business Plan 2023–2025 further centres CPE at the centre of EIT Health's approach to healthcare innovation. The partnership model (150 organisations from academia, business, research, and healthcare delivery) aims to provide a strong institutional foundation, while EIT Health actively promotes the involvement of citizens and patients as co-designers and co-creators of solutions. In practice, this engagement is to be implemented through various mechanisms.

Citizens and patients, along with their representative civil society organisations (e.g. the European Patients Forum and the BioMed Alliance), are expected to play an active role in shaping innovation projects at different stages of the cycle, going beyond the general provisions of the previous Business Plan. Their perspectives and lived experiences are anticipated to inform the design of activities (co-design), the innovation process (co-creation), and the dissemination and adoption of results. This involvement supports the development of healthcare solutions "with" or "by" the people they are meant to serve, rather than "to" or "for" them.

Examples of such activities include patient and citizen representation in project consortia or advisory groups, participation in surveys, and engagement in focus groups or public forums. Importantly, EIT Health distinguishes between genuine involvement in co-creation processes and more traditional roles as research subjects (e.g., clinical trials or usability studies), with only the former considered as meaningful citizen and patient engagement (both are presented in the table below).

Based on the Business Plans, the involvement of citizens and patients is presented as an increasingly important component of the overall strategy. The approach is described in greater detail, outlining its significance and the means by which it is to be achieved. However, the concept of Societal Impact, as understood in these documents, remains broad, with a wide range of activities intended to contribute to its realisation (as such, establishing the impact pathway is not straightforward).

The following Table 102 provides an overview of the impacts achieved for KPI # citizens and patients involved (ideation, co-creation), where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment).

[439] Workshop with the EIT Health.
[440] EIT Health Business Plan 2021-2022.
[441] EIT Health 7-year assessment.
[442] EIT Health Business Plan 2021-2022.

Table 102. # citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)

Impact indicators	Targets	Impacts achieved
# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)	25 600 (reached through partnership) by 2024 38 400 (reached through partnership) by 2027	Generally, this KPI includes involvement in innovation projects, educational initiatives, and clinical trials.[443] Consequently, data can be captured both at a general level, reflecting overall engagement across activities, and at a more specific level, depending on the indicators selected by individual projects. The KPI KIC11 is understood as a means of tracking patient and citizen participation across EIT Health activities. Individual projects select specific custom KPIs to report on, depending on their focus and scope. As a result, some projects apply the KPI narrowly (e.g. tracking involvement in ideation or co-creation within a specific disease area), while others adopt a broader approach. Supporting evidence defines the KIC11 KPI as the number of individual citizens and/or patients involved in EIT Health-supported programmes. Stages of innovation where this KPI can be reported on include Identification and prioritisation, Ideation/Creation, Design and planning, and Development. A citizen is defined as a person participating as a member of the public without a pre-existing health condition. A patient is defined as a person participating due to a pre-existing health condition and who is receiving or registered to receive medical treatment for that condition. Involvement refers to individuals sharing their views and experiences, which are then used to guide and inform programme design (co-design) and implementation (co-creation), as well as related processes. In line with the aforementioned Business Plan, participation as subjects of research or innovation conducted 'to', 'about', or 'for' them, such as clinical trials or usability studies, does not qualify as involvement under KIC11 KPI, as it has a dedicated KPI discussed below. Examples of qualifying involvement (non-exhaustive) include: membership of advisory groups or boards, participation in focus groups and discussion forums, and responses to surveys. The reported value for this KPI alone surpasses both the targets established for 2024 (more than double the target) and the 2027. **KIC11 (up to 2024)[444]** 62 213

[443] Workshop with the EIT Health.
[444] All the values included in this section are coming from the internal monitoring data of the EIT Health.

The data collected under the KPI KIC11 can be further aggregated and disaggregated to provide more detailed insights. In addition to the overall numbers, it is possible to analyse how many citizens/patients were reached as per:

- Pillars under which the involvement took place (e.g. Innovation, Education) and the type of initiative.
- Name of the activity (project, programme, or initiative).
- Country where citizens and patients were engaged.
- Specific activity and what it entailed (e.g. co-design workshops, focus groups, clinical trials, educational programmes).
- Range of application (treatment, diagnosis etc.)
- Disease area addressed (e.g. cancer, cardiovascular disease).
- Resulting innovation, product, or service, where applicable, that benefited from this involvement.

The activities under this KPI span a broad range of involvement. Those involved (non-exhaustively):

- Co-creation workshops, design sprints, living labs, stress-testing of training, and requirements gathering.
- Interviews, focus groups, customer discovery, patient journey mapping, usability testing, prototype testing, advisory boards.
- Participation in pilots, clinical scanning/testing, and validation modules with end-users.
- Public screening invitations, knowledge/attitude surveys, user experience surveys, clinician questionnaires.
- Courses, seminars, webinars, multi-directional learning events, value-based healthcare education, patient-led sessions.
- Conferences, Researchers' Night, awareness events, local/online outreach, media visibility, school activities.
- Website traffic/unique visitors, social media reach, participant portals, online content.
- Ideation sessions, problem/solution validation, business design, persona canvases, needs observation.
- Expert panels, keynotes, invited talks, industry mentors, company spokespersons, insurer interviews, health technology assessment/digital health module development.

The activities presented a wide range of initiatives aligned with the covered pillars. Frequently mentioned examples included Innovation Days in selected cities, Be RIGHT with breast cancer risk management (BRIGHT), the EIT MedTech Bootcamp, the EIT Labelled PhD Programme in Biomedical Engineering and Health Systems, Personalised Prevention and Very Early Treatment of Rheumatoid Arthritis, Cross-KIC Child Obesity, and the Patient Innovation Bootcamp. This demonstrates, in line with the definition of this KPI, that very different projects across diverse areas can report under this indicator

Understandably, the greatest involvement was observed in cases where the method itself was designed to gather extensive feedback. Accordingly, activities such as surveys, website traffic (e.g., number of visits), or employee engagement prior to launch contributed significantly to higher participation levels.

The activities were most frequently deployed in Spain, Ireland, Portugal, Italy, and Estonia. However, in terms of reach, the highest was recorded in the Netherlands (14 092 individuals), primarily due to the exceptionally high participation in the survey for the project Personalised prevention and very early treatment of rheumatoid arthritis, which was conducted there.

In the analysis of disease areas, the category labelled "Other" was the most frequently mentioned, appearing in over 100 instances. This was followed by Oncology, which was referenced in approximately 40 activities, and then by Musculoskeletal, Rheumatology & Osteology, Mental Health, and Infectious Diseases.

While frequency highlights the breadth of engagement, the depth of involvement is better reflected in the reported values. Oncology emerged as the most impactful in terms of patient involvement, with a combined reported value of around 16 600, driven by several large-scale projects. Musculoskeletal, Rheumatology & Osteology followed closely, although this figure was largely influenced by a single outlier project.

Sleeping Disorders also showed significant engagement, reaching a total of about 7 000 people engaged, primarily due to one highly successful initiative that contributed the majority of that value.

Pillars (KIC11)	
Business creation	131
Cross-KIC Scheme	362
Education	15 599
Innovation	44 484
Range of application (KIC11)	
Diagnosis	20 841
Treatment	3 117
Prevention	36 618
Type of initiative (KIC11)	
Business created	2 571
Co-creation	8 855
Ideation	250
Involvement of civil society stakeholders	3 178

Separately, the other KPI measures the involvement of patients in clinical trials – KIC21.

Under KIC21, only the Innovation pillar was included, with 18 activities reporting on the corresponding KPI. These activities showcased a diverse and inventive range of solutions aimed at improving patient care and healthcare delivery. Among the innovations were an open-source handheld ultrasound probe that integrates smartphone access to imaging, a gamified virtual reality solution designed to reduce procedural distress in children, and a co-created robotic exoskeleton to aid mobility in individuals with spinal cord injuries. Other developments also included custom footwear tailored for diabetic neuropathy.

The highest levels of participation were observed for several solutions, including the companion app for Parkinson’s disease patients; the development of a novel needle tract sealant system to prevent

pneumothorax during lung biopsy; and a device to open the blood–brain barrier (BBB) in first-line Temozolomide treatment for Glioblastoma patients. These solutions are either very close to the patients or require a high level of engagement, particularly in the field of medical technologies.

These clinical trials were conducted almost exclusively in Western European countries, such as France, Germany, Belgium, and Spain.

KIC21 (up to 2024)[445]
661

[445] All the values included in this section are coming from the internal monitoring data of the EIT Health.

- **Impact highlight**

ABLE Human Motion is transforming mobility and independence for people living with spinal cord injury (SCI) through the development of lightweight, affordable robotic exoskeletons. Designed in close collaboration with patients, these wearable devices enable users to stand, walk, and regain freedom of movement, addressing a profound unmet need in healthcare. EIT Health has supported ABLE Human Motion from its earliest stages, providing vital funding, business support, and access to a network.

Alfons Carnicero, Co-founder and CEO of ABLE Human Motion, believes that the only way to develop an exoskeleton that effectively addresses this unmet need is through direct collaboration with individuals living with SCI.

Through EIT Health, ABLE Human Motion was connected with expert clinicians with extensive experience supporting individuals with paraplegia. This backing - both financial and through connections - enabled the Barcelona-based start-up to co-create directly with people living with SCI, so that every new feature of the exoskeleton is tested and validated by end-users. With EIT Health's support, the company has advanced its development and built a strong consortium of partners. Thanks to this, ABLE Human Motion has successfully raised private funding to advance the development of its exoskeleton, an achievement that would have been difficult to realise without such assistance.

The innovation has the potential to significantly improve the quality of life for people living with SCI: an estimated 930 000 new cases occur globally each year. Current solutions are often heavy, expensive, and difficult to use. By focusing on co-creation, ABLE Human Motion has developed a device that is lighter, easier to operate, and more affordable, while future versions aim to extend functionality to climbing stairs and ramps.

In 2015, Iván was diagnosed with a SCI following the removal of a tumour from his spine. The injury resulted in a loss of mobility, leaving him reliant on a wheelchair. This led to significant changes in his life: he had to leave his job, relocate, and was no longer able to play football with his son. Iván became involved with ABLE Human Motion during the development of their exoskeleton. He actively participated in the co-creation and testing process and became deeply engaged with the project. Today, he continues to collaborate with ABLE Human Motion and its partners to further develop and clinically validate the exoskeleton in both hospital rehabilitation and home care settings.

The societal and economic impact is substantial. Enabling individuals with SCI to walk again can reduce the risk of secondary complications, alleviate depression and anxiety (which affect one-third of SCI patients), and improve employability, addressing unemployment rates that exceed 60% globally.

Looking ahead, ABLE Human Motion aims to expand its technology to serve people with other mobility impairments and neurological conditions, extending its potential to empower millions more worldwide.[446]

Impact attribution

The indicator "# citizens and patients involved (ideation, co-creation)" tracks the extent to which EIT Health engages citizens and patients in shaping health innovations. This KPI is directly linked to the objective of fostering

[446] EIT Health. ABLE Human Motion: Revolutionising rehabilitation for independent living. https://eithealth.eu/spotlight-story/able-human-motion/; Able Human Motion. Exoesqueleto ABLE Rehabilitación robótica accesible para todas las clínicas. https://www.ablehumanmotion.com/.

patient-centric solutions for multi-morbid and chronic conditions, ensuring that innovation processes reflect real-world needs and experiences.

By 2024, EIT Health reported 62 213 citizens and patients involved, more than double the 2024 target of 25 600 and far exceeding the 2027 target of 38 400. This level of engagement demonstrates a significant commitment to participatory approaches across the innovation lifecycle, from ideation and design to validation and implementation.

The KPI encompasses a wide range of activities, including co-creation workshops, design sprints, advisory boards, surveys, and educational programmes, as well as involvement in innovation projects and clinical validation. Importantly, participation is not limited to passive roles; it includes active contributions to ideation and co-design, which are critical for developing solutions that address complex health challenges, such as cancer, musculoskeletal disorders, mental health issues, and chronic conditions like rheumatoid arthritis.

As shown in Table 102 above, the distribution of disease areas reflects a strong emphasis on early intervention and proactive health management, which are essential for reducing the burden of chronic disease. However, while the reported figures indicate substantial engagement, attribution to the overarching objective requires careful interpretation. The KPI captures breadth of involvement, but not necessarily depth or sustained impact on innovation outcomes. Furthermore, the diversity of activities (from surveys to intensive co-design workshops) means that the quality and influence of participation vary significantly. Nonetheless, the scale of engagement, combined with evidence of involvement in high-impact projects (e.g., BRIGHT for breast cancer risk management, rheumatoid arthritis prevention initiatives), supports a contribution claim.

Table 103. Impact attribution "# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)	This indicator captures EIT Health's role in engaging citizens and patients in the design and development of health innovations. The logic assumes that structured involvement in ideation, co-creation, and planning stages increases the relevance, usability, and adoption of solutions for chronic and multi-morbid conditions. EIT Health aims to embed patient and citizen perspectives into innovation processes by creating opportunities for participation through workshops, advisory boards, surveys, and educational programmes.	**Contribution** – EIT Health plausibly contributed to greater patient and citizen involvement in health innovation compared to a scenario without such structured engagement. However, the extent to which this involvement directly influenced innovation outcomes cannot be fully established.	**Moderate –** Based on internal reports compiled from project-level data submitted by EIT Health partners through the KIC11 monitoring framework. However, the data rely on self-reported figures from partners and do not include a systematic assessment of the depth or quality of engagement.	**External factors** such as national patient advocacy initiatives, EU-level engagement requirements (e.g., Horizon Europe), and digital health trends also drive participation, making full attribution difficult. **Data limitations:** inconsistent definitions of "involvement" across projects, reliance on self-reported figures, and a lack of linkage between outcomes and innovation success. **Attribution complexity:** Activities vary widely in intensity–from passive survey responses to active co-design–yet all are counted equally under the KPI.

4.4.3.2 Structured processes created for the accelerated implementation and scaling up of innovations, using digital tools

upscaled projects that make healthcare more agile through structured (digitised) processes

Digital transformation holds considerable promise for improving the efficiency of health systems. Digital tools help healthcare improve faster by making approvals quicker, allowing solutions to be used widely, and making systems work together. They also let doctors track patients in real time and help respond quickly to new needs, such as during COVID-19 or with mental health apps.[447]

Studies show that digital tools can reduce the administrative burden on healthcare professionals by as much as 30%.[448] In general, digital innovation is seen as a key tool to boost European healthcare: the Polish Council Presidency prioritised health system digitalisation, while the 2025 Competitiveness Compass confirmed that the EU's AI strategy will target improvements in public services, including healthcare.[449] The Danish Council Presidency further prioritise boosting research, innovation, and competitiveness, strengthening healthcare resilience to crises, and advancing the European Commission's action plan on hospital and healthcare cybersecurity.[450]

The development of eHealth and the digital transformation of healthcare have been long-standing priorities for the EU. During the 2014–2020 and 2021–2027 programming periods, various EU funding instruments supported digital health initiatives. Notably, the Cohesion Policy allocated EUR 2,4 billion, and the RRF earmarked EUR 13,6 billion to support digitalisation projects in national healthcare systems. To facilitate access to these resources, the European Commission also provided Member States with targeted guidance on how to leverage the available EU programmes.[451]

Digitalisation enables the systematic and repeatable deployment of innovations by embedding them into digitally supported workflows. This structured approach addresses two challenges:

- Slow implementation of new solutions (often due to a lack of standard pathways) and fragmented scaling across regions and health systems. In the case of innovation cycle management, platforms manage idea intake, prototyping, testing, evaluation, and scaling (e.g., innovation hubs). Real-time dashboards for performance monitoring and iterative improvement help in monitoring and give feedback loops, while telemedicine, cloud services, and digital therapeutics allow rapid national and global scaling.[452]

- Fast adaptation to new evidence, rapid integration of new tools, and scalable responses to patient needs are making healthcare more agile through digitised processes.

According to the EIT Health Strategic Agenda, this KPI directly addresses the societal challenge of the "slow pace of implementation and scaling up of innovations in healthcare systems" in Europe. Healthcare systems are often

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[447] https://www.mobihealthnews.com/news/emea/new-eit-health-funding-fast-tracks-covid-19-innovation-projects, https://eithealth.eu/news-article/eit-health-empowering-innovators-from-ideas-to-impact/, https://www.eit.europa.eu/news-events/news/eit-digital-supports-8-european-health-scale-ups.
[448] OECD & European Commission. (2024). Health at a Glance: Europe 2024 – State of Health in the EU Cycle. OECD Publishing. https://www.oecd.org/en/publications/health-at-a-glance-europe-2024_b3704e14-en.html.
[449] Amand-Eeckhout, L. (2025). Healthcare in the EU: Addressing urgent labour shortages and ensuring quality jobs. European Parliamentary Research Service (EPRS), European Parliament. https://www.europarl.europa.eu/thinktank/en/document/EPRS_ATA%282025%29767231.
[450] Council of the European Union. (2025). The Programme of the Danish Presidency of the Council of the European Union 2025. https://danish-presidency.consilium.europa.eu/en/programme-for-the-danish-eu-presidency/programme-of-the-danish-eu-presidency/.
[451] European Court of Auditors, Digitalisation of healthcare. EU support for member states effective overall, but difficulties in using EU funds, European Union, 2024.
[452] EIT Health Strategic Agenda 2021-2027, https://eithealth.eu/view/five-steps-to-futureproofing-europes-health-innovation-pathway-in-the-digital-age/, https://eithealth.eu/open-innovation-programme-co-creator-hub/ https://eithealth.eu/news-article/think-tank-releases-report-on-expediting-innovation-pathway/.

described as entrenched, slow to adapt, and facing difficulties in embracing digitalisation and artificial intelligence, which contributes to rising costs.

EIT Health aims to overcome these barriers to improve healthcare delivery and enable life-changing solutions, thereby contributing to more resilient and dynamic healthcare systems across Europe.[453]

Beyond responding to immediate challenges, such as COVID-19, which highlighted the existing issues and gaps in these areas, digitalisation is embedded in EIT Health's core strategic objectives for 2021–2027. It is positioned as a key driver of sustainable healthcare transformation, fostering innovation in prevention, diagnosis, treatment, and system efficiency. Through digital tools and platforms, EIT Health aims to maximise the societal impact of its activities, empower patients and citizens, and contribute to the long-term sustainability of healthcare systems across Europe.[454]

The overarching goal is to facilitate the "accelerated implementation and scaling up of innovations, using digital tools," leading to more sustainable healthcare systems. This includes increasing efficiency, reducing avoidable expenditures, and improving access to high-quality care by enhancing healthcare's agility through the adoption of digital solutions.

EIT Health's approach to digitalisation is multi-faceted and systemic, reflecting the complexity of the identified challenges it seeks to address. Rather than relying on a single activity, EIT Health embeds digitalisation across its portfolio, with strategic direction provided by two dedicated Flagship initiatives, which address digital transformation at scale.

- **Facilitating the uptake of digital medical devices and diagnostics**

The KIC supports Europe's digital health transformation by focusing on the development, deployment, and accessibility of digital medical devices (DMDs).[455] Its objectives include improving prescription and reimbursement pathways for certified digital medical devices across EU Member States and harmonising clinical trial protocols to ensure replicability and consistency of medical outcomes. The Flagship aims to accelerate access, foster trust, and enable faster reimbursement for digital health innovations.

- **Harnessing the full potential of health data for innovation**

The KIC underpins the implementation of the European Health Data Space (EHDS)[456], unlocking the secondary use of health data to drive innovation. It supports the development of new technologies and solutions that deliver meaningful outcomes for patients, while also fostering training and capacity-building for patients, citizens, and healthcare professionals.[457]

While these are overarching flagship initiatives, they provide strategic direction and outline the priorities of EIT Health for supporting the overall digitalisation of healthcare. This translates into support delivered closer to the ground, namely, to ventures that offer such solutions. Several actions address this priority:

- **Bridgehead** programme connects health entrepreneurs seeking to scale their business in Europe with leading incubators and accelerators from EIT Health's network, known as Catalysers. Participating

[453] EIT Health Strategic Agenda 2021-2027.
[454] Ibid.
[455] Broadly understood as software, hardware, or combined digital tools used for patient diagnosis, monitoring, treatment, and prevention of illness.
[456] The European Health Data Space (EHDS) is a major EU initiative aimed at transforming how health data is accessed, shared, and reused across Europe. The EHDS Regulation establishes a unified framework for the exchange and use of electronic health data across the EU. It empowers individuals to access, control, and share their health data across borders for healthcare (primary use), while enabling secure reuse of data for research, innovation, policy, and regulation (secondary use). It also supports a single market for electronic health record systems. The Regulation was published on 5 March 2025 and enters into force on 26 March 2025, initiating the transition phase; https://health.ec.europa.eu/ehealth-digital-health-and-care/european-health-data-space-regulation-ehds_en
[457] EIT Health Business Plan 2023-2025.

companies are matched with suitable partners based on their target markets and needs. Together, they develop strategies to enter new markets efficiently, gain access to local networks, infrastructure, and clients, and navigate regulatory environments.[458]

- **DiGinnovation** programme supports digital health micro and small enterprises in navigating reimbursement pathways and accelerating the adoption of their solutions by healthcare professionals and patients. The programme is open to companies with CE-marked digital health devices and provides tailored support through international consortia formed with EIT Health partners and beyond. Selected enterprises benefit from expert guidance, pitching opportunities, and access to funding to expedite market entry, strengthen reimbursement readiness, and promote the wider uptake of digital medical devices across Europe.[459]
- **MedTech Bootcamp** (one of several Bootcamps offered) is a programme for graduate students, healthcare professionals, engineers, and computer scientists with a startup concept in medical technology, including digital health solutions. It provides support in transforming early-stage ideas in medical technology and digital health into validated business concepts. Participants gain entrepreneurial training, business planning support, and access to a network of investors and experts to help bring their innovations closer to the European market.[460]
- **Catapult** is a pan-European competition and training programme designed to fast-track the most promising life sciences and health tech start-ups. The programme combines intensive entrepreneurial training with exposure to leading experts, investors, and industry representatives. Participants develop their business models, refine their pitches, and strengthen negotiation skills, while competing for cash and in-kind prizes at high-profile European events. Finalists also benefit from pan-European visibility, networking opportunities, and the chance to join the EIT Health community of leading innovators.[461]

The following Table 104 provides an overview of the impacts achieved for KPI # upscaled projects that make healthcare more agile through structured (digitised) processes.

[458] EIT. (2023). EIT Health Bridgehead: Take your healthcare business abroad. https://www.eit.europa.eu/our-activities/opportunities/eit-health-bridgehead-take-your-healthcare-business-abroad; EIT Health. Grow Your Business. https://eithealth.eu/what-we-do/our-programmes/grow-your-business/ .
[459] EIT Health. DiGinnovation: Supporting digital health micro and small enterprises on their way to reimbursement. https://eithealth.eu/programmes/diginnovation/; EIT. (2023). DiGinnovation: Supporting digital health start-ups on their way to reimbursement.https://www.eit.europa.eu/our-activities/opportunities/diginnovation-supporting-digital-health-start-ups-their-way.
[460] EIT Health. MedTech Bootcamp.https://eithealth.eu/programmes/medtech-bootcamp/; https://ciitt.umed.pl/projects/medtech-bootcamp/ .
[461] EIT. (2023). EIT Health Catapult: fast-tracking Europe's best start-ups. https://www.eit.europa.eu/our-activities/opportunities/eit-health-catapult-fast-tracking-europes-best-start-ups; https://eithealth.eu/programmes/catapult/.

Table 104. # upscaled projects that make healthcare more agile through structured (digitised) processes

Impact indicators	Targets	Impacts achieved
# upscaled projects that make healthcare more agile through structured (digitised) processes.	45 by 2024 77 by 2027	For this indicator, the monitoring data is based on information provided in the final reports of relevant activities. These reports specifically addressed each project's contribution to enhancing agility in healthcare through the implementation of structured, digitised processes. It focuses on projects that launched products on the market between 2021 and 2024, which have since been finalised, no longer receive EIT funding, and are actively used by organisations, patients, and citizens. Additionally, the data includes start-ups supported during this period that have introduced market-ready products contributing to the digitisation and increased agility of healthcare services. The "upscaled projects" are projects where proof exists that they were developed with EIT Health support and are later used by organisations without further EIT Health support.[462] Overall, during the aforementioned time period (2021-2024), EIT Health achieved the exact target cumulative value by 2024.

2021	2022	2023	2024[463]	Additional[464]
7	11	7	7	13

Within these achievements, as expected, most projects were developed under the Innovation pillar. Examples include an integrated remote patient monitoring system to optimise care pathways and reduce face-to-face clinical time; the development of polygenic risk score technology into a fully EU regulation–compliant medical device with uptake supported by public payers and screening providers; AI-enabled rehabilitation and therapeutic exercise monitoring software; or patient-centred solutions for gathering structured longitudinal health data.[465]

Business creation	2
Cross-KIC Scheme	1
Education	3
Innovation	26

[462] EIT Health Strategic Agenda 2021-2027.
[463] Data reported by the activities in their final reports for the specific questions on their contribution to making healthcare more agile through structured (digitised) processes. The focus was on projects which launched products on the market between 2021-2024, which have been finalised and no longer receive EIT funding and are used by organisations, patients, citizens; EIT Health internal monitoring data.
[464] Start-ups supported that have launched products on the market that contribute to making healthcare more agile through structured (digitised) processes; EIT Health internal monitoring data.
[465] EIT Health internal monitoring data.

Start-ups supported	3
Start-ups supported through Bridgehead that accessed other markets, with revenues	10

The COVID-19 pandemic significantly accelerated the digitalisation of healthcare across Europe, emphasising its relevance for both societies and economies. Public interest in digital health solutions grew rapidly, and Member States adopted a range of digital tools to maintain healthcare delivery under restrictive conditions.[466]

Social distancing measures made eHealth solutions, such as telemedicine, digital prescriptions, and electronic invoicing, especially important, leading to widespread uptake. While in-person care remains the primary mode of treatment, eHealth services are increasingly used and are becoming an established complement to traditional care.

The pandemic also highlighted the need for stronger coordination and smoother cross-border flows of health data within the EU, prompting governments to step up their efforts in healthcare digitalisation.[467]

Historically, the EU policy framework for digital health relied mainly on “soft” instruments, such as recommendations and non-binding objectives, with progress dependent on member states' voluntary commitments. This has shifted in recent years. In 2022, all Member States committed to the targets outlined in the 2030 Digital Compass,[468] including the binding goal of ensuring that every European citizen has online access to their electronic health record by 2030.

Similarly, participation in the eHealth Digital Service Infrastructure (eHDSI, branded as MyHealth@EU)[469] is set to move from voluntary to mandatory under the proposed EHDS regulation.[470]

Member States are increasingly leveraging EU-level tools and financial support to drive healthcare digitalisation. Eighteen out of twenty-one states reported using one or more EU funds, most commonly the European Regional Development Fund (ERDF) and the Recovery and Resilience Facility (RRF), to invest in digital health. Likewise, 20 reported using EU instruments, such as technical standards, guidelines, and coordination or expert meetings, to guide and support their national efforts.[471]

In addition to EU and Member States initiatives, startups and mid-sized technology firms are actively developing innovative digital healthcare solutions. Global corporations are further driving this momentum.

[466] European Court of Auditors, Digitalisation of healthcare. EU support for member states effective overall, but difficulties in using EU funds, European Union, 2024.
[467] Ibid.
[468] European Commission. 2030 DIGITAL COMPASS: YOUR DIGITAL DECADE. https://futurium.ec.europa.eu/pl/digital-compass.
[469] European Commission. Electronic cross-border health services. https://health.ec.europa.eu/ehealth-digital-health-and-care/digital-health-and-care/electronic-cross-border-health-services_en.
[470] See above; European Court of Auditors, Digitalisation of healthcare. EU support for member states effective overall, but difficulties in using EU funds, European Union, 2024.
[471] Ibid.

Pharmaceutical companies, insurance providers, research institutions, and government agencies are also increasingly involved in digital healthcare initiatives. The convergence of these diverse stakeholders is significantly accelerating the digital transformation of the healthcare sector.[472]

The rapid pace and convergence of technological advancements have created a dynamic and continuously evolving digital healthcare landscape, marked by a constant flow of innovations and updates. In such an environment, providing a comprehensive snapshot of the sector's status and trends is inherently challenging. Nonetheless, the industry has maintained overall growth, even in the face of recent headwinds linked to global economic tightening.[473]

[472] Lee NK, Kim JS. Status and Trends of the Digital Healthcare Industry. Healthc Inform Res. 2024 Jul;30(3):172-183. doi: 10.4258/hir.2024.30.3.172. Epub 2024 Jul 31. PMID: 39160777; PMCID: PMC11333813.
[473] Ibid.

Case study: ProHeart

Initiative highlights

The project leader, ProCarement GmbH, is based in Germany and is part of the Medical Valley, a national medical innovation ecosystem in the Nuremberg Metropolitan Region.[474] The project started on 15 August 2022 and lasted for four months until December 31st.

The project aimed to tackle the lack of optimal medical therapy for heart failure patients, thus contributing to the creation of sustainable healthcare systems by improving the individual experience of care. ProHeart is a therapy companion for patients with heart failure: its application, ProHerz, collects data from personal monitoring hardware of a patient to collect their data, which then classifies the current state of health in a traffic light system.

This system is monitored by healthcare professionals. In this way, the ProHerz application is an innovative digital tool for implementing patient-centred hybrid care concepts: it improves patients' self-management and provides healthcare professionals with timely information about their patients' health status.

The application is the first and only cardiological digital health application (DiGA) in Germany.[475] The cost of this app is reimbursed by health insurance. As an innovative digital product which needed support in market entry, the project ProHertz was supported through DiGinnovation programme. The programme provided access to the network of its partners, as well as mentoring

The most important outcome is increased access to health services, as the digital product developed for the German market was prepared for the French market. After it was successfully implemented in clinical settings in Germany, the only digital assistant application of its kind for heart failure patients was introduced.

The ProHerz application was accepted by the German authority (Federal Institute for Drugs and Medical Devices – BfArM); this means that one innovative health-related application is introduced to the market, and its costs are covered by the health insurance. This increased access of heart failure patients to optimal medical care, improving their quality of life and mitigating risks for life-threatening complications, while at the same time decreasing the need for frequent specialist visits and hospitalisation.[476]

Context and rationale[477]

Heart failure is a severe chronic disease with a high number of patients: because of the steady rise in heart failure occurrence, hospital admissions have also risen, resulting in more than 2,5 million patients in Germany alone, and the prevalence and rise in number of patients are similar in the wider European population.

The increase in patient numbers is about 17% per year. Heart failure is a serious condition with a mortality 10-20% higher than some forms of cancer. The project recognises that management of this chronic disease can be improved without negative effects on patients' quality of life, because continuous virtual monitoring of their condition will reduce the number of avoidable specialist visits or hospitalisations, while providing timely warning of potential health deterioration.

This also means that virtual monitoring should decrease the public health burden of heart failure while providing a viable model that contributes to the creation of sustainable healthcare systems. It provides a cost-efficient method for monitoring health for heart failure patients while improving the individual experience of care.

The needs assessment conducted was informal, and was based on the existing recent research about the prevalence of heart failure in Germany, trends for heart failure occurrence in the population in general and about the management of chronic diseases in the population. This assessment noted that heart failure patients who do not receive optimal medical therapy might experience an impaired quality of life or even life-threatening complications.

A gap analysis of regulatory requirements based on the published documents by French public authorities was conducted. As a formal needs assessment, in the first half of 2022, a pilot study that evaluates ProHerz application was conducted. It lasted for three months and included 71 participants. The study "Supporting patients with heart failure with digital therapeutics" was a successful proof of concept for the ProHerz application.

The most relevant policy for this project is the French Social Security Financing Act (LFSS) from 2018. Also relevant is the German Act to Improve Healthcare Provision through Digitalisation and Innovation (Digital Healthcare Act–DVG) from 2019. The EU-level policy was based on Article 14 of the Cross-Border Healthcare Directive (2011/24/EU) and the European Pillar of Social Rights Action plan.

The EIT Health DiGinnovation programme provided a funding opportunity for ProCarement SME that was very well suited to their needs: enabling the upscaling of the existing digital solution in development and the capacity to make healthcare for HF patients more agile.

EIT Health support provided the professional network of partners with a deep understanding of the complex medical and IT topic that intersects with different health systems and their participants, which differ in size. EIT Health stands out as a complex and well-structured programme that effectively tailors its support to the specific needs of its partners. In this initiative, its primary contribution was to act as a moderator and guide.[478]

About the initiative

ProHerz is a therapy companion for patients with heart failure that supports their self-management and provides an early warning system informing them of changes in their health status. The vital signs measured daily by the patients (blood pressure, oxygen saturation, pulse, temperature, weight) are recorded and analysed automatically, either manually or via Bluetooth connection to mobile devices (smartphones, tablets). This makes it possible to independently document and monitor the health status of patients with this chronic disease. After entering the data, the patient immediately receives a quick assessment of the current health status. In addition, ProHerz offers digitally implemented and personalised health coaching and other functions for risk prevention based on the obtained data and the individual health and therapy profile. For patients, ProHerz is easy to use. Their doctors can see in real time how the heart problems of their patients are developing and can thus initiate adjustments in therapy (i.e. medication, recommendations concerning nutrition, possible follow-up examinations at any time). Making the ProHerz application available to both patients and their doctors required a proof-of-concept study, which was carried out with support from the DiGinnovation programme. This study showed that the concept is both feasible and has a positive impact on the health of patients who participated in the study. The study was conducted in Germany.[479]

The project itself was focused more on entering the French market and meeting the necessary, legally set conditions for it. It was necessary to prepare existing German solutions for the French market by translation of the application and the web portal into French, in preparation for the release of the ProHerz-App in France; to develop a branding concept; and to prepare market access of the application in France. To define a business strategy developed through interviews with 10 key opinion leaders in the industry, and prepare a CRM system.

To increase the adoption rate, it was planned to include healthcare professionals and patients in the further development of the application's solutions. These objectives would have ensured that the application is available

[474] Medical Valley. ProCarement GmbH. https://www.medical-valley-emn.de/en/partner/procarement-gmbh/.
[475] Chauhan, G. K., Vavken, P., & Jacob, C. (2025). Mobile apps and wearable devices for cardiovascular health: Narrative review. JMIR mHealth and uHealth, 13, e65782. https://mhealth.jmir.org/2025/1/e65782.
[476] Final Activity Performance Report, internal material for the activity "220816 ProHeart – Virtual heart center as-a-service" that was submitted to EIT Health.
[477] EIT Health. ProHeart. https://eithealth.eu/product-service/proheart/.
[478] Interview with beneficiary.
[479] Reif, S., Schubert, S., Stiefel, J., & others. (2022). Supporting patients with heart failure with digital therapeutics-–A pilot study in Germany. Digital Health, 8. https://doi.org/10.1177/20552076221143899.

to French heart failure patients with reimbursement, as it is now for German heart failure patients. They align well with the identified needs and challenges in the French healthcare market.

All of these preparations for the French market would have been much harder and more time-consuming if EIT Health hadn't been helping by mentoring and providing access to its extensive network of partners. These partners helped the project contact relevant medical and legal professionals in France.[480]

ProCarement GmbH, the owner of the ProHerz application and the project lead, worked with Digital Pharma Lab and Sanofi as project partners. Digital Pharma Lab led activities necessary for entering the French DiGA clearance process. Sanofi led activities in product marketing, healthcare professional and patient engagement, and healthcare professional training.

The basis for this initiative was a business plan for the placement of a digital medical product, and the following concrete results were achieved:

- Within a year of completion of the project, the ProHerz application was approved in the German DiGA, and patients who use it are reimbursed for its cost. In May 2023, ProHerz was certified as the first cardiological DiGA in Germany and can now be prescribed as a statutory health insurance benefit. ProCarement still plans to enter the French market and it will enrol the first patient in another European country in October 2025 (within three years after completion of the project). This achievement builds on objectives successfully achieved and preparations implemented in the ProHeart project. Support provided by the DiGinnovation programme has clear mid-term positive effects in this case.
- According to available data[481], German patients downloaded the application more than 20 000 times. The application is regularly updated.
- Through project activities, 200 patients/citizens were given information about EIT Health and/or activities it supported.
- Use of the application was successfully studied in a clinical setting in Germany as a part of the solution development life cycle.

One unforeseen negative outcome was that due to delays in approving relevant legislation, the ProHerz application could not be submitted for approval on the French healthcare market – there was no legal basis to do so. This meant that the real-life test of the application in the French market was delayed, as well as entering the French DiGa process for reimbursement. On the other hand, an unforeseen positive outcome is that the application is of interest to researchers as one of the applications for monitoring cardiovascular patients and as the only application specifically designed to monitor HF patients.[482]

Societal impacts

The study "CARNA – Evaluation study to assess medical benefits and positive care effects of app-based, guideline-compliant patient support in heart failure".[483] The study started in March 2022 and ended in December 2024. Its target sample size was 450 patients. The study showed the application's effectiveness, and, according to publicly available information, about 20 000 patients are using it. Further studies showing the application's economic effects are planned.[484]

[480] Interview with beneficiary.
[481] Data from ProHerz application page in application stores, internal material.
[482] For example, Covering digital health applications in the public insurance system: how to foster innovation in patient care while mitigating financial risks - evidence from Germany at https://www.frontiersin.org/journals/digital-health/articles/10.3389/fdgth.2023.1217479/full.
[483] Federal Institute for Drugs and Medical Devices. (2025). CARNA - Evaluation study to assess medical benefits and positive care effects of app-based, guideline-compliant patient support in heart failure . https://drks.de/search/en/trial/DRKS00027949.
[484] EIT Health. ProHeart. Therapy companion for patients with heart failure. https://eithealth.eu/product-service/proheart/.

Other studies interested in digital monitoring of cardiovascular health use ProHerz application and its results, especially since it is the only application available with insurance coverage and has a very specific target group of patients with heart failure.

All partners involved in the project expanded their professional networks, and ProCarement GmbH gained knowledge and expertise on the application process for national DiGa systems and can now provide other partners within their network with help in that area.[485]

In this project, partners provided ProCarement GmbH with the knowledge, increased visibility, and expanded network necessary for participation in the French healthcare market. All project partners extended their professional networks with professionals who have a deep understanding of complex medical and legal topics.

The ProHeart project showed that it is possible to create a health monitoring application that has clear benefits for targeted patients, and these benefits are significant enough to provide health insurance coverage for its costs. Proving this was possible with financing from DiGinnovation. ProHerz application helps in the creation of more agile healthcare that is able to provide medical intervention when needed, while ensuring that patients are better informed and more active in managing their condition.

The biggest help provided by EIT Health was connecting the project lead with reliable partners who were well-suited to their needs and streamlining communication. Creating invaluable and long-lasting professional and business connections with the help of EIT Health is a big long-term benefit for future products and the development of ProCarement.

The case study in Section 4.7.3.2 also highlights EIT Health's supporting role in advancing the Women in Tech initiative, showcasing its contributions to promoting gender balance and empowering women in innovation and entrepreneurship.

Impact attribution

The indicator "# upscaled projects that make healthcare more agile through structured (digitised) processes" provides a direct measure of EIT Health's contribution to advancing digital transformation in healthcare. It counts the number of projects that have successfully scaled beyond pilot stages and are actively used by organisations, patients, and citizens, thereby introducing structured, digitised processes that improve system agility.

Between 2021 and 2024, EIT Health achieved the cumulative target for this KPI, reporting 45 upscaled projects, which meet the 2024 goal and set a strong trajectory toward the 2027 target of 77. The data underpinning this KPI is based on two sources: (1) final reports of EIT Health innovation projects that launched products on the market between 2021 and 2024, which have been finalised and no longer receive EIT funding, and (2) records of start-ups supported through Bridgehead Europe and Bridgehead Global that introduced products in new markets. Only solutions with proven market uptake and real-world application are counted as "upscaled," ensuring that the indicator reflects tangible outcomes rather than early-stage prototypes.

This KPI is a direct indicator, as it measures actual upscaling rather than proxy activities. However, its scope is limited, as it does not assess the depth of adoption, sustainability over time, or the systemic impact on healthcare agility. The definition of "upscaling" also varies across projects, and the indicator does not capture whether digitisation led to measurable improvements in efficiency or patient outcomes. Despite these limitations, the evidence supports that EIT Health has played a catalytic role in enabling the market uptake of digital health solutions, aligning with EU-level objectives for healthcare digital transformation under the 2030 Digital Compass and the European Health Data Space.

[485] Interview with beneficiary.

Table 105. Impact attribution "# upscaled projects that make healthcare more agile through structured (digitised) processes"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Number of upscaled projects that make healthcare more agile through structured (digitised) processes	This indicator measures the number of EIT Health-supported projects that have successfully scaled and are actively used by organisations, patients, or citizens. The logic is that these projects would not have reached this stage without EIT Health's funding, mentoring, and network support, which are designed to accelerate market entry and adoption.	**Direct attribution** – **input indicator** (EIT Health's interventions directly enabled these projects to upscale and launch on the market).	**High –** Based on internal reports compiled from two main data sources: (1) Final reports of EIT Health innovation projects that launched products on the market between 2021 and 2024 and are no longer receiving EIT funding. (2) Records of start-ups supported through Bridgehead programmes that successfully entered new markets. Attribution is triangulated with qualitative evidence from case studies such as ProHeart, which demonstrate EIT Health's role in enabling cross-border scaling of digital health solutions.	**Scope limitations:** The indicator measures the number of upscaled projects but does not capture the depth of adoption, sustainability over time, or systemic impact on healthcare agility. In addition, definitions of "upscaling" vary across projects. **External factors** such as national digital health strategies, regulatory frameworks, and co-funding from other sources.

4.5 EIT RawMaterials

EIT RawMaterials positions itself as a European actor supporting the transition towards a sustainable economy. Its main mandate is to contribute to securing the supply of critical and strategically important raw materials for European industry by fostering innovation across the raw materials value chain. In doing so, it seeks to help maintain and strengthen Europe's industrial competitiveness while supporting job creation.

The KIC's long-term objective is to develop raw and advanced materials into a strategic advantage for Europe. This includes promoting the cost-efficient, sustainable, and innovative use of raw materials from reliable, traceable sources, supported by skilled professionals, entrepreneurs, and education systems.

EIT RawMaterials' vision emphasises circularity and sustainability. It seeks to improve the performance of existing material cycles and design new ones that maximise the value of resources, encourage investment, and draw on the innovation capacity of start-ups, SMEs, and larger industries. EIT RawMaterials seeks to enhance the competitiveness and attractiveness of the raw materials sector by integrating technological innovation, entrepreneurship, and talent development, while also increasing public awareness of Europe's dependency on raw materials.[486]

EIT RawMaterials pursues three interrelated strategic objectives:

- **Securing raw materials supply**. To secure a sustainable and reliable supply of raw materials for European industry, reduce dependence on non-European sources, and strengthen Europe's strategic autonomy. This includes the ambition to expand extraction and processing capacity within Europe, identify resources through advanced exploration technologies, and support start-ups, SMEs, and junior mining companies in commercialising innovations. The KIC plans to contribute to new mine development and increased exploration spending by facilitating investment, fostering partnerships, and promoting digital solutions such as sensors and remote operations. The objective also includes the importance of ethical and sustainable sourcing, traceability, and gaining social licence to operate, while equipping the sector with entrepreneurial and technical skills through education and lifelong learning.

- **Designing materials solutions**. The objective is to promote the future design and production of advanced material solutions that support sustainability and competitiveness across European industries. As up to 80% of a product's environmental impact is determined at the design stage, the objective prioritises a systemic, life-cycle approach that integrates raw material selection, product design, business models, and circularity principles. In parallel, the objective includes the importance of skills and talent development, aiming to build a pipeline of entrepreneurial and technical expertise through lifelong learning and higher education programmes.

- **Closing materials loops**. To accelerate the transition from a linear to a circular economy by closing material loops across the value chain. This objective focuses on treating end-of-life products as resources, minimising losses and unused stocks, and valorising secondary sources, particularly in RIS countries where recovery rates remain low. Planned activities include supporting innovation in material flow analysis, life-cycle assessment, and resource efficiency, with the goal of embedding circular design principles in at least 10% of European raw materials companies. Through future acceleration and upscaling efforts, the KIC aims to contribute to the EU's end-of-waste paradigm by increasing recycling rates, developing industrial symbiosis solutions, and promoting advanced recovery methods.

[486] EIT RawMaterials Strategic Agenda 2021-2027.

These objectives are designed to complement one another. Innovation is expected to emerge within each area and, through their interactions, encourage collaboration among disciplines and actors along the raw materials value chain.[487]

The impacts of EIT RawMaterials are also framed in its Strategic Agenda, which specifies expected outcomes by 2027, and corresponding impact targets, as presented in the table in Annex 3. These outcomes and targets provide the basis for the analysis presented in the following sections, with selected indicators highlighted in bold and referenced in detail later. While the Strategic Agenda incorporates Societal Impacts into its framework (combining Economic and Societal ones), the Impact section of the document primarily emphasises measurable results such as education outcomes, innovations reaching the market, the establishment of hubs, and the role of partnerships.

[487] Ibid.

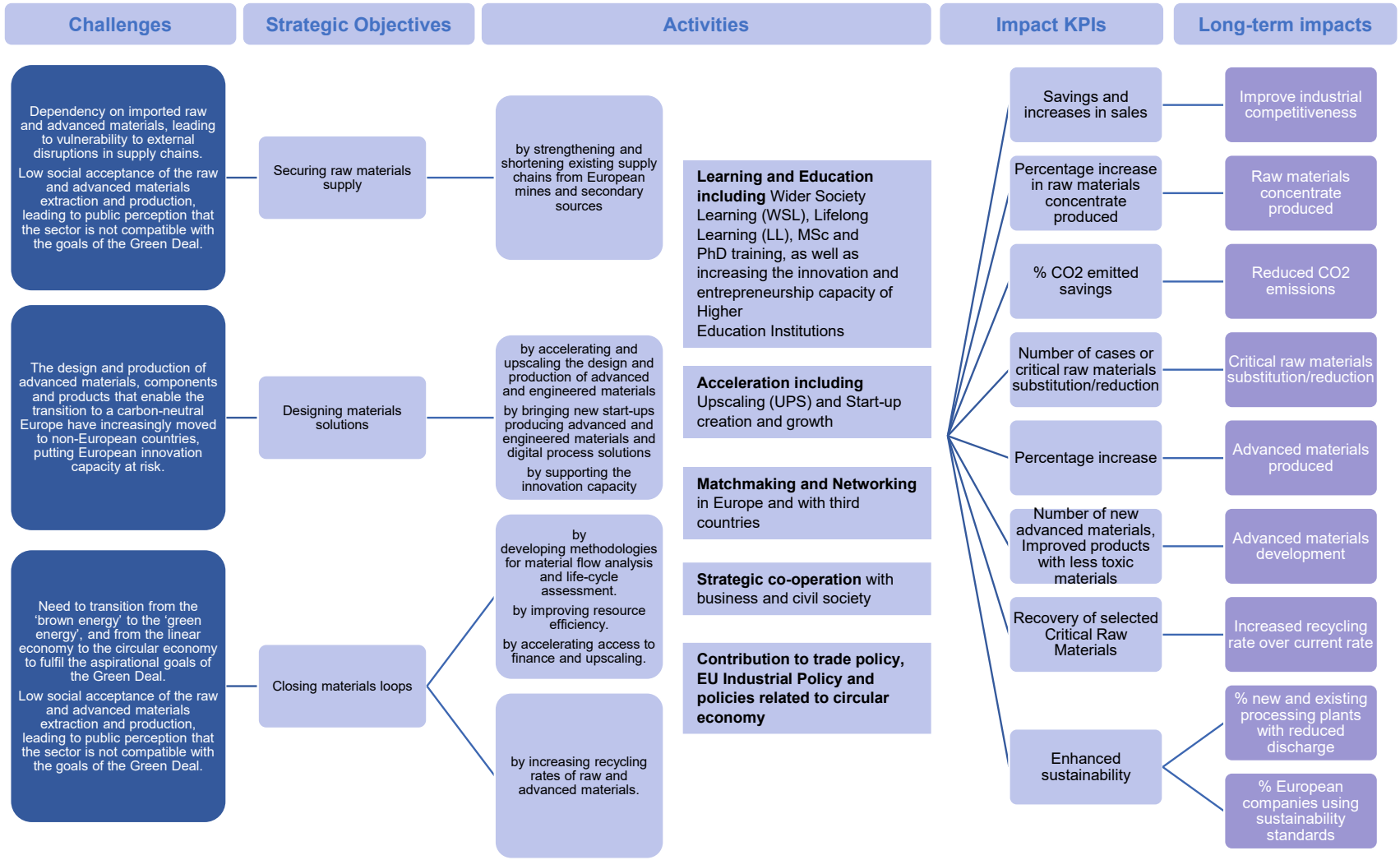
4.5.1 Impact pathway

The following diagram presents a simplified Theory of Change (impact pathway) based on the EIT RawMaterials Strategic Agenda 2021-2027. It links the main societal challenges to the KIC's strategic objectives, activities, and expected impacts by 2027.

EIT RawMaterials pursues three main strategic objectives: Securing raw materials supply, Designing materials solutions, and Closing materials loops. Together, these address Europe's critical need to ensure access to raw and advanced materials, reduce dependence on imports, substitute critical raw materials, and improve recycling rates in line with the EU Green Deal and Circular Economy Action Plan.

Activities include strengthening and shortening European supply chains from primary and secondary sources, accelerating the design and production of advanced materials, creating and supporting start-ups, scaling up pilot and demo plants, developing methodologies for material flow and life-cycle assessment, improving resource efficiency, and increasing access to finance.

Figure 56. EIT RawMaterials – impact pathway



4.5.2 Overview of the main achievements

Key achievements[488]

- ✓ **Supported over 750 start-ups and scale-ups, attracted investments totalling EUR 593 million.**
- ✓ **Introduced 373 innovations to the market.**
- ✓ **787 EIT-labelled graduates and more than 100 000 participants have engaged in non-labelled courses.**
- ✓ **36% of participants in the EIT-labelled Master programmes are women.**
- ✓ **Developed eight new advanced materials and has recorded 62 new or improved products with reduced toxic content.**
- ✓ **71 substitution cases for critical or toxic materials have been validated, contributing to increased recycling rates and supporting the EU's circular economy goals. Additionally, EIT RawMaterials projects have delivered multiple new or improved materials, contributing to sustainable production and resource efficiency.**
- ✓ **The ERMA and EIT RawMaterials partnership comprises over 1 100 members (800 + 300), forming a pan-European network of industry, research, and innovation actors.**
- ✓ **EIT RawMaterials initiatives have mobilised multi-billion EUR investments in innovation projects and ventures, demonstrating a high leverage effect of EIT funding.**
- ✓ **Supported thousands of jobs in the raw materials sector, contributing to employment in a context of a shrinking European job market.**
- ✓ **Approximately one-third of EU Strategic Projects in the raw materials sector have been promoted or enabled through EIT RawMaterials activities.**

EIT RawMaterials, established in 2015, is the largest innovation network within Europe's raw materials sector. It unites over 140 core and associate partners and more than 190 project partners in 30 countries. The KIC's mission is to secure a sustainable supply of critical raw materials for Europe, drive innovation, foster entrepreneurship, and develop essential skills for the ongoing green and digital transitions.

It has delivered substantial achievements in innovation, entrepreneurship, education, and investment attraction, directly supporting the EU's resilience in raw materials, green and digital transitions, and circular economy objectives. Its activities have generated significant economic, societal, and environmental impacts.

One of EIT RawMaterials' strategic objectives is to secure Europe's raw materials supply. They have been instrumental in supporting the EU's Critical RawMaterials Act (CRMA) and the objectives set by Horizon Europe.

[488] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025;

This includes efforts to strengthen and renew raw materials supply chains, reduce dependency on external sources, and support the transition toward a circular economy.

In designing material solutions, EIT RawMaterials has committed resources to projects aimed at substituting critical, toxic, and underperforming materials. This both reduces environmental impacts and enhances supply security. The KIC promotes the closure of material loops by advancing innovation and education initiatives focused on recycling and the development of new materials, thereby supporting a sustainable circular economy.

A significant aspect of the KIC operations is its emphasis on innovation and business creation. Between 2017 and 2024, the KIC supported over 750 start-ups and scale-ups. With a remarkable survival rate exceeding 80%, these entities have attracted investments totalling EUR 593 million.

The KIC has introduced 373 innovations to the market. Through its leadership of the European RawMaterials Alliance (ERMA), EIT RawMaterials is assessing over 100 investment projects, amounting to qualified investment opportunities exceeding EUR 25 billion, thereby fostering innovation and investment in the sector.

In 2025, EIT RawMaterials established both the European Raw Materials Academy and the European Advanced Materials Academy. These aim to address critical skill gaps and assist in meeting the European Union's pressing reskilling and upskilling needs. The Academies build on and expand EIT RawMaterials' education activities so far. These programmes have successfully enabled over 400 new EIT-labelled graduates to progress toward their 2021-2027 targets. More than 100 000 participants have engaged in non-labelled courses, significantly exceeding previous targets.[489] Gender balance has also been a focal point, with over 36% of participants in the EIT-labelled Master programmes being women, surpassing set benchmarks.

The societal and industrial impact of EIT RawMaterials is substantial. The organisation has developed eight new advanced materials, well beyond its target, and has recorded 62 new or improved products with reduced toxic content. 71 substitution cases for critical or toxic materials have been validated, contributing to increased recycling rates and supporting the EU's circular economy goals.

EIT RawMaterials has positively impacted job retention and indirect job creation within the sector, although further assessment of the sustainability of these jobs through innovation is needed. The KIC is expanding its partnership model, offering attractive funding and services to both new and existing partners, particularly in RIS countries. The goal is to transition EIT RawMaterials into a stand-alone and profitable service organisation by 2027.

4.5.3 Selection of societal impacts

4.5.3.1 Raw materials concentrate produced

Percentage increase in raw materials concentrate produced

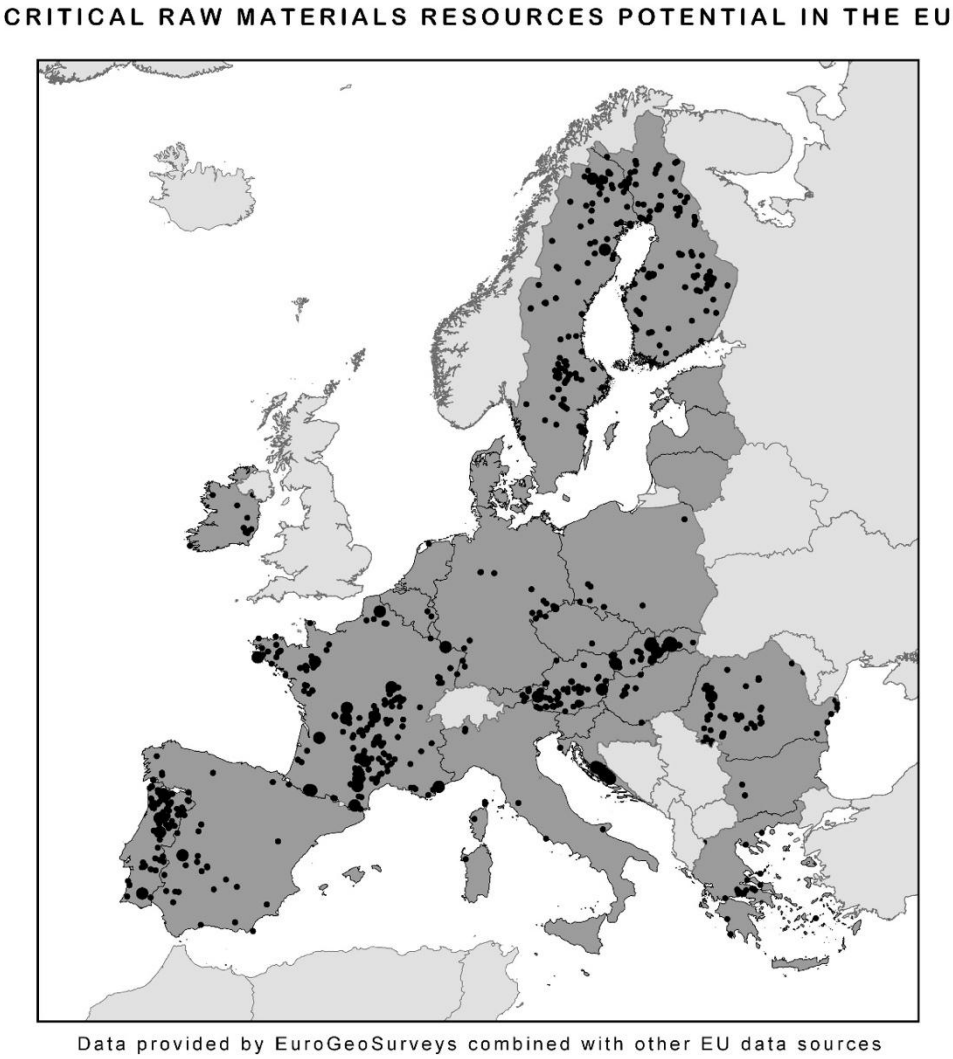
Data on the amounts of raw materials concentrate produced within the EU is limited, as the region remains heavily dependent on imports for many critical raw materials. According to Eurostat and the European Commission, domestic production is relatively small, with most activity focused on processing rather than extraction. The EU has launched strategic projects under the CRMA to boost internal production, but these are still in development.[490]

[489] Strategic Agenda target for participants in non-labelled education 2021-2024: 17 435
[490] Eurostat. International trade in critical raw materials. https://ec.europa.eu/eurostat/statistics-explained/index.php?oldid=617911.

According to information presented in the EU Communication "Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability" (COM(2020) 474 final), "enhancing the use of Europe's domestic resources is key to strengthening the EU's resilience and advancing its open strategic autonomy."

The document notes that Europe has a rich history of mining and extraction, with abundant deposits of aggregates, industrial minerals, and certain base metals such as copper and zinc. However, despite considerable potential, it has been less effective in developing projects for critical raw materials. Several factors contribute to this challenge, including limited investment in exploration and mining, complex and varied national permitting processes, and low public support.[491] Figure 57 maps the CRM deposits across the EU:

Figure 57. CRM resources potential in the EU

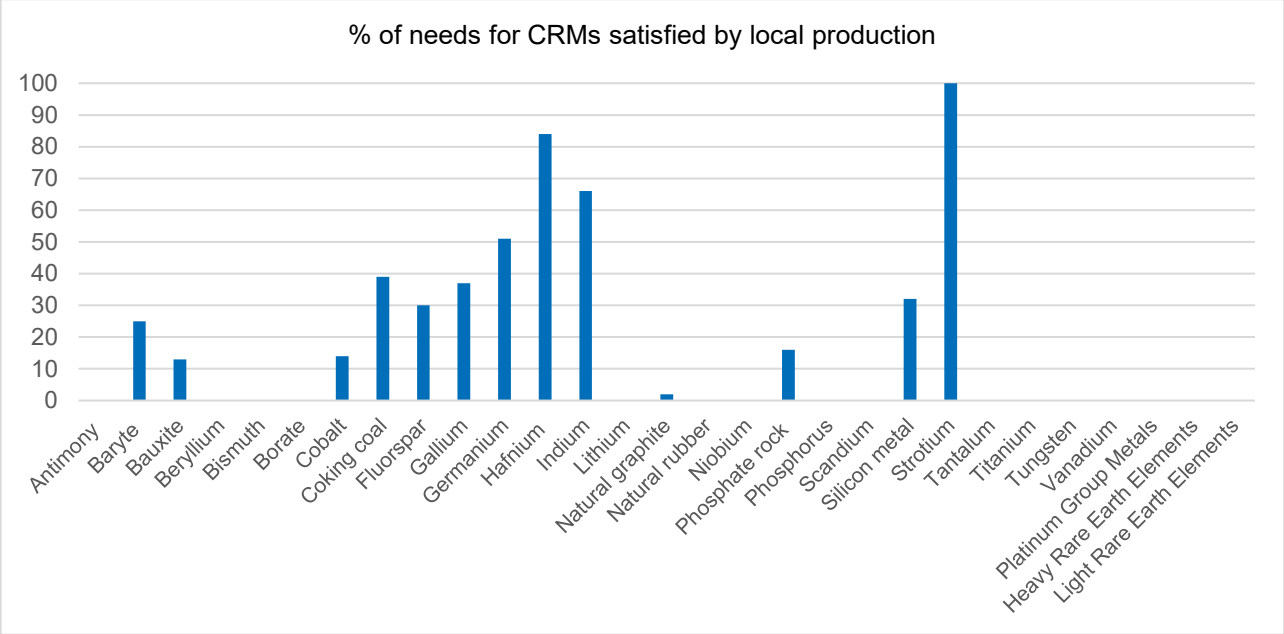


Source: Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability (COM(2020) 474 final)

According to the 2020 Commission Communication on CRMs, local production was responsible for meeting only partially the EU needs (Figure 58).

[491] European Commission. (2020). Critical raw materials resilience: Charting a path towards greater security and sustainability [COM(2020) 474 final]. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52020DC0474.

Figure 58. % of needs for CRMs satisfied by local production



Source: Critical Raw Materials Resilience: Charting a Path towards greater Security and Sustainability (COM(2020) 474 final)

The KPI for raw materials concentrate production falls under Strategic Objective 1: Securing a Stable Raw Materials Supply. Notably, EIT RawMaterials reported a 50% increase between 2016 and 2023, showing progress already made in this area.[492]

This goal is being pursued primarily through the KIC's Acceleration pillar, which integrates innovation and business creation to strengthen Europe's raw materials ecosystem. Key elements of this approach include:

- Upscaling (UPS): Supporting the scaling up of technologies to industrial applications.
- Start-up creation and growth: Fostering ventures that deliver innovative solutions for raw materials supply.
- Agile funding mechanisms: Moving from large annual calls to smaller, flexible within-the-year calls, including Acceleration and Booster calls, SME-support calls, fast-track calls, and Knowledge Creation and Dissemination calls.

Through this strategy, EIT RawMaterials aims to mobilise a wide range of actors: start-ups, SMEs, industry leaders, and research organisations, to deploy technologies and solutions that increase the production of concentrates in Europe.[493]

This approach is further operationalised in the Business Plan 2023–2025, which foresees the launch of more than 30 new projects to upskill, educate, and advance RIS activities in 2023 and 2024. These join the portfolio of projects initiated under BP2021/2022 and are designed to deliver impact and contribute to a sustainable standard of living across Europe.

In parallel, more than 40 ERMA[494] investment cases are being advanced, with an estimated investment volume close to EUR 18 billion. Many of these cases emerge directly from the KIC's own innovation and business-creation

[492] European Commission. (2025). Interim evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021–2024): Annex 27 – Evaluation of EIT RawMaterials. SWD(2025) 110 final. https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52025SC0110.
[493] EIT RawMaterials Strategic Agenda 2021-2027.
[494] https://erma.eu/.

activities, providing access to finance and customers and helping increase the production of raw material concentrates within Europe.

The following Table 106 provides an overview of the impacts achieved for the KPI Percentage increase in raw materials concentrate produced.

Table 106. Percentage increase in raw materials concentrate produced 2% by 2024

Impact indicators	Targets	Impacts achieved
Percentage increase in raw materials concentrate produced	2% by 2024 5% by 2027	The KPI on the percentage of raw materials concentrate produced is assessed through the portfolio of projects supported by EIT RawMaterials. Each project is required to set annual targets (planned figures) for its KPIs, which serve as the benchmark for measuring progress. In the first quarter of the following year, projects submit the figures achieved (reported values), which are then compared with the planned targets. If the reported figure is equal to the planned target, a simple Declaration on Honour (DoH) is sufficient. If the reported figure is either higher or lower than the target, the DoH must be accompanied by a deviation explanation that outlines the reasons for underperformance or highlights good practices that enabled overachievement. If the reported figure is zero, only a deviation explanation is required, as no DoH is applicable without measurable progress.[495] In the case of the concentrate production, a specific KPI was developed KICN-1-01, where the percentage increase is self-assessed by the projects and documented in the DoH, which must include mandatory elements: • a description of the substitution, explaining what material has been replaced with what; • a comparison table showing the characteristics of the original material and its replacement. • proof of commercialisation or evidence that the solution has reached at least Technology Readiness Level (TRL) 7. • and proof of acceptance by the end user. For cases reported prior to 2019, documentation could consist of the name and type of the substitution case, along with a feasibility study. The reported calculations were: if a concentrate was produced that had not previously been available (e.g. scandium), it is considered a 100% increase. In other cases, the increase was marginal, as the percentage of raw material produced in Europe was initially low but improved slightly through the initiative, although it remains a very small proportion (in the scale of EU). This scale should be taken into account: if there was no prior production, the increase is considered 100%.

KPI	2021	2022	2023	2024[496]
KICN01-01[497]	0%	100%	100%	100%

[495] EIT RawMaterials internal material sent with the data.
[496] EIT RawMaterials internal monitoring data; from 2016 to 2018 the KPI code is IMP01.02. From 2019 to 2024 the code is KICN01-01. The change of code was due to a KPI system update.
[497] Internal data of EIT RawMaterials.

Impact attribution

The indicator “Percentage increase in raw materials concentrate produced” measures EIT RawMaterials’ contribution to strengthening Europe’s raw materials supply by supporting projects that increase concentrate production within the EU. The reported 50% increase between 2016 and 2023 significantly exceeds the targets of 2% by 2024 and 5% by 2027, confirming that EIT RawMaterials’ interventions, such as funding, technical support, and ecosystem facilitation, have enabled projects to reach commercialisation and industrial application.

While these results demonstrate strong performance within the KIC’s portfolio, the overall share of raw materials concentrate produced in Europe remains very small compared to global supply. EU-level data confirm that Europe continues to rely heavily on imports for critical raw materials. Therefore, the reported increases represent important progress within EIT RawMaterials’ sphere of influence, but do not yet translate into systemic change at the EU level. The alignment of these activities with EU policy priorities, such as the CRM and the European Raw Materials Alliance (ERMA), reinforces the plausibility that EIT RawMaterials is contributing to broader strategic objectives.

This KPI is best understood as evidence of a project-level outcome indicator, with a strong contribution claim from EIT RawMaterials’ activities. While the reported outputs are directly linked to EIT RawMaterials-supported projects, broader outcomes, such as long-term competitiveness or resilience of European supply chains, are influenced by external factors, including commodity price fluctuations, national mining policies, and co-investment from industry and public sources. Its scope is also limited, as it measures relative percentage increases, that can appear large when starting from a low baseline, and does not capture absolute production volumes, the sustainability of production, or the systemic impact on Europe’s raw materials supply.

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Table 107. Impact attribution “Percentage increase in raw materials concentrate produced”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Percentage increase in raw materials concentrate produced	This indicator measures the relative increase in concentrate production achieved by projects supported by EIT RawMaterials. The logic assumes that EIT RawMaterials’ funding, technical expertise, and ecosystem facilitation played a critical role in enabling these projects to reach commercialisation and scale.	**Contribution** – EIT RawMaterials made a material contribution, but systemic change depends on multiple actors and external factors.	**Moderate –** Based on internal reports and Declarations on Honour submitted by projects, including supporting documentation such as proof of substitution, comparison tables, and evidence of commercialisation or end-user acceptance.	**Scope limitations:** The indicator measures relative percentage increases, which can appear large when starting from a low baseline, and does not capture absolute production volumes, sustainability, or systemic impact. **External factors:** Broader outcomes depend on commodity prices, national mining policies, and co-investment from industry and public sources. **Attribution complexity:** While outputs are linked to EIT RawMaterials-supported projects, systemic resilience and competitiveness involve multiple actors and policy frameworks.

4.5.3.2 Critical raw materials substitution/reduction

Number of cases or critical raw materials substitution/reduction

Raw materials are fundamental to Europe's economy, forming the backbone of its industrial base and enabling the production of a wide range of everyday products and advanced technologies. Ensuring secure and uninterrupted access to certain raw materials has become an increasing concern both within the EU and globally. To tackle this issue, the European Commission has developed a list of CRMs for the EU, which is regularly reviewed and updated. These CRMs are defined by their significant economic importance to the EU and the high risk associated with their supply.

Since 2011, a report has been released every three years to evaluate materials classified as critical.[498] In 2020, the European Commission conducted a foresight study focused on critical raw materials essential for strategic technologies and sectors within the EU. This study highlighted 24 key materials vital to three main sectors: renewable energy, electric mobility, and defence and space industries.[499]

A June 2025 Eurostat overview of the critical raw materials status quo in the EU, revealed that the Union suffers from very skewed trade balances, still being heavily dependent on imports of CRMs[500]:

Rare Earth Elements (REE+)

- **Trade Trends:** Imports rose in 2022, stabilised in 2023, and dropped sharply in 2024. Prices fell in 2023 but returned to 2022 levels in 2024.
- **Trade Balance:** In 2023, the EU imported 2,3 tonnes for every tonne exported.
- **Main Suppliers:** China (46%), Russia (28%), and Malaysia (20%). For most products, over 90% of imports came from the top three suppliers.

Magnesium

- **Trade Trends:** Imports were stable until 2021, surged in 2022 (+27%), then declined in 2023 (-33%) and 2024 (-2%). Exports followed a similar pattern.
- **Prices:** Sharp increase in 2022, followed by a decline in 2023–2024.
- **Dependency:** The EU relied heavily on China, which supplied 96% of magnesium imports.
- **Trade Balance:** The EU imported 13,5 tonnes for every tonne exported.

Ferro-niobium

- **Trade Trends:** Relatively stable imports and exports from 2019 to 2024.
- **Prices:** Import prices rose from EUR 19,2/kg to EUR 24.,7/kg; export prices to EUR 27,3/kg.
- **Main Suppliers:** Brazil (86%) and Canada (14%).
- **Trade Balance:** The EU imported 7,4 tonnes for every tonne exported.

Borates

- **Trade Trends:** Imports increased from 423k to 441k tonnes (2023–2024); exports slightly declined.
- **Trade Balance:** 11 tonnes imported for every tonne exported.

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[498] European Commission. RMIS – Raw Materials Information System. https://rmis.jrc.ec.europa.eu/eu-critical-raw-materials
[499] European Commission: Directorate-General for Internal Market, Industry, Entrepreneurship and SMEs. Bobba, S., Carrara, S., Huisman, J., Mathieux, F. et al. (2020), Critical raw materials for strategic technologies and sectors in the EU – A foresight study, Publications Office, https://data.europa.eu/doi/10.2873/58081
[500] Eurostat. International trade in critical raw materials. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=International_trade_in_critical_raw_materials.

- **Main Suppliers:** Turkey (81%) and the U.S. (15%). Turkey was a top-3 supplier for nearly all borate types.

Gallium

- **Trade Trends:** Imports and exports rose until 2022, then dropped sharply by 2024 (imports -48%, exports -75%).
- **Prices:** Continued to rise through 2022–2024.
- **Main Suppliers:** China (73%), Canada (13%), and Russia (11%).

Antimony

- **Trade Trends:** Imports slightly declined (25k to 24k tonnes), while exports rose (8,1k to 9,3k tonnes).
- **Prices:** Peaked in 2024 after a dip in 2023.
- **Main Suppliers:** Tajikistan (54%), China (16%), and Vietnam (9%).

Natural Graphite

- **Trade Trends:** Imports peaked in 2023 (163k tonnes), then dropped to 95k tonnes in 2024. Exports remained low but stable.
- **Prices:** Import prices rose 28% (2019–2024); export prices recovered after early declines.
- **Main Suppliers:** China (38%), Madagascar (22%), and Mozambique (17%).
- **Trade Balance:** The EU imported 9,6 tonnes for every tonne exported.[501]

While the goal under this impact KPI are realised through the same mechanisms as for the above-mentioned impact of increased concentrate produced. In this context, however, the mechanism of KAVA is of special importance. KAVA (KIC Added Value Activities) are the core project activities through which EIT RawMaterials delivers on its three strategic objectives. They are the primary funding mechanism in the Acceleration activity area, which engages start-ups, SMEs, research institutions, and larger industrial players through agile instruments. These include regular KAVAs, Acceleration and Booster calls, SME-support calls, fast-track calls, and Knowledge Creation and Dissemination calls.

The KAVA framework is designed to accelerate the commercialisation of innovative technologies, products, and services in mining, materials processing, and recycling. For example, the current KAVA Call 13: Upscaling supports innovation projects that take technologies beyond the laboratory stage (minimum TRL 5) and move them toward market readiness (TRL 8).

In the ongoing KAVA call, projects are funded between 500 000 and EUR 2,5 million, with higher amounts possible in exceptional cases. They run for a maximum of 2,5 years, with preference given to shorter, impact-driven projects.

The following Table 108 provides an overview of the impacts achieved for the KPI Number of cases or critical raw materials substitution/reduction.

[501] Ibid.

Table 108. Number of cases or critical raw materials substitution/reduction

Impact indicators	Targets	Impacts achieved
Number of cases or critical raw materials substitution/reduction	80 by 2024 100 by 2027	The KPI was introduced in the Strategic Agenda 2021–2027 as part of EIT RawMaterials' effort to monitor and demonstrate progress in reducing Europe's dependency on critical imports. This KPI measures the number of marketed innovations that successfully substitute or reduce CRMs (dedicated KIC KPI KICN01-13). ▶ Substitution refers to new technologies that replace a critical material with an alternative, less critical material. ▶ Reduction refers to new technologies that reduce the amount of critical material required compared to previous solutions. The calculation of this KPI is based on a dedicated self-assessment process, documented through a DoH submitted by the project partners. For accountability and consistency, the DoH must include the following elements: ▶ The origin of the raw material (from the supplier), accompanied by a certificate of origin. ▶ The percentage of the raw material produced in Europe, reported at the beginning of the project, at its end, and, if possible, after the funding period. ▶ A detailed explanation of the substitution or reduction achieved, with a comparison to the previous technology or material used. This KPI follows the same strict reporting rules applied to other impact indicators, as introduced. Noteworthy examples demonstrate the impact of this KPI in practice. Substitution: ▶ Alternatives to cobalt in rock drilling and metal machining (2017), as cobalt may be considered toxic. ▶ Nickel-free alternatives for stainless steel and C40 steel (HiPAM, NEWMAN 2024). ▶ Electrocatalyst development (ALPE 2024). ▶ Replacement of graphite with silicon (ESiLibillion 2023). ▶ Substitution of steel with aluminium for weight reduction – robot system with bionic arms (SAMOA 2021). Reduction:

- Aluminium alloy with significantly reduced silicon content, from 9g per 100g to 0,5g per 100g (CastQC 2017).
- Steel with reduced iron content (CarSiFer 2022)

While the KIC was not able to fully reach the intended target of 80 cases of substitution/reduction, achieving a total of 71 cases as of 2024, this nonetheless represents a considerable impact.

KICN01-13[502]	2017	2018	2019	2020	2021	2022	2023	2024
Value	3	11	6	12	13	13	6	7
Running total	3	14	20	32	45	58	64	71

[502] Internal data of EIT RawMaterials.

Case study: EIT RawMaterials Accelerator

Initiative highlights

The EIT RawMaterials Accelerator, active from 2018 to 2023, was designed to support early-stage European start-ups in the raw materials sector. Its core mission was to bridge the gap between technological innovation and market adoption, an urgent societal challenge.

Throughout its operation, the Accelerator empowered dozens of ventures by helping them shape viable business models, secure investment, and scale breakthrough solutions. Among its impacts were the creation of new jobs, the development of novel raw material technologies, and the attraction of significant follow-on investment. One notable example is AM 4 AM, a Luxembourg-based venture developing advanced metal powders for 3D printing, which, with EIT RawMaterials support, grew into a promising player in additive manufacturing.

Context and rationale

The EIT RawMaterials Accelerator was created in response to a set of recurring challenges faced by early-stage companies in the raw materials sector. Many of these ventures emerged from universities or research institutions and were founded by technically skilled individuals, such as PhD graduates, with innovative ideas seeking support and business expertise to turn them into viable enterprises.[503]

A key barrier is the limited business acumen of technical founders. While their ideas show strong scientific or technological potential, many struggle to identify target markets, understand customer needs, or define a compelling value proposition. Without these elements, even highly innovative solutions risked failing to achieve market traction.

The sector itself also posed specific structural difficulties. Long sales cycles, reliance on significant capital expenditure (CAPEX), and complex industrial supply chains make it particularly challenging for young companies to gain momentum. For some, the challenge was even more basic: they did not know where or how to start the process of building a business around their innovation.[504]

The EIT RawMaterials Accelerator was modelled on existing EIT accelerator programmes (see below) and targeting commonly recognised barriers faced by early-stage ventures: lack of business structure and market understanding, a need for tailored advice in critical areas for scaling and growth, and a demand for targeted support as companies mature.[505] The programme is also consistent with the strategic objectives of EIT RawMaterials[506] and complementary to wider EU policy frameworks, particularly the European Green Deal[507] and the European Raw Materials Alliance (ERMA), managed by the KIC on behalf of the European Commission.[508] At the same time, it reflects and reinforces national-level accelerator and circular-economy initiatives ,[509] while offering a distinct form.

About the initiative

Therefore, the EIT RawMaterials Accelerator was established to support innovation and entrepreneurship in the raw materials sector by equipping technically driven founders with the structure, coaching, and financial support needed to transform ideas into sustainable businesses. It ran from 2018 until 2023, with the final cohorts completing activities in 2024.[510]

The programme's design initially drew on a methodology developed for EIT Climate-KIC and adapted to the specific conditions of the raw materials sector. Its core focus was to help entrepreneurs translate research and technical concepts into viable businesses by addressing four key areas: product, market, team, and funding. The Accelerator was conceived as a 15–18-month engagement with early-stage companies, some of which were not yet formally incorporated. It was structured into three phases:

- Phase 1 (3 months): Introduction to business fundamentals, including identifying a "beachhead market," engaging first potential customers, and preparing a customer-focused pitch deck.
- Phase 2 (6 months): Further development of the business model, with emphasis on securing first customers or pilots and clarifying financial needs.
- Phase 3 (6–9 months): Only selected ventures with clearer business models and stronger growth potential received tailored growth support, focusing on scaling, internationalisation, and addressing company-specific challenges. This phase was gradually refined to move beyond generic coaching and instead provide specialised expert support in areas such as IP, legal issues, business modelling, communications, and supply chain management; this evolution allowed the programme team to tailor support more closely to company-specific growth challenges.[511]

Financial support was also provided, in staged "tickets" linked to phases, with the total amount disbursed averaging EUR 80 000–100 000 per company over the whole duration of the programme. The programme also had financial agreements with companies in later stages of maturity. [512]

The EIT RawMaterials Accelerator has delivered impactful results, including training 121 participants, developing over 20 innovative products or services, creating new start-ups, and organising multiple events and workshops to foster innovation and collaboration in the raw materials sector.

The Accelerator was discontinued in 2023 to allow EIT RawMaterials to put more focus on the Booster Programme, which offers larger financial "tickets" and targeted support for advanced ventures.[513] At the same time, a simplified version of the Phase One methodology continued in the pre-accelerator Jumpstarter Programme, dedicated to early-stage innovators.[514] In this way, while the EIT RawMaterials Accelerator ended, its methods and lessons spilt into successor programmes.[515]

Societal Impacts

One of the primary impacts of the Accelerator was offering technically trained entrepreneurs their first practical experience in entrepreneurship, including what it involves and what it demands of them.[516] While the programme supported many ventures, AM 4 AM illustrates its contribution particularly well.

Founded in 2019 and headquartered in Luxembourg, AM 4 AM (Advanced Materials for Additive Manufacturing) focuses on developing and commercialising new metal powders for 3D printing.[517] The company addresses a core bottleneck in additive manufacturing: the limited variety of materials available. At present, only about 2% of metals can be processed conventionally using 3D printing compared to

[503] Interview with the EIT RawMaterials representative; e.g. Musleh, M. M., Mohamed, I., Sallehudin, H., & Abushawish, H. F. (2025). University spin-off challenges and opportunities: a proposed framework of academic entrepreneurship in developing economies. Cogent Education, 12(1). https://doi.org/10.1080/2331186X.2025.2530894;
[504] Interview with the EIT RawMaterials representative
[505] Ibid.
[506] EIT RawMaterials Strategic Agenda 2021-2027
[507] European Commission. The European Green Deal Striving to be the first climate-neutral continent. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/european-green-deal_en
[508] European Raw Material Allaince.https://erma.eu/
[509] E.g. Germany's High-Tech Gründerfonds (https://www.htgf.de/en/venture-capital-investor-2/), or French BPI (https://www.bpifrance.com/)
[510] Interview with the EIT RawMaterials representative
[511] Interview with the EIT RawMaterials representative; https://www.eit.europa.eu/our-activities/opportunities/eit-rawmaterials-accelerate-your-solution-market-rm-accelerator
[512] Interview with the EIT RawMaterials representative, interview with programme beneficiary.
[513] EIT RawMaterials. (2025). ERMA Booster Call for Start-ups, Scale-ups,and Advanced Projects in Mining, Materials Processing & Recycling. https://eitrawmaterials.eu/sites/default/files/2025-01/2025-01-27_EIT_RawMaterials_Booster_Call_2025_Guidelines.pdf
[514] EIT Community Jumpstarter. EIT Innovation Awards 2025. https://eitjumpstarter.eu/
[515] Interview with the EIT RawMaterials representative
[516] Ibid.
[517] Advanced Materials for Additive Manufacturing. We create materials that shape the future. https://www.am-4-am.com/; EIT Raw Materials. AM 4 AM: Reshaping the future of 3D metal printing. https://eitrawmaterials.eu/success-stories/am-4-am-reshaping-future-3d-metal-printing

traditional manufacturing techniques. AM 4 AM's technology seeks to expand this range, allowing industrial manufacturers to access high-performance materials for demanding applications.[518] In doing so, the company directly tackles a challenge identified in the raw materials sector, aligning its mission with the EIT RawMaterials and, broadly, EU goals.

Before joining the EIT RawMaterials Accelerator, their initial proof of concept was made possible through essential funding from the European Commission's Horizon 2020 programme, followed by further support from Luxembourg's Fit 4 Start initiative.[519] That initiative was broader in scope and helped the company secure its first business angel investment. Building on this foundation, the EIT RawMaterials Accelerator provided a more specialised, in-depth experience tailored to the raw materials sector. It enabled the venture to go further in refining its business model, strengthening its marketing approach, and learning how to frame value propositions and revenue strategies more effectively.[520]

At the time AM 4 AM entered the Accelerator, the CEO was working almost alone following the departure of a co-founder. The Accelerator played a decisive role in the venture's early development, particularly during this critical period. Since then, the company has grown steadily to six employees, with further expansion planned. EIT RawMaterials acted as the first investor, providing initial funding that enabled the company to secure a seed round of 1,3 million EUR. The funding helped in building the company's facility, which now houses around 15 pieces of equipment for material characterisation and the production of 3D-printed samples. This early financial commitment was considered "taking the first risk" and was essential in building confidence among other investors, acting as a crucial "first building block".[521]

The coaching component was equally significant. Regular discussions with mentors helped the team refine sales strategies and business assumptions, saving valuable time. One piece of advice: to read *The Mom Test* on customer conversations, which proved so influential that the CEO now provides the book to all new sales employees. Still, both elements of the Accelerator were recognised as equally valuable and complementary:

> *EIT Accelerator really gave confidence to other actors and other funds to follow us in the development. And so, this is, I think, how in two ways the EIT Accelerator really helped us go through this difficult period: in terms of funding, and challenging our assumptions and refining them.*
>
> *AM 4 AM CEO*

AM 4 AM's success within the Accelerator ultimately led EIT RawMaterials to take on the role of shareholder in the company through an equity agreement.[522] This signified not only confidence in AM 4 AM's growth potential but also a commitment to maintaining a long-term partnership. As a shareholder, EIT RawMaterials continues to provide support through its network, particularly in supply chain-related areas, which the company has found highly valuable. The relationship is found to be constructive and beneficial, with AM 4 AM actively leveraging EIT RawMaterials' European reach as it scales its business.[523]

Today, AM 4 AM's powders are already commercially available and in use by pilot customers. With its current focus on strengthening the European supply chain while also attracting interest from international partners in the

[518] Interview with programme beneficiary.
[519] EIT Raw Materials. AM 4 AM: Reshaping the future of 3D metal printing. https://eitrawmaterials.eu/success-stories/am-4-am-reshaping-future-3d-metal-printing
[520] Ibid.
[521] Ibid.
[522] Interview with the EIT RawMaterials representative, interview with programme beneficiary.
[523] Ibid.

United States, Taiwan, and Japan, the company demonstrates how the EIT RawMaterials Accelerator can help transform early-stage technical ideas into globally competitive ventures.[524]

Impact attribution

The indicator "Number of cases of critical raw materials substitution/reduction" measures EIT RawMaterials' contribution to reducing Europe's dependency on imported CRMs by supporting innovations that either replace critical materials with less critical alternatives (substitution) or reduce their use in production processes (reduction).

As of 2024, EIT RawMaterials achieved 71 cases of substitution or reduction, slightly below the 2024 target of 80 but representing substantial progress compared to the baseline in 2017 (3 cases). These results indicate that EIT RawMaterials is moving in line with EU strategic objectives under the Critical Raw Materials Act and ERMA, which prioritise diversification and substitution as key levers for supply security.

However, EU-level trade data show that overall dependency remains extremely high. For example, 96% of magnesium imports still come from China, and the EU imports 2,3 tonnes of rare earth elements for every tonne exported. This context underscores the importance of substitution and reduction as complementary strategies to extraction. While EIT RawMaterials' 71 cases represent a meaningful contribution within its portfolio, they do not yet translate into systemic change at the EU level. The alignment of these activities with EU policy priorities reinforces the plausibility that EIT RawMaterials is contributing to broader strategic objectives.

The attribution claim is a contribution, not a full attribution. EIT RawMaterials provided critical enablers of funding, technical support, and access to networks. These helped companies develop and commercialise substitution and reduction technologies. However, these outcomes were also influenced by other factors, such as co-investment from industry, national innovation policies, and market demand. Therefore, this the KPI should be interpreted as evidence of portfolio-level contribution, not as a sole driver of EU-level dependency reduction.

[524] EIT Raw Materials. AM 4 AM: Reshaping the future of 3D metal printing. https://eitrawmaterials.eu/success-stories/am-4-am-reshaping-future-3d-metal-printing

Table 109. Impact attribution “Number of cases or critical raw materials substitution/reduction”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Number of cases of critical raw materials substitution/reduction	This KPI measures the number of marketed innovations that achieve substitution or reduction of CRMs, and were developed through EIT RawMaterials-supported projects. The logic assumes that EIT RawMaterials provided critical enablers (funding, technical support, and access to networks) that helped companies develop and commercialise these technologies. However, other factors such as co-investment, national policies, and market demand also contributed.	**Contribution** – EIT RawMaterials helped companies achieve these results, but cannot claim full attribution.	**Moderate –** Based on internal reports and Declarations on Honour submitted by projects, including supporting documentation such as certificates of origin, percentage of CRM reduction, and comparison with previous technologies.	**Scope limitations:** The KPI counts cases but does not measure the scale of substitution/reduction or its effect on overall CRM demand. **External factors:** Global market dynamics, national policies, and industrial co-investment strongly influence systemic outcomes. **Attribution complexity:** While EIT RawMaterials provided essential support, achieving substitution/reduction also depended on company capabilities, regulatory frameworks, and market conditions.

4.5.3.3 Advanced materials produced

Percentage increase in advanced materials produced

There is evidence of efforts to support the goals of the European Critical Raw Materials Act, including reducing reliance on imported CRMs and promoting circular, sustainable supply chains. For example, the following Horizon-funded projects addressed the optimisation of raw materials production:[525]

- **SEA4VALUE and SEArcularMINE** focused on extracting valuable minerals and CRMs from brine waste, including from seawater desalination and Mediterranean saltworks.
- **AlSiCal** created a zero-waste, carbon-neutral process to produce silica, alumina, and calcium carbonate from anorthosite rock.
- **BIORECOVER and RAWMINA** developed bio-based technologies to recover CRMs from industrial and mining waste.
- **PEACOC** recovered precious metals from end-of-life products like circuit boards, car catalysts, and solar panels.
- **BlackCycle** turned used tyres into new ones, while ICEBERG reused construction waste to create high-recycled-content building materials.
- **SUNRISE** developed a sensor-based sorting tool for recycling polyvinyl butyral (PVB) from car and building glass.
- **PHOTORAMA** advanced recycling methods for recovering components from discarded photovoltaic panels.

The following Table 110 provides an overview of the impacts achieved for KPI Percentage increase in advanced materials produced/Number of new advanced materials developed/Improved products with less toxic materials.

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[525] European Commission. CORDIS - EU research results. Innovative technologies strengthening the European raw materials production. https://cordis.europa.eu/article/id/453639-innovative-technologies-strengthening-the-european-raw-materials-production.

Table 110. Percentage increase in advanced materials produced/Number of new advanced materials developed/Improved products with less toxic material

Impact indicators	Targets	Impacts achieved
Percentage increase in advanced materials produced. Number of new advanced materials developed. Improved products with less toxic materials.	2% increase, 2 advanced materials, 58 improved products by 2024 5% increase, 5 advanced materials, 70 improved products by 2027	This KPI was introduced in the Strategic Agenda 2021–2027 as part of EIT RawMaterials' initiative to monitor and demonstrate progress in the production of advanced materials. Specifically, KPI KICN01-16 tracks the number of marketed innovations that successfully contribute to the development of advanced materials. The KPI is assessed through a structured self-evaluation process (as for other KPIs included above), documented via a DoH submitted by project partners. For transparency and consistency, the DoH must include: • A statement indicating the percentage of production at both the start and end of the funding period. • Calculations supporting both reported percentages. Examples reported include scandium, where production increased by 100%, ferroalloys, and oxide slags (calcium aluminate), where a 0,27% increase was reported. Together, these three instances were counted toward the indicator, enabling the 2024 target for the KPI to be met. Data on products with less toxic materials was not available.

KPI[526]	2021	2022	2023	2024
KICN01-16 number	0	0	1	2
KICN01-16 %	-	-	100%	100,27%

[526] Internal data of EIT RawMaterials

Impact attribution

The indicator “% increase in advanced materials produced” is intended to measure EIT RawMaterials’ contribution to the development and production of advanced materials in Europe. This supports the overarching objective of strengthening the EU’s industrial base and reducing reliance on imports. Advanced materials are critical for high-tech applications, energy transition technologies, and sustainable manufacturing, making this KPI strategically important for competitiveness and resilience.

EIT RawMaterials has achieved its 2024 target, reporting increases in production for materials such as scandium and ferroalloys. However, these results should be interpreted in context: while the reported percentage increases appear significant (e.g. 100% for scandium), they often start from very low baselines and represent niche applications rather than large-scale industrial volumes. At the EU level, there is limited evidence of systemic growth in advanced material production, and dependency on imports for critical inputs remains high.

Although EIT RawMaterials provided essential enablers that helped companies develop and scale advanced materials, the evidence is based on a small number of reported cases, often starting from very low baselines, and lacks independent verification of absolute production volumes or market impact. Broader outcomes, such as strengthening Europe’s industrial competitiveness or reducing import dependency, depend on multiple factors, including global market dynamics, national industrial policies, and co-investment from private actors. Therefore, this indicator should be seen as an indication of portfolio-level progress rather than an attribution claim.

Table 111. Impact attribution "Percentage increase in advanced materials produced/Number of new advanced materials developed/Improved products with less toxic materials"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Percentage increase in advanced materials produced.	This indicator measures the relative increase in advanced material production achieved by EIT RawMaterials-supported projects. The logic assumes that EIT RawMaterials' involvement was critical in enabling these outcomes, but acknowledges that other factors, such as market demand, regulatory frameworks, and industrial co-investment, also contributed.	**Contribution** – EIT RawMaterials helped companies achieve these results, but cannot claim full attribution.	**Moderate confidence** – Based on internal monitoring and Declarations on Honour submitted by projects, including supporting documentation on production levels and calculations. Data is validated internally for completeness but relies on self-reporting and does not include independent verification of absolute production volumes or market impact.	**Scope limitations:** The KPI measures relative percentage increases, which can appear large when starting from a low baseline, and does not capture absolute production volumes or systemic impact. **External factors:** Broader industrial competitiveness depends on global market conditions, national policies, and co-investment. **Attribution complexity:** While EIT RawMaterials provided essential support, scaling advanced materials production requires coordinated action across the value chain and enabling policy frameworks.

4.6 EIT Food

EIT Food inspires, coordinates, and funds a network of world-class partners to drive transformation across the food system. Its mission is to improve human and environmental health by reshaping how food is produced, distributed, and consumed while enhancing its value to European society. To achieve this mission, EIT Food tackles major innovation challenges through collaboration among trusted industry, education, and research partners and informed and engaged citizens.

EIT Food envisions a world where everyone can access and enjoy sustainable, safe, and healthy food, with trust and fairness from farm to fork. This vision is pursued through systemic transformation, driven by consumer-centric, connected, and collaborative innovation aimed at solving the most pressing shared challenges in the food sector. Those goals are intended to be realised through strategic objectives:

- **Strategic Objective 1**: Address low consumer trust in food and change attitudes toward healthy nutrition and sustainability by engaging citizens to promote an appreciation of food 'value' and sustainable 'cost'. This involves citizens becoming engaged, active participants in innovation, advocates for change, and investors in the food system's improvements.
- **Strategic Objective 2**: Enabling healthier and more sustainable individual consumer choice. Enable individuals to make informed and affordable personalised nutrition choices through direct engagement, new product concepts, informative packaging, and e-communication innovations.
- **Strategic Objective 3**: Build a consumer-centric connected food system across Europe. Enable the development of a digital food supply network in which consumers and other ecosystem players are equal partners to improve ingredient safety, real-time traceability, quality, and sustainability.
- **Strategic Objective 4**: Enhance sustainability through resource stewardship to develop integrated solutions that transform the traditional linear ‘produce-use-dispose’ model into a circular bioeconomy.
- **Strategic Objective 5**: Educate to engage, innovate and advance - to provide ‘food system‘ skills for students, entrepreneurs, and professionals, addressing specific skill gaps through advanced training programmes.
- **Strategic Objective 6**: Catalyse food sector entrepreneurship and innovation across Europe. Foster entrepreneurship at all stages of business creation, actively supporting the creation of start-ups and engaging SMEs to unleash their innovation potential.

The impacts of EIT Food are defined in its strategic documents. The Strategic Agenda 2021–2027 sets out the Strategic Objectives, impact goals (areas), the connection between these objectives and the UN SDGs, and subsequently outlines the actions, 2027 outcomes, and impact targets, as presented in the table in Annex 3. The outcomes and impact targets form the framework for the analysis that follows. The targets included in the analysis, linked to the selected indicators, are highlighted in bold and will be mentioned in dedicated sections that follow.

The strategic documents define the ToC for achieving the intended goals, as well as the impact pathways leading to four defined impacts. While the categories of impacts (impact goals, impacts in the ToC, and impact pathways) are labelled differently across various sections of the document, they remain broadly consistent. This does not pose any issue for interpretation. However, this should be acknowledged, as illustrated in the graphs below, which are presented verbatim.

4.6.1 Impact pathway

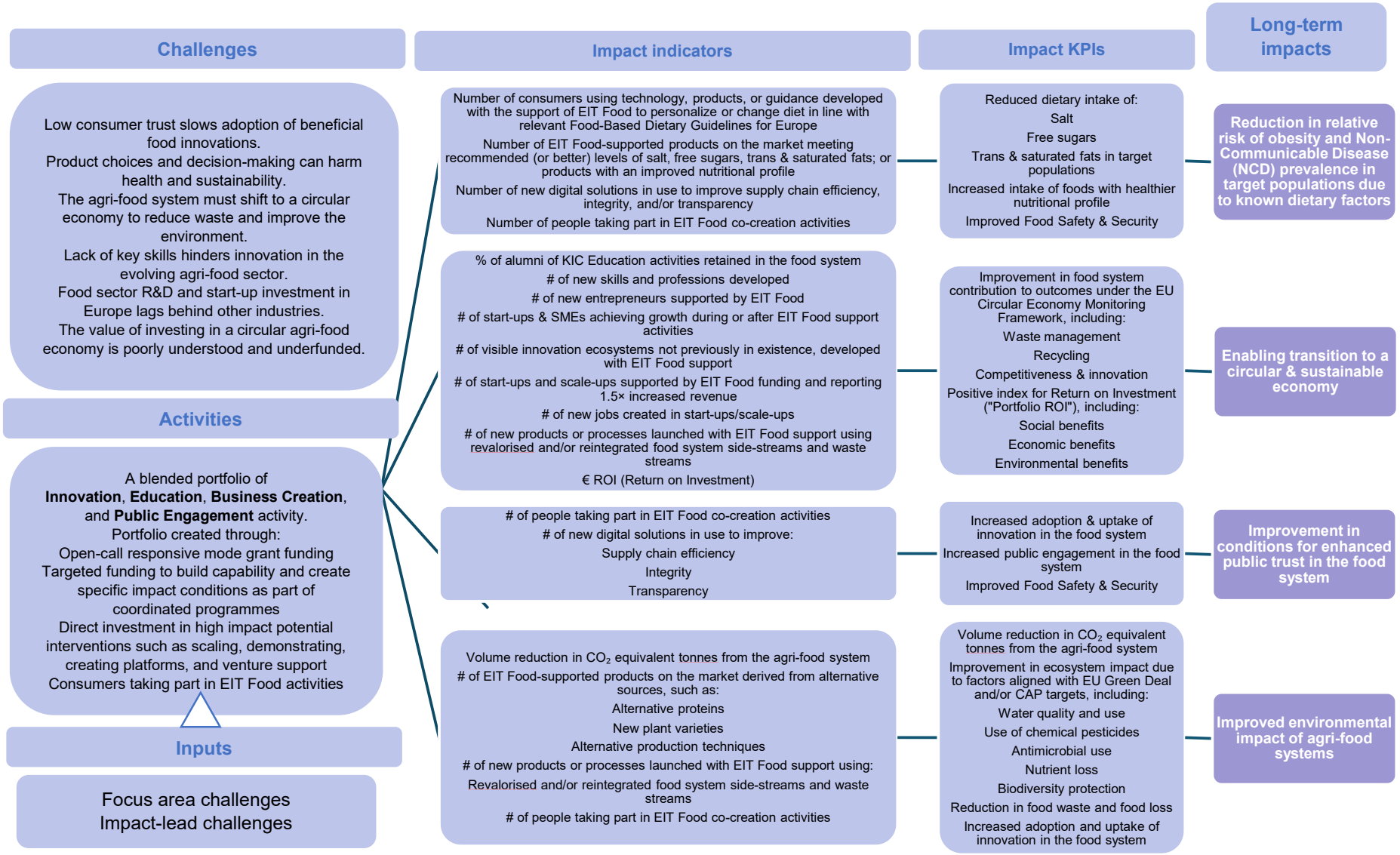
The following Figure 59 presents the ToC as directly outlined in the EIT Food Strategic Agenda 2021–2027. In this pathway, the level of EIT Food's influence varies across different stages. There is direct control over inputs and immediate results, such as the adoption of priorities, partnership arrangements, and project portfolio choices. Moving towards indirect control (results to outcomes),

EIT Food's role is to foster the increasing adoption of its supported innovations within the food system. At the level of influence (outcomes to impacts), the organisation contributes to broader, long-term effects across food systems, which are shaped by multiple external factors beyond its direct remit.

It is followed by the graph aligned with the graphs introduced for the other KICs, hence including strategic objectives, activities intended to achieve the impacts, and impact KPIs.

Figure 59. EIT Food Theory of Change

Figure 60. EIT Food impact pathway



4.6.2 Overview of the main achievements

Key achievements[527]

- ✓ **Over 1 260 start-ups supported, which have attracted EUR 1,34 billion of funding.**
- ✓ **286 innovations launched on the market, ranging from novel food products to digital platforms for supply chain traceability and farm-level efficiency.**
- ✓ **Approx. 1 130 new direct and indirect jobs created.**
- ✓ **Over 12 799 students graduated from EIT-labelled programmes.**
- ✓ **Eight skills and professions developed, focusing on areas such as agri-food entrepreneurship, digital food technology, sustainable supply chain management, food safety and quality, plant-based innovations, precision agriculture, circular economy approaches, and consumer behaviour in nutrition.**
- ✓ **63 120 consumers were supported in making healthier food choices, and 43 products with improved nutritional profiles were introduced.**

EIT Food, established in 2017 and operational since 2018, has become the world's largest food innovation community. Its mission is to accelerate the transformation of food production, distribution, and consumption to create a future-fit, healthy, and sustainable food system. EIT Food's objectives are closely aligned with the EU's Farm-to-Fork Strategy, Green Deal, and Sustainable Development Goals, addressing food security, climate change, and public health challenges.

EIT Food has delivered substantial achievements in fostering entrepreneurship, launching innovations, and building a resilient, sustainable, and consumer-centric food system. Its impact spans economic growth, job creation, skills development, environmental sustainability, and public engagement, firmly establishing it as a key driver of food system transformation in Europe and beyond.

- It has supported over 1 260 start-ups and scale-ups from 2018 to 2024, which is almost twice its original target.[528] These ventures attracted EUR 1,34 billion in private investment, five times the expected amount.[529]
- 286 innovations were launched onto the market, with 41 specifically mitigating CO_2 emissions, 26 using alternative protein sources, and 20 revalorising food system side streams, surpassing targets for environmental impact and sustainability.
- Start-ups supported by EIT Food currently employ over 10 000 FTE. The core entrepreneurship programmes alone have created an estimated 1 130 new jobs, with 227 directly attributable to EIT Food's

[527] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025;
[528] Strategic Agenda target for 2021-24 is 568. No targets for prior years available.
[529] Strategic Agenda target for 2021-24 is EUR 204,24 million.

intervention. Supported enterprises created, on average, six new jobs each, compared to one in a control group.

- Every EUR 1 invested in the core entrepreneurship programmes will generate a return of EUR 13 over 15 years, reflecting significant economic impact.

Its educational activities also exceeded targets. 12 799 students graduated from EIT-labelled programmes, of which 161 are Master's and PhD graduates, whereas a further 212 000 individuals were engaged in initiatives promoting healthier and more sustainable behaviours, exceeding targets and contributing to upskilling across the sector. Eight new skills and professions were developed in 2023, meeting the 2024 target, with a focus on entrepreneurial, technical, and digital skills for the agri-food sector.

Regarding the systemic societal and environmental impacts, EIT Food's TrustTracker® and Citizen Participation Forum engaged over 40 000 citizens, providing valuable insights to enhance consumer trust in the food value chain.

63 120 consumers were supported in making healthier food choices, and 30 products with improved nutritional profiles were introduced. Initiatives have contributed to reducing obesity and the risk of non-communicable diseases in target populations.

Related to waste reduction, 28 new products used revalorised or reintegrated food system side streams and waste streams, already surpassing the 2024 target.

As of **2024**, EIT Food has **486 active strategic partners** and engages with **4 720 stakeholders**, forming a robust pan-European innovation ecosystem. The KIC facilitates **cross-sector collaboration** among businesses, academia, NGOs, and public authorities, enabling the **transfer and upscaling of successful food system solutions** across Europe through its regional innovation mechanisms. Internationally, EIT Food maintains **global outreach and strategic partnerships**, contributing to **food security, sustainable agriculture, and healthy diets** beyond Europe.

EIT Food has achieved a strong return on public investment, with every EUR 1 of EIT funding helping to attract nearly EUR 5 in external investment (leverage factor 4,97). Between 2017 and 2023, the KIC demonstrated strong leverage of public investment, achieving a direct leverage factor of 0,23 when considering only co-funding from partners related to the EIT grant, and 0,34 when including revenues generated through KIC activities. This improved to 0,45 in the 2021-2022 Horizon Europe period. When including all activities funded directly by partners and affiliated entities (outside of EIT funding), the leverage factor rises to 1,28.

According to EIT Food's *Annual Reporting Data 2024*, the ecosystem "investment attracted by startups and scaleups" was **EUR 223 million**.[530] In 2024, they report **37 startups created**, **238 startups supported**, and **9 726 graduates** from EIT-labelled programmes.[531] Also, **7 437 students** were enrolled in EIT-labelled programmes in 2024.[532]

According to a European Commission document, by the end of 2023, EIT Food "had accumulated substantial financial reserves."[533]

[530] EIT Food. EIT Food Annual reporting 2024. https://reporting.eitfood.eu/annual-reporting-data-2024?utm_source
[531] EIT Food. EIT Food Annual reporting 2024. https://reporting.eitfood.eu/annual-reporting-data-2024?utm_source
[532] EIT. EIT Food. https://www.eit.europa.eu/sites/default/files/2025-04/EIT%20Food%20Factsheet.pdf?utm_source
[533] European Commission. (2025). Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). https://www.eu.dk/samling/20251/kommissionsforslag/kom%282025%290189/forslag/2134060/3012093/index.htm?utm_source

EIT Food reports a very high impact multiple: for every EUR 1 invested in its flagship entrepreneurship programmes, they forecast **EUR 13 return over 15 years**.[534]

Another independent assessment claims **a return of EUR 21,50 over 15 years** for every EUR 1 invested in its innovation projects (covering 2018–2024).[535]

4.6.3 Selection of societal impacts

EIT Food measures most of its societal impacts, as defined by the Impact Framework, using its internal data and conducting internal analyses. These impacts are not directly equivalent to those in the impact pathways described above, although they are closely aligned and serve the same overarching purpose: contributing to strategic goals.

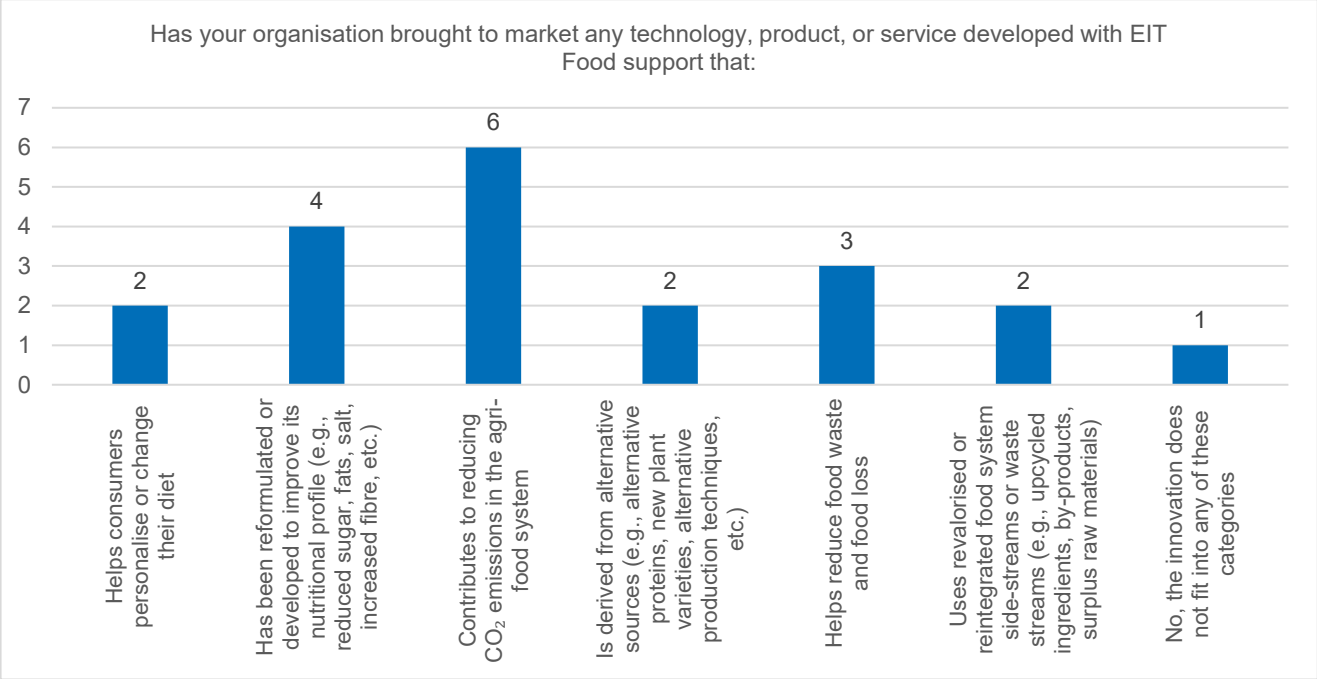
As such, the assessment is conducted internally through the analysis of a portfolio of marketed innovations. In line with the Societal Impact indicators outlined in the Impact Framework, impact is primarily evaluated based on targets and the number of marketed innovations that fall within specific categories, such as increased transparency in the food chain, waste reduction, and the development of alternative methods and products.

Accordingly, the following analysis presents data provided and self-assessed by EIT Food and should be interpreted with this context in mind. To complement these findings, a question regarding the type of marketed innovation was included in the ventures survey. Respondents who indicated that they had launched an innovation were invited to select all relevant impact areas (as defined by the Impact Framework) that they believed their innovation addressed.

Among the respondents, the most frequently selected areas were: contribution to CO_2 reduction, improved nutritional profile, and support for food waste reduction, as presented in Figure 61 below.[536]

[534] EIT Food. Every Euro invested in EIT Food's flagship entrepreneurship programmes generates a €13 return over 15 years. https://www.eitfood.eu/news/every-euro-invested-in-eit-foods-flagship-entrepreneurship-programmes-generates-a-13-return-over-15-years?utm_source
[535] EIT. (2025). IT Food: EUR 1 Investment in Agri-Food Innovation Generates EUR 21.50 Return Over 15 Years. https://www.eit.europa.eu/news-events/news/eit-food-eur-1-investment-agri-food-innovation-generates-eur-2150-return-over-15?utm_source
[536] One innovation marketed can serve multiple purposes, and have impact on different areas, so number of responses is not equivalent to the numbers of respondents

Figure 61. EIT Food marketed innovations (areas of influence) – ventures survey



Source: Ecorys, based on a survey of ventures supported

To further complement this analysis, all ventures that indicated receiving support from EIT Food, regardless of whether they had brought a solution to market, were asked to assess which areas they believed their organisation had contributed to or improved. These areas reflected those used in the assessment of marketed innovations.[537]

Among respondents who indicated any improvement, the most frequently selected area was a healthier nutritional profile (40%), while the least selected was the launch of products and processes that revalorise or reintegrate food system side streams (30%). However, overall differences across the sample of 63 responses were not statistically significant, as showcased in Table 112 and Figure 62 below.

Table 112. EIT Food ventures supported (areas of influence) – ventures survey

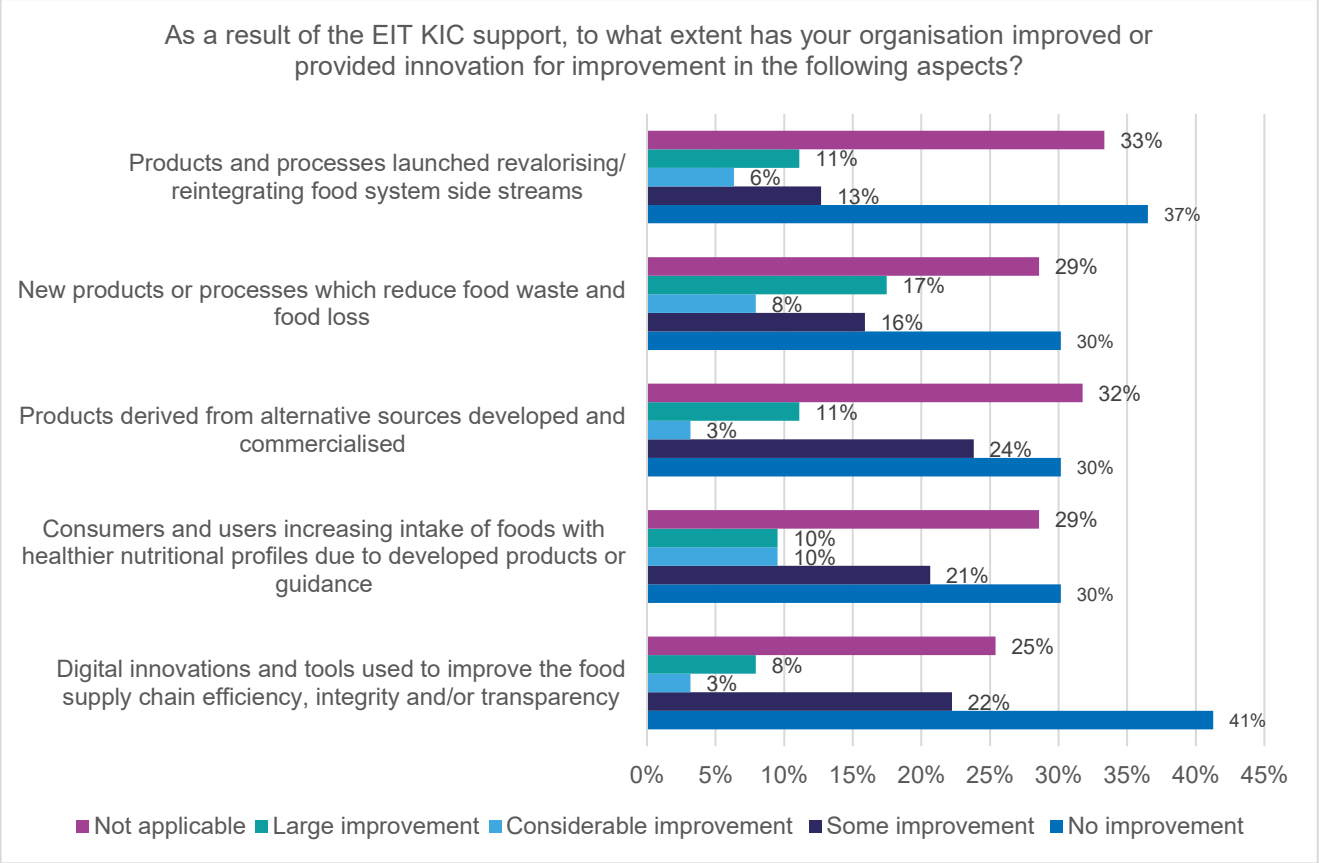
As a result of the EIT KIC support, to what extent has your organisation improved or provided innovation for improvement in the following aspects?	No improvement	Some improvement	Considerable improvement	Large improvement	Not applicable
Digital innovations and tools used to improve the food supply chain efficiency, integrity and/or transparency	26	14	2	5	16
Consumers and users increasing intake of foods with healthier nutritional profiles due to developed products or guidance	19	13	6	6	18
Products derived from alternative sources developed and commercialised	19	15	2	7	20
New products or processes which reduce food waste and food loss	19	10	5	11	18

[537] The category of CO_2 reduction was omitted from this questionnaire, as the survey question directed at ventures that marketed innovations is already reflected in EIT Food's internal data. As such, this data point, limited to marketed innovations, can supplement EIT Food's internal assessment.
Conversely, the questionnaire distributed to all ventures was based on our selected set of indicators, which did not include a measure related to CO_2 emissions.

Products and processes launched revalorising/ reintegrating food system side streams	23	8	4	7	21

Source: Ecorys, based on a survey of ventures supported

Figure 62. EIT Food ventures supported (areas of influence) – ventures survey



Source: Ecorys, based on a survey of ventures supported

Furthermore, the analysis of the Return on Investment indicator is based on independent assessments commissioned by EIT Food in 2024. No additional analysis was conducted specifically for the purpose of this report; therefore, the findings related to this indicator reflect the results of the external assessment.

4.6.3.1 Increased public engagement in the food system

people taking part in EIT Food co-creation activities

Co-creation in agri-food refers to involving stakeholders (often consumers, producers, researchers, companies, and civil society) in jointly designing, testing, or shaping food products, services, or policies. Public Engagement covers a broader set of interactions between experts, institutions, and the public, aiming at two-way dialogue that involves gaining insights, shaping trust, influencing practices and behaviour, and raising awareness.

The role of co-creation and public engagement has gained increasing recognition as a mean to build more inclusive, sustainable, and health-promoting food systems. Evidence shows that involving community stakeholders in shaping food environments, particularly in underserved or low-income areas, can lead to more effective and

lasting improvements. For example, when local actors participate in decisions about product selection, store layout, and promotional strategies, healthier food options are more likely to be adopted and sustained.[538]

These activities contribute to making innovations (new food products, packaging, sustainability, nutrition policies, etc.) relevant, acceptable, and trusted, and can increase uptake and impact.

For example, a study by the Food and Agriculture Organisation (FAO) examines the role of consumer-citizens in transitioning to sustainable agroecological food systems. It highlights how innovative business models can mediate the connection among consumers, producers, and nature, facilitating a shift from traditional supply chains to more participatory and sustainable practices.[539]

A recent analysis across Europe highlighted the value of multi-actor partnerships, involving public authorities, private sector actors, academia, and civil society, in co-creating food system solutions. These partnerships were found to contribute positively to sustainability across three key dimensions: economic viability, environmental responsibility, and social equity.[540]

Beyond retail environments, co-creation has also proven effective in addressing complex and contested issues in agriculture. A co-create project in Brussels brought together researchers, citizens, associations, and government agencies to address issues in agricultural production, food distribution, and accessibility, which led to recommendations for public authorities and highlighted the epistemological and methodological strengths and limitations of conducting co-creative research processes.[541]

Public engagement is not just product-centric but also includes educational programmes, citizen trust, transparency in packaging, and sustainable consumption, all of which are important levers.

Co-creation is a central element of EIT Food's Inclusive Innovation approach, which aims to support systemic change within the food sector. Recognised as a major feature of EIT Food's mission-led activities, co-creation is embedded directly in its Strategic Objective 1: Addressing low consumer trust in food. The explicit aim is to engage citizens not merely as passive beneficiaries but as active and equally valued participants in innovation.

EIT Food's approach to co-creation and public engagement spans multiple layers, from consumer inclusion to cross-sector collaboration. Its programmes empower people not as passive consumers but as active innovators and decision-makers shaping food systems.

EIT Food defines co-creation as a collaborative process of invention and innovation that creates new value and enables value capture for all participants. It is a transparent and iterative process, where key strategic stakeholders, including suppliers, consumers, users, and customers, work together to identify, shape, and refine ideas. Unlike traditional innovation pathways, co-creation begins at the earliest stages of the innovation cycle, covering ideation, design, and implementation, so that outcomes are mutually beneficial to all parties.

Through those activities, EIT Food seeks to empower citizens as active participants in food system transformation, recognising their lived experiences and insights as critical to shaping meaningful innovations.[542] Overall, the impact

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[538] E.g. Vargas C, Whelan J, Brimblecombe J, Brock J, Christian M, Allender S. Co-creation of healthier food retail environments: A systematic review to explore the type of stakeholders and their motivations and stage of engagement. Obes Rev. 2022 Sep;23(9):e13482. doi: 10.1111/obr.13482. Epub 2022 Jun 6. PMID: 35670030; PMCID: PMC9540769.
[539] https://www.fao.org/agroecology/database/detail/en.
[540] De Vries, H., Donner, M., Fabiano, F., Mamès, M., Lazaro-Mojica, J., Cotillas, E., .. & Voyatzakis, A. (2024). Co-creation in partnerships contributing to the sustainability of food systems: insights from 52 case studies in Europe. Frontiers in Sustainable Food Systems, 8, 1399275.
[541] Hermesse, J., Vankeerberghen, A., Lohest, F., & Truyffaut, A. (2023). Co-creative research for transitioning toward a fair and sustainable agri-food system in Brussels, Belgium. Frontiers in Sustainable Food Systems, 7, 868982.
[542] EIT Food Strategic Agenda 2021-2027.

is intended to be achieved by engaging people directly and interactively in digital public spaces to enable a better relationship with food and address concerns regarding authenticity, composition, sustainability, and food safety.[543]

EIT Food defines public engagement as "a set of diverse activities that foster a two-way dialogue between specialists and the public".[544] Through its Public Insights and Engagement Team, EIT Food:

- Enables and empowers consumers to make informed and sustainable choices.
- Influences policy and business practices by providing access to high-quality consumer insight.
- Shapes public discourse by promoting transparency and science-based information on food and sustainability.[545]

Central to achieving this impact is the **EIT Food Consumer Observatory**[546] (2023-2025), a hub for consumer insights on agri-food topics, designed to place consumer behaviour and trust at the forefront of food system trends and transformation. Its key outputs include:

- **TrustTracker**[547] is an annual survey measuring trust in the food system, confidence in food integrity, and attitudes toward healthy and sustainable diets.
- **Citizen Participation Forum**[548] is engaging approximately 300 participants through qualitative research methods such as discussions, questionnaires, photo assignments, and polls to explore themes related to food innovation.
- **Consumer Reports**[549] are regular publications covering topics such as regenerative agriculture, ultra-processed foods, eco-labelling, and emerging food trends.[550]

The EIT Food **Consumer Engagement Labs** represent one of the largest food co-creation initiatives in Europe. They function as pre-competitive workshops where segmented consumer groups collaborate directly with food producers and researchers to generate and develop new food product concepts, including products not yet available on the market. The Labs have expanded their focus to address diverse consumer groups and challenges, ranging from early pilots with senior citizens (60+) to more recent ones targeting younger demographics with packaging innovations and plant-based snack concepts.[551]

The following Table 113 provides an overview of the impacts achieved for KPI # people taking part in EIT Food co-creation activities.

[543] Ibid.
[544] EIT Food. Public Insights and Engagement. https://www.eitfood.eu/public-insights-and-engagement.
[545] EIT Food. Public Insights and Engagement. https://www.eitfood.eu/public-insights-and-engagement.
[546] EIT Food. Consumer Observatory. https://www.eitfood.eu/projects/consumerobservatory.
[547] EIT Food. Consumer Observatory. Quantitative Studies. Insights used to enhance consumer trust in the food value chain. https://www.eitfood.eu/projects/consumerobservatory/trusttracker.
[548] EIT Food. Consumer Observatory. Qualitative Studies. Consumer insights at the centre of key agrifood sector topics. https://www.eitfood.eu/projects/consumerobservatory/citizen-participation-forum.
[549] EIT Food. Consumer Observatory Reports. https://www.eitfood.eu/projects/consumerobservatory/consumer-observatory-reports.
[550] EIT Food. Consumer Observatory. https://www.eitfood.eu/projects/consumerobservatory.
[551] EIT Food. Consumer Engagement Labs. https://www.eitfood.eu/projects/eit-community-western-balkans/consumer-engagement-labs; EIT Food. About Consumer Engagement Labs. https://www.eitfood.eu/projects/ris-cel-about; EIT Food. RIS Consumer Engagement Labs. https://www.eitfood.eu/projects/ris-consumer-engagement-labs.

Table 113. # people taking part in EIT Food co-creation activities

Impact indicators	Targets	Impacts achieved
# people taking part in EIT Food co-creation activities	12 000 participants by 2024 20 000 participants by 2027	Considering the cumulative results of EIT co-creation activities, both the 2024 and 2027 targets have already been achieved and surpassed. An important aspect to highlight is the type of engagement, as the KPIs reflect different streams. The highest results are largely driven by the TrustTracker, a specific form of co-creation. Even when excluding the TrustTracker and focusing solely on KPI EITHE01.6 and the dedicated EIT Food KPI KIC01, the results still exceed the 2024 target. This adjusted figure may provide a more accurate representation of progress, given the distinctive nature and scale of the TrustTracker compared to other co-creatin initiatives. Since co-creation activities are designed to directly contribute to the strategic objective of addressing low consumer trust in food, their impact can also be assessed by measuring changes in consumer trust levels over time. Between 2018 and 2020, rising trust in the food system was correlated with increasing consumer confidence in the integrity of food products. The most significant improvement was seen in perceptions of food safety, with an 8% increase in respondents agreeing that food is generally safe and a corresponding 5% decrease in those who believed otherwise. Confidence in the healthiness and authenticity of food increased by 5%, while perceptions of taste and sustainability improved by 4%. There were also notable reductions in the proportion of consumers expressing a lack of confidence in these aspects.[552] More recent data from 2022 to 2024 shows that this trend, though slower, continues upward. Consumer confidence in food across Europe rose from 44% to 46%, with specific gains in perceived food safety (52% to 55%) and tastiness (58% to 62%).[553] The Consumer Engagement Lab, between 2019 and 2023, the initiative facilitated co-creation processes involving 106 consumer panels, 25 scientific organisations, and 55 companies across 19 European countries, resulting in the design, development, and market introduction of 30 innovative food products.[554]

[552] EIT Food. (2021). The EIT Food Trust Report 2020. https://www.eitfood.eu/reports/trust-report-2020.
[553] EIT Food. (2025). Trust Report 2024. https://www.eitfood.eu/reports/trust-report-2024.
[554] EIT Food. RIS Consumer Engagement Labs. https://www.eitfood.eu/projects/ris-consumer-engagement-labs#impact.

KPI	Cumulative up to 2023	2024
EITHE01.6 Participants involved in innovation/design testing	1 790	
KIC01 - People engaged in targeted interventions (eligible as co-creation activities)[555]	10 664	+ 2 258
TrustTracker participants involved in co-creation activities[556]	44 326	

[555] EIT Food, internal material.
[556] EIT Food, internal material

Case Study: TrustTracker

Initiative highlights[557]

EIT Food, dedicated to making our food system more sustainable, backed the development of **TrustTracker**, an annual evidence-based study that measures consumer trust in the European food system. Lack of and declining consumer trust in the food supply system has been identified as a major societal problem, and the project provides valuable insights to enhance consumer trust in the food value chain.

From 2018 until 2024, around 120 000 consumers have been surveyed across 18 countries (Belgium, Czechia, Denmark, Finland, France, Germany, Greece, Ireland, Israel, Italy, the Netherlands, Poland, Portugal, Romania, Spain, Switzerland, Turkey and the UK). The TrustTracker is an ongoing study. After the initial seven years of implementation, it lives on as a flagship study now part of the Consumer Observatory, a central hub for consumer insights on agrifood topics, powered by EIT Food.

Context and rationale

At a time when food products are increasingly brought to market with claims about their healthfulness, sustainability and authenticity, a lack of trust in food chain actors can lead to a decline in consumer confidence towards making informed food choices. This lack of trust and confidence not only hampers current actors in the food chain but also hinders necessary transformations in food systems at a moment when consumers need to shift towards more sustainable and healthier food choices.

Secondly, as the gap between food production and consumption has widened, both in terms of time and physical distance, consumers seem to feel more disconnected from producers in the supply chain. This can lead to a lack of confidence in the authenticity of food products. Finally, food scandals and scares continue to happen along the food value chain, spreading quickly across national borders, raising uncertainty among consumers.

A literature review conducted by partners revealed that consumers do not understand or trust the food industry. This is thought to be driven by the gap between what consumers want and what the food industry provides. The need emerged to understand consumer behaviour, yet no instrument existed that would be able to provide such data. Project partners filled this need by first developing a model and then a scientific data-collection tool, drawing on the broader literature on trust in the social sciences.

The TrustTracker project aligns with the EU's agenda to transform Europe's food system into a healthier, more sustainable one, while placing the citizen at the heart of these transformations. Food 2030, the EU's research and innovation policy framework, was launched in 2016 as a way to support the transition towards sustainable, healthy and inclusive food systems. The project also aligns with the European Green Deal, one of six Commission priorities for 2019-2024, and supports the Farm to Fork Strategy, adopted in 2020. The Farm to Fork Strategy is a key element of the European Green Deal, and it aims to make food systems fair, healthy and environmentally friendly.

While the food industry is eager to improve its offerings in the market to address consumer health and current environmental needs, one of its biggest challenges is consumers' trust in the food sector. Efforts to close the gap between what consumers want and need, and what the food industry as a whole provides, highlight the role of many different actors (retailers, manufacturers, government authorities and farmers) and the need for adequate tools to measure consumer trust. Without trust, it is not possible to understand and improve their confidence in food products and technologies. Understanding consumer trust is crucial to a safer, more transparent, and reliable food system.

About the initiative

As an important part of understanding this gap, EIT Food partners the University of Reading, the European Food Information Council (EUFIC), Aarhus University, KU Leuven, and the University of Warsaw developed both the model and the tool behind the TrustTracker project in 2018. As of 2023, the TrustTracker project is overseen by the Consumer Observatory with the University of Aarhus as the consortia lead. The framework allows EIT Food to measure and monitor consumer trust in the food industry and map European consumers' trust in the food value chain and its different actors from-farm-to-fork to policy.

With data tracked annually, the evidence-based model examines differences within countries and actors. It also allows partners to monitor developments and compare trust levels over time. Starting with five core European countries in 2018 and increasing these over the years, more than 120 000 consumers from 18 different European countries (BE, CH, CZ, DE, DK, ES, FI, FR, GR, IE, IL, IT, NL, PL, PT, RO, TR, UK) were surveyed by the end of 2024.

Results from the TrustTracker® show that people who exhibit trust in the food value chain (and its actors) are more confident about the integrity of their food and food technology. This underpins the link between trust and its effects, which can become key in getting consumers on board with innovative, plant-based diets that can move the EU towards a healthier and more sustainable food system.

Societal impacts

The TrustTracker project activities contribute to an improved efficiency and sustainability of food systems by providing specific insights into consumer trust in the food system. As an indirect impact, the study supports the adoption and uptake of innovation in the food system. The Consumer Observatory, responsible for running the TrustTracker, aims to understand and analyse consumer behaviour and make that knowledge available to those who can use it. Consumer insights are crucial for new product success since understanding consumer needs and behaviour is vital for achieving commercial viability. With its uninterrupted stream of comparable data across time and space, the project can affect activities in the commercial sector and potentially also inform policies.

The study owes its success in large part to the good cooperation among partners working together in concerted action to develop the model and questionnaire, organise fieldwork, and collect and analyse data. Close collaboration with experienced academic partners also facilitated peer review and ultimately led to higher-quality data. Study partners have used research findings and data to write and publish scientific articles. In addition, many scholars outside the core partnership have expressed interest in the data, which illustrates the project's value from a scientific prespective.

Although it is possible to fund this type of research at the national level, in practice, funding is available only for short projects that do not support the collection of comparable data over years. EIT provided partners with the means to collect data across many European countries using a consistent methodology over a long period. EIT also supports the analysis and dissemination of data; the Consumer Observatory's knowledge management system grants users access to all consumer-based research and insights supported by EIT Food, including the flagship TrustTracker study.

Impact attribution

The indicator "# people taking part in EIT Food co-creation activities" measures the extent to which EIT Food engages consumers in shaping the food system, directly contributing to the overarching objective of increasing

[557] EIT Food. Quantitative Studies. https://www.eitfood.eu/projects/consumerobservatory/trusttracker; Eufic. (2018). EIT Food TrustTracker. https://www.eufic.org/en/european-projects/project/eit-food-trusttrackerr, Institute for Nutrition and Health. EIT Food TrustTracker® . https://research.reading.ac.uk/ifnh/cases/eit-food-trusttracker-3/, interview with the beneficiary.

public engagement in the food system. Co-creation activities aim to involve citizens in innovation processes, fostering trust and transparency in the food sector.

As shown in Table 113 above, both the 2024 and 2027 targets have already been exceeded, demonstrating strong performance in mobilising public participation through initiatives such as Consumer Engagement Labs, targeted interventions, and the TrustTracker. This progress is aligned with the objective of increasing public engagement and correlates with observed improvements in consumer trust indicators, such as rising confidence in food safety and authenticity between 2018 and 2024.

The attribution claim is direct for participation numbers, as these are entirely the result of EIT Food's programmes. However, the KPI's scope is limited as it measures the quantity of engagement, not its depth or whether participation leads to sustained behavioural change or systemic impact. Multiple factors, including national food safety policies, industry practices, and media narratives, influence wider improvements in consumer trust.

Table 114. Impact attribution "# people taking part in EIT Food co-creation activities"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# people taking part in EIT Food co-creation activities	This KPI measures the number of individuals engaged in EIT Food's co-creation activities, such as innovation design testing, targeted interventions, and TrustTracker initiatives. The logic assumes that these activities are fully driven by EIT Food's programmes and funding, which aim to increase consumer involvement and trust in the food system	**Direct attribution – input indicator** (participation is a direct result of EIT Food's initiatives)	**High** – Based on internal monitoring data aggregated from project-level reports and validated through EIT Food's KPI framework. Data is disaggregated by activity type and systematically collected and verified for completeness.	**Scope limitations:** The indicator measures participation numbers but does not assess the depth or quality of engagement, nor whether participation leads to sustained behavioural change or systemic impact. **External factors:** National food safety policies, industry practices, and media coverage may also influence broader improvements in consumer trust.

4.6.3.2 Increased adoption & uptake of innovation in the food system; Improved food safety & security

new digital solutions in use to improve supply chain efficiency, integrity and/or transparency

Digital solutions are part of both a necessary response to external pressures (climate, regulatory, shocks) and an opportunity for firms to become more efficient, sustainable, and competitive. Digitalisation is transforming EU food supply chains by increasing efficiency, transparency, and resilience. It supports improved food safety and security through a range of advanced technologies and systems that facilitate real-time monitoring, data integration, and intelligent decision-making.[558]

The EU food supply chain is an extensive and intricate network involving millions of stakeholders, from farmers to regulators.[559] Ensuring food safety, traceability, and operational efficiency is critical for protecting public health, advancing environmental sustainability and economic resilience, and facilitating seamless cross-border trade within the Single Market.[560] However, persistent challenges such as climate change, food fraud, logistical disruptions (e.g., the COVID-19 pandemic, geopolitical conflicts like the war in Ukraine), and evolving regulatory frameworks have highlighted vulnerabilities in conventional, analogue supply chains.[561]

Digital transformation offers a strategic pathway to modernise the EU food system. Technologies such as blockchain and QR codes enable robust, real-time tracking of products throughout the supply chain, enhancing recall capabilities and ensuring transparent verification of origin, production practices, and compliance with safety standards.[562] Advanced data analytics and AI-driven algorithms can proactively identify emerging risks, such as contamination and supply chain interruptions, thereby enabling early warning systems crucial to safeguarding food security.

Shared digital platforms support harmonised reporting and regulatory compliance (e.g., to EFSA, DG SANTE), enhancing transparency and evidence-based policymaking.[563] Embracing these digital enablers can strengthen regulatory oversight, drive the adoption of innovation, and foster a resilient, sustainable, and competitive European food system.

Digitalisation in food supply chains is explicitly supported under several EU strategies, such as Farm to Fork Strategy which promotes traceability and safe, sustainable food systems, Digital Europe Programme which funds infrastructure and AI development in the agri-food space, the EU Green Deal which emphasizes digital innovation to reduce carbon footprints and waste, and the Common Agricultural Policy (CAP) which provides digital training,

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[558] E.g. Rossi, S., Gemma, S., Borghini, F., Perini, M., Butini, S., Carullo, G., & Campiani, G. (2025). Agri-Food Traceability Today: Advancing Innovation towards Efficiency, Sustainability, Ethical Sourcing, and Safety in Food Supply Chains. Trends in Food Science & Technology, 105154.
[559] E.g. European Commission: Directorate-General for Health and Food Safety, TRACES – 2023 annual report, Publications Office of the European Union, 2024, https://data.europa.eu/doi/10.2875/231566.
[560] Charlebois S, Latif N, Ilahi I, Sarker B, Music J, Vezeau J. Digital Traceability in Agri-Food Supply Chains: A Comparative Analysis of OECD Member Countries. Foods. 2024 Apr 1;13(7):1075. doi: 10.3390/foods13071075. PMID: 38611378; PMCID: PMC11011367.
[561] E.g. Bertolozzi-Caredio, D., Severini, S., Pierre, G., Zinnanti, C., Rustom, R., Santoni, E. and Bubbico, A., Risks and vulnerabilities in the EU food supply chain, Publications Office of the European Union, Luxembourg, 2023, doi:10.2760/171825, JRC135290; Jagtap S, Trollman H, Trollman F, Garcia-Garcia G, Parra-López C, Duong L, Martindale W, Munekata PES, Lorenzo JM, Hdaifeh A, Hassoun A, Salonitis K, Afy-Shararah M. The Russia-Ukraine Conflict: Its Implications for the Global Food Supply Chains. Foods. 2022 Jul 14;11(14):2098. doi: 10.3390/foods11142098. PMID: 35885340; PMCID: PMC9318935.
[562] E. g. Mishra, N., Mistry, S., Choudhary, S., Kudu, S., & Mishra, R. (2020, June). Food traceability system using blockchain and QR code. In IC-BCT 2019: Proceedings of the international conference on blockchain technology (pp. 33-43). Singapore: Springer Singapore; Vasileiou, M., Kyrgiakos, L. S., Kleisiari, C., Lappas, P. Z., Tsinopoulos, C., Kleftodimos, G., .. & Vlontzos, G. (2025). Digital Transformation of Food Supply Chain Management Using Blockchain: A Systematic Literature Review Towards Food Safety and Traceability: M. Vasileiou et al. Business & Information Systems Engineering, 1-28.
[563] E.g. Kizililsoley, N., van Meer, F., Mutlu, O., Hoenderdaal, W. F., Hobé, R. G., Mu, W., .. & van der Velden, B. H. (2025). Food safety trends across Europe: insights from the 392-million-entry CompreHensive European Food Safety (CHEFS) database. arXiv preprint arXiv:2507.13802.

advisory, and technology funding to farmers. Digital solutions are central to modernising EU food supply chains. They help address key challenges such as food safety, climate change, consumer trust, and resilience. However, full-scale transformation will require further policy harmonisation, support for SMEs, and investment in digital infrastructure and skills.[564]

The intended impact of improving conditions for enhanced public trust through active participation in the food system, increasing the adoption and uptake of innovation, and improving food safety and security, is directly linked to **Strategic Objective 3: Build a consumer-centric connected food system across Europe.** The objective is designed to develop a digital food supply network with consumers and other ecosystem players as integrated partners to improve safety, real-time traceability, quality, and sustainability of ingredients.

This focus on digitalisation of supply chains between businesses and to consumers will lead to systemic improvements in food quality, safety, and a reduction in food fraud. These objectives are closely connected and cross-cutting with the co-creation activities discussed above, contribute to building consumer trust, driving innovation uptake, and ensuring that the evolving food system continues to reflect consumer needs and expectations.

In essence, EIT Food views Increased adoption & uptake of innovation in the food system as a direct result of building trust, particularly consumer trust, through transparency and digital solutions, coupled with robust support for entrepreneurship and innovation capacity.[565] It also corresponds strongly with UN SDG 2.4, which aims for sustainable food production systems and promotion of the adoption of resilient agricultural practices that increase productivity and output. These practices should help preserve ecosystems, enhance the capacity to adapt to climate change, extreme weather events, droughts, floods, and other disasters, and progressively improve land and soil quality by 2030.[566]

To achieve this, EIT Food has set specific targets for 2027, including the development of a fully integrated digital supply network and improvements in food system transparency and integrity (SO 3.1, 3.2).[567] Developing a digital food supply network that integrates consumers and other ecosystem players aims to improve real-time traceability, ingredient quality and sustainability, and food safety. This digitalisation of supply chains between businesses and consumers is expected to provide systemic improvements that will also facilitate the adoption of innovation.[568]

The following Table 115 provides an overview of the impacts achieved for KPI # new digital solutions in use to improve supply chain efficiency, integrity and/or transparency.

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[564] European Commission. Shaping Europe's digital future. Digitalising the EU agricultural sector. https://digital-strategy.ec.europa.eu/en/policies/digitalisation-agriculture; European Union. EU Agri-food Platform. Digital Europe Programme. https://transition-pathways.europa.eu/agri-food/financial-instruments/digital-europe-programme.
[565] EIT Food Business Plan 2023-2025.
[566] EIT Food Strategic Agenda 2021-2027.
[567] Ibid.
[568] EIT Food Business Plan 2023-2025.

Table 115. # new digital solutions in use to improve supply chain efficiency, integrity and/or transparency

Impact indicators	Targets	Impacts achieved
# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency	10 by 2024 20 by 2027	The indicator is calculated based on EIT Food's self-assessment of its marketed innovations, which fall into the category of improving supply chain efficiency, integrity, and/or transparency. The results of this self-assessment show that the achieved results already surpassed the targets set for 2024-2027.

2018	2019	2020	2021	2022	2023	2024
1	6	4	0	14	8	23[569]

Furthermore, the Trust Tracker reports show a slow but steady upward trend in consumer perceived food safety.[570]

At the same time, the partners' survey (conducted as part of the 7-year assessment of EIT Food) results reveal that most EIT Food partners perceive only limited contributions to improved food safety and security. Specifically, 46% (14) of respondents reported a weak or no impact from their activities in this domain, compared with 41% (10) who reported a medium to strong impact. Additionally, 12% stated that their activities were not related to food safety and security.[571]

From the perspective of EIT Food's role and its potential impact, trust also emerges as a critical enabler of innovation adoption, pointing out the cross-cutting relevance of this strategic objective. Consumers who trust the food chain are far more receptive to innovation: 38% of high-trust consumers are open to adopting new products, compared to only 16% of those with low trust.[572]

[569] EIT Food Marketed innovations, internal material.
[570] EIT Food. The EIT Food Trust Report 2020. https://www.eitfood.eu/reports/trust-report-2020; https://www.eitfood.eu/reports/trust-report-2024.
[571] EIT. (2023). Seven-year comprehensive assessment report of EIT Food. https://www.eit.europa.eu/sites/default/files/2024-12/Seven-year%20comprehensive%20assessment%20report%20of%20EIT%20Food_0.pdf.
[572] EIT Food. Trust Report 2024. https://www.eitfood.eu/reports/trust-report-2024.

- **Impact highlight**

Holloid's AI-powered holographic detectors ("Hollometers") are transforming water safety monitoring by enabling real-time detection of pathogens, micro-algae, and microplastics in under a minute.

EIT Food supported Holloid's development through its Seedbed and Food Accelerator Network programmes. With this backing, Holloid has begun pilot trials and secured its first customers in four European countries.

> *The support that EIT Food has provided us has helped us gain our first customers faster, and by being more informed than if we had been on our own.*
>
> *Pinar Frank, Co-Founder and CPO of Holloid*

This innovation significantly reduces the risk of waterborne outbreaks, improving consumer health protection and reducing economic losses. Holloid's Hollometers could reduce bacteria-based outbreaks by 90%, depending on network coverage, sampling frequency, and the ability to isolate contaminants. Estimates suggest that major water suppliers using Hollometers could save EUR 360 000 to EUR 32 million annually in avoided medical treatment costs, prevent 11 to 972 hospitalisations, and avert 1 to 55 deaths each year by identifying and containing contamination early. For water utilities, the economic case is strong: by replacing slow, labour-intensive plating methods, each Hollometer can deliver net savings of around EUR 100 000 per year, typically paying for itself within 4–8 months.

The potential impact extends far beyond drinking water safety. Holloid's technology offers a scalable solution for pathogen and contaminant detection across food and beverage production, pharmaceuticals, cosmetics, renewable energy, and environmental monitoring. Enabling faster, more frequent, and cost-effective testing paves the way for safer, more sustainable, and more competitive industrial processes in Europe.[573]

Impact attribution

The indicator "# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency" measures EIT Food's contribution to accelerating the adoption of digital innovations that enhance traceability, efficiency, and trust in the food system. Hence, it contributes to the objectives of increasing innovation uptake and improving food safety and security.

By 2024, EIT Food reported 56 digital solutions in use, surpassing both the 2024 target of 10 and the 2027 target of 20, as reported in Table 115 above. This demonstrates strong portfolio-level progress and alignment with broader trends in the agri-food sector, where digitalisation is increasingly seen as a key enabler of transparency and resilience. However, evidence from the EIT Food partner survey suggests that the perceived contribution to food safety and security remains mixed: 46% of respondents reported weak or no impact, while 41% indicated a medium to strong impact. This indicates that while EIT Food-supported solutions are being deployed, their systemic influence on food safety and security is not yet widely recognised by stakeholders.

While EIT Food provided critical enablers of funding, technical support, and access to networks that all helped companies develop and deploy these digital solutions, their adoption and impact also depended on external factors, including regulatory frameworks, industry readiness, and consumer trust. Therefore, this KPI should be interpreted as evidence of EIT Food's contribution to digital innovation uptake, rather than full attribution, both

[573] EIT Food. Our impact. Holloid: protecting public health with AI-powered water monitoring. https://www.eitfood.eu/impact-stories/holloid-protecting-public-health-with-ai-powered-water-monitoring.

because external factors played a significant role and because survey results indicate that the perceived impact on food safety and security remains limited.

Table 116. Impact attribution “# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency	This indicator counts digital solutions supported by EIT Food that are now in use to improve supply chain efficiency, integrity, or transparency. The logic assumes that EIT Food’s involvement accelerated their development and deployment, but acknowledges that other factors, such as regulatory compliance, market demand, and industry investment, also contributed.	**Contribution** – EIT Food helped companies bring these solutions to market, but cannot claim full attribution.	**Moderate confidence** – Based on internal monitoring data and self-assessment by projects, complemented by evidence from the EIT Food partner survey (7-year assessment), which indicates mixed perceptions of impact. Data is validated internally for completeness, but relies on self-reporting and does not include independent verification of the adoption scale or long-term impact	**Scope limitations:** The indicator counts the number of solutions but does not measure their market penetration, user adoption rates, or measurable improvements in food safety and security. **External factors:** Broader improvements in supply chain transparency and safety depend on regulatory frameworks, industry readiness, and consumer trust. **Attribution complexity:** While EIT Food provided essential support, successful deployment also depends on the company's capabilities, the policy environment, and market conditions.

4.6.3.3 Reduction in relative risk (R) of obesity & Non-Communicable Disease (NCD) prevalence in target populations due to known dietary factors

EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe (targeting food groups known to be major sources of these dietary factors); or products on the market with an improved nutritional profile

Food-Based Dietary Guidelines (FBDGs) translate nutritional science into practical, culturally relevant advice to reduce diet-related risks of obesity and non-communicable diseases (NCDs). Based on evidence from large epidemiological studies (e.g., the Global Burden of Disease,[574] the EPIC study,[575] and WHO/FAO evidence reviews), they promote healthier eating patterns to improve diet quality, prevent chronic disease, and support population well-being.[576]

To be effective, FBDGs must be tailored to the specific cultural, economic, and dietary contexts of a given country or region. They should also be consistent, actionable, and memorable for a broad public uptake and implementation.[577] In 2010, the European Food Safety Authority (EFSA) issued a Scientific Opinion on establishing FBDGs in Europe, outlining how they should be developed, for example, by taking into account diverse populations and methodologies. The EU's Health Promotion Knowledge Gateway lays out definitions, methodology, and encourages consistency while recognising country-specific adaptations.[578]

Translating these recommendations into practice, however, depends not only on public awareness but also on the availability of foods that align with dietary guidance. This is where food innovation is important. Innovation (in terms of product formulation, new ingredient sources, processing methods) plays a significant role in making existing products healthier by reducing sugar, salt, saturated fats or replacing them with healthier alternatives (e.g. plant-based fats and fibres), creating new products that are healthier from the outset (e.g. with less sugar, healthier fats). Technology innovations such as alternative sweeteners, salt substitutes, fat substitutes, fermentation or plant proteins, and ensuring reformulated or new products are acceptable in terms of taste, texture, price, etc., so uptake is high.

These innovations help align with both public health policy goals and consumer demand and can help shift the food environment. In this way, FBDGs set the direction for healthier diets, while food innovation provides the practical means to make those diets achievable at scale.

EIT Food's strategy is closely aligned with public health objectives, particularly in combating obesity and reducing the prevalence of NCDs through improved dietary habits. A key focus of its approach is to directly reduce the levels of undesirable ingredients, such as "free sugars," salt, and unhealthy fats in food products, while simultaneously fostering the development and market uptake of products with an overall improved nutritional profile. This dual strategy aims to make healthier food choices more accessible and attractive to consumers, thus encouraging long-term dietary shifts.

Two of EIT Food's strategic objectives are particularly relevant in this context: Strategic Objective 2: Enabling healthier and more sustainable individual consumer choice, and Strategic Objective 3. Together, they address a fundamental challenge in shaping healthier diets: consumer choices are strongly influenced by both the range of product options available and by the information, perceptions, and motivations that guide decision-making. Without

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[574] IHME. Research and analysis. Global Burden of Disease (GBD) . https://www.healthdata.org/research-analysis/gbd.
[575] World Health Organization. International Agency for Research on Cancer. IARC logo EPIC-Europe study. https://epic.iarc.fr/.
[576] EFSA Panel on Dietetic Products, Nutrition, and Allergies (NDA). (2010). Scientific opinion on establishing food-based dietary guidelines. EFSA Journal, 8(3), 1460.
[577] Ibid.
[578] European Commission. Knowledge for policy. Health Promotion and Disease Prevention Knowledge Gateway. https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/topic/food-based-dietary-guidelines-europe_en?.

intervention, this interaction often results in unhealthy and unsustainable dietary patterns.[579] It also tackles UN SDG goals 3.4: Addressing the Food Contribution to Non-Communicable Disease (NCD) and 2.2: Tackling Childhood Obesity.[580]

EIT Food has set concrete impact targets in line with this strategy. By 2025, it aims to have at least 12 EIT Food-supported products on the market that meet or exceed the recommended Food-Based Dietary Guidelines for Europe in terms of reduced levels of salt, free sugars, and/or trans and saturated fats. This number is expected to rise to 20 products by 2027. The intended societal impact of these is a measurable reduction in the relative risk (R) of obesity and NCD prevalence in the targeted populations, achieved by addressing key dietary risk factors.[581]

The following Table 117 provides an overview of the impacts achieved for KPI # EIT Food supported products on the market with levels of salt &/or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe.

[579] EIT Food Strategic Agenda 2021-2027.
[580] Ibid.
[581] EIT Food Business Plan 2023-2025.

Table 117. # EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe

Impact indicators	Targets	Impacts achieved
# EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe (targeting food groups known to be major sources of these dietary factors); or products on the market with an improved nutritional profile	12 by 2024 20 by 2027	The indicator is calculated based on EIT Food's self-assessment of its marketed innovations, which fall into the category of improved nutritional profile/levels of salt and/or free sugars, and/or trans and saturated fats reduced to, or below, the recommended Food-Based Dietary Guidelines for Europe. The results of this self-assessment show that the achieved results already surpassed the targets set for 2024-2027.

2018	2019	2020	2021	2022	2023	2024
4	5	1	0	8	8	17[582]

Dietary risks remain a major contributor to the burden of NCDs in the EU. In 2019, over 800 000 deaths and 14 million disability-adjusted life years (DALYs) were attributable to unhealthy diets.[583] Despite some progress in reducing premature mortality from NCDs, one in six people in the WHO European Region still dies before the age of 70 due to cardiovascular diseases, cancer, diabetes, or chronic respiratory diseases.

Obesity is a key driver of this burden. A high body mass index (BMI) is now one of the leading risk factors for disability and, in some Member States, may soon surpass smoking as the primary preventable risk factor for cancer. The prevalence of obesity in the Region has been steadily rising for decades. By 2020, nearly one in four adults in the EU was obese, and WHO data indicate a marked increase of over 20% in obesity prevalence between 2006 (18,8%) and 2022 (22,6%).[584]

These trends show little sign of improvement. Healthy life years[585] at birth have remained largely unchanged across the EU in recent years, with an overall decline observed between 2018 and 2023, as shown below.

2018	2019	2020	2021	2022	2023
64,0	64,6	64,0	63,6	63,6	63,1[586]

[582] EIT Food Marketed innovations, internal material.
[583] European Commission. Knowledge for policy. Health Promotion and Disease Prevention Knowledge Gateway. https://knowledge4policy.ec.europa.eu/health-promotion-knowledge-gateway/eu-burden-non-communicable-diseases-key-risk-factors_en.
[584] World Health Organization. Reports. European health report 2024: keeping health high on the agenda. https://www.who.int/europe/publications/i/item/WHO-EURO-2025-10668-50440-76183.
[585] EIT Business Plan 2025-2027 mentions that the impact of reduction in relative risk of obesity and NCD prevalence in target populations due to known contributory factors will be measured in Health Adjusted Life Years.
[586] Eurostat. Healthy life years by sex (from 2004 onwards). https://ec.europa.eu/eurostat/databrowser/view/hlth_hlye/default/table?lang=en.

- **Impact highlight**

Salus Optima is a digital health innovation aimed at addressing the growing burden of obesity and diet-related NCDs in Europe. The solution consists of a mobile application that integrates wearable and Continuous Glucose Monitor data with workplace canteen menu systems, providing personalised dietary and lifestyle recommendations to employees. The initiative targets improved dietary choices, the development of healthier habits, and, ultimately, the prevention of obesity-related conditions, which currently impose an estimated EUR 70 billion annual cost on EU healthcare systems.

In 2022, Salus Optima received EUR 30 000 through the first EIT Food Prize-Based Challenge on Personalised Nutrition for All for integrating real-time metabolic, behavioural, and lifestyle monitoring into a personalised nutrition service. EIT Food later accelerated its market launch with a EUR 375 011 grant, delivered in partnership with a major food service provider and the University of Bath's CNEM, over a 15-month project.

Pilot trials with over 100 employees of a global food service provider assessed habit formation, weight loss progress, metabolic responses, and user satisfaction. The app is forecasted to reach 1 050 000 users in three countries by 2029, with further potential for expansion.

Preliminary findings indicate positive behavioural and metabolic outcomes among participants, suggesting potential for long-term health benefits. According to an independent impact assessment, Salus Optima could generate an estimated EUR 1,27 billion in health benefits between 2025 and 2042, including reduced medical and care costs as well as indirect productivity gains from lower absenteeism.

> *With the potential reach of the food being serviced via corporate canteens, Salus Optima estimates an impact on approximately 1 million lives by 2029, projecting savings of EUR 494 million on obesity treatment and workplace absenteeism, with a substantial return on the EIT Food grant investment.*
>
> *Rodrigo Jesus, CEO of Salus Optima*

Beyond individual health outcomes, Salus Optima has implications for workplace health strategies. Employers may use data insights from the app to adapt canteen menus to better align with employees' health needs, potentially contributing to improved workforce wellbeing and reduced productivity losses. The approach also reflects the increasing demand among employees for accessible, affordable health-focused food options.[587]

Impact attribution

The indicator "# EIT Food supported products on the market with improved nutritional profiles" is designed to track EIT Food's contribution to reducing the relative risk (R) of obesity and NCD prevalence in target populations through known dietary factors. The logic is that by supporting the development and market introduction of products with reduced levels of salt, sugars, and unhealthy fats (or otherwise improved nutritional quality) EIT Food helps create healthier food environments that can influence dietary behaviours over time.

The reported figures in Table 117 above show that EIT Food has already surpassed its targets, indicating strong portfolio-level progress. This aligns with EU health priorities, given that dietary risks remain a leading cause of NCDs and obesity rates continue to rise across Europe. However, the persistence of high obesity prevalence and

[587] EIT Food. Our impact. Salus Optima: personalising canteen menus for improved employee health. https://www.eitfood.eu/impact-stories/salus-optima-personalising-canteen-menus-for-improved-employee-health.

stagnant healthy life years suggests that these product-level innovations, while important, have not yet translated into measurable population-level health improvements.

While EIT Food provided critical enablers of funding, technical support, and access to networks, which helped companies develop and market these healthier products, broader health outcomes depend on multiple factors, including national nutrition policies, consumer behaviour, and industry-wide reformulation trends. Therefore, this indicator should be interpreted as evidence of EIT Food's contribution to improving the nutritional quality of food products, rather than as a driver of reductions in obesity or NCD prevalence.

Table 118. Impact attribution "# EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe (targeting food groups known to be major sources of these dietary factors); or products on the market with an improved nutritional profile	This indicator counts products supported by EIT Food that meet EU dietary guidelines for salt, sugars, and fats or otherwise improve nutritional quality. The logic assumes that EIT Food's involvement accelerated their development and market entry, but acknowledges that other factors, such as regulatory frameworks, consumer demand, and industry reformulation initiatives, also contributed.	**Contribution** – EIT Food helped companies bring these products to market, but cannot claim full attribution.	**Moderate** – Based on internal monitoring data and self-assessment by projects, validated through EIT Food's KPI framework. Data is systematically collected but relies on self-reporting and does not include independent verification of market share, consumer uptake, or health impact.	**Scope limitations:** The KPI counts the number of products but does not measure their market penetration, consumer adoption, or actual impact on dietary risk factors. **External factors:** Broader reductions in obesity and NCD prevalence depend on national health policies, consumer behaviour, and industry-wide reformulation trends. **Attribution complexity:** While EIT Food provided essential support, health outcomes are influenced by multiple actors and systemic factors beyond the KIC's control.

4.6.3.4 Products on the market derived from alternative sources

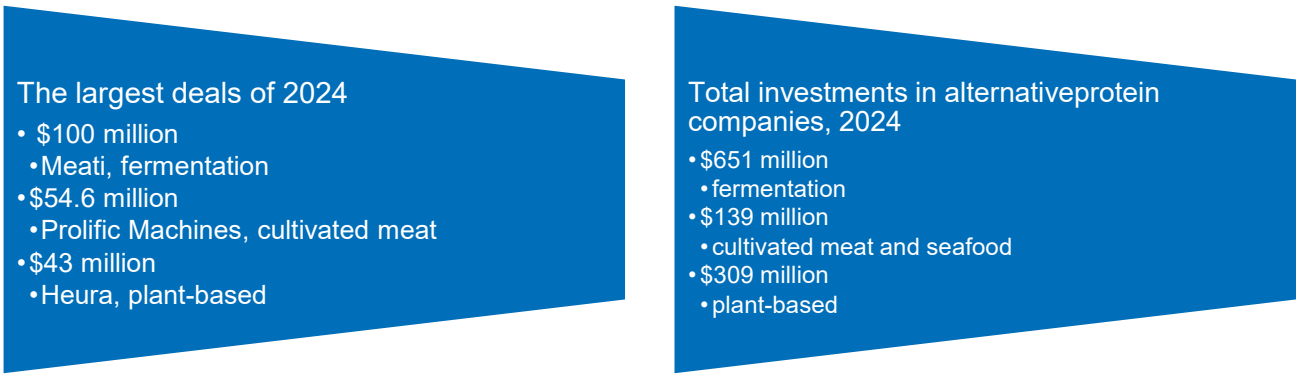
EIT Food supported products on the market derived from alternative sources (e.g., alternative proteins; new plant varieties; alternative production techniques, etc.)

Products on the market derived from alternative sources encompass a fast-growing category of innovations reshaping the food system. Alternative proteins, such as plant-based meat analogues, insect flours, and fermentation-derived dairy proteins, serve as substitutes for conventional animal products while addressing sustainability and health concerns.

New plant varieties, developed through advanced genomic techniques, aim to improve nutrition, resilience, and resource efficiency, though their market uptake in Europe is still shaped by evolving regulation. Alternative production techniques, including vertical farming, 3D food printing, and precision fermentation, offer new ways of producing food with greater control, customisation, and reduced environmental impact.[588] Circular economy considerations, using by-products or waste streams, are the factors that make alternative-source products more likely to be developed and adopted.[589]

There is growing consumer demand for products derived from alternative proteins, driven by interest in taste, health, nutrition, and sustainability. Surveys and market analyses show that consumers increasingly view plant-based, fermentation-derived, and cultivated proteins as viable options to diversify diets and reduce environmental impact. Beyond consumer trends, alternative proteins are also recognised as a key climate solution. The World Bank's Recipe for a Livable Planet analysis ranked the shift toward alternative proteins as the second most effective technical mitigation pathway globally, with the potential to reduce 6,1 $GtCO_2eq$ per year.[590] This dual significance, consumer-driven adoption and climate relevance, has attracted substantial investment. Figure 63 shows that capital flows into the alternative protein sector have been considerable, showcasing its role as a rapidly expanding part of the global food market.

Figure 63. Alternative proteins – 2024 by the numbers



Source: Ecorys, based on Good Food Institute 2024[591]

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[588] Liu, Y., Aimutis, W. R., & Drake, M. (2024). Dairy, plant, and novel proteins: Scientific and technological aspects. Foods, 13(7), 1010; https://www.consilium.europa.eu/en/policies/new-genomic-techniques-for-plant-breeding/; Gurung, L., Rawal, J. S., Puspa, R. C., Joshi, G. R., & Mandal, A. (2024). Vertical farming in urban agriculture: Opportunities, challenges, and future directions. Big Data Agric, 6, 89-95.
[589] E.g. in the case of alternatively sourced proteins, Hadidi, M., Aghababaei, F., Gonzalez-Serrano, D. J., Goksen, G., Trif, M., McClements, D. J., & Moreno, A. (2024). Plant-based proteins from agro-industrial waste and by-products: Towards a more circular economy. International journal of biological macromolecules, 261, 129576.
[590] Sutton, W., Lotsch, A., & Prasann, A. (2024). Recipe for a livable planet: achieving net zero emissions in the agrifood system. World Bank Publications.
[591] The Good Food Institute. (2024). 2024 State of alternative proteins report. https://gfi.org/wp-content/uploads/2025/04/2024-state-of-alternative-proteins-report.pdf.

While there is promising innovation, there are also obstacles, such as regulatory barriers facing the safety assessment of novel foods, which can slow down the time to market. Consumer acceptance, such as taste, texture, price, and trust, is also considered to be a major hurdle. Many startups lack their own production capacity in scale and manufacturing infrastructure (until scale is achieved, alt proteins and 3D-printed food can be more expensive than conventional equivalents).

EIT Food's activities in developing products derived from alternative sources are strongly aligned with Strategic Objective 4: Enhance sustainability through resource stewardship. This strategic objective seeks to accelerate the transformation of the agri-food system from a traditional linear "produce-use-dispose" model to a circular bioeconomy, thereby improving the environmental sustainability of food production and consumption.

The core rationale for promoting products from alternative sources is to reduce the agri-food system's environmental footprint, directly contributing to the EU Green Deal and Common Agricultural Policy targets. These include improving water quality and efficiency, reducing the use of chemical pesticides and antimicrobials, preventing nutrient loss, and protecting biodiversity.

Encouraging alternative production methods and sourcing aims to decouple economic growth in the food sector from the consumption of finite natural resources, minimising waste and energy use while creating added value from previously untapped resources.[592] As such, this objective responds to the growing demand for nutritional ingredients and energy sources, such as major macro- and micro-nutrients, including carbohydrates, derived from environmentally sustainable production methods.[593]

To achieve this, the KIC promotes the development and adoption of innovative technologies and processes, including biofortification, precision agriculture, and sustainable intensification.[594] Products in this category include alternative proteins, new plant varieties with improved resource efficiency and resilience, and innovative production techniques that use by-products or reduce processing waste. These innovations are designed to reduce pressure on land, water, and ecosystems and support consumer adoption of more sustainable dietary choices.[595]

The following Table 119 provides an overview of the impacts achieved for KPI # EIT Food supported products on the market derived from alternative sources.

[592] EIT Food Strategic Agenda 2021-2027.
[593] EIT. (2023). Seven-year comprehensive assessment report of EIT Food. https://www.eit.europa.eu/sites/default/files/2024-12/Seven-year%20comprehensive%20assessment%20report%20of%20EIT%20Food_0.pdf.
[594] Ibid.
[595] EIT Food Strategic Agenda 2021-2027.

Table 119. # EIT Food supported products on the market derived from alternative sources

Impact indicators	Targets	Impacts achieved
# EIT Food supported products on the market derived from alternative sources (e.g., alternative proteins; new plant varieties; alternative production techniques, etc.)	15 by 2024 40 by 2027	The indicator is calculated based on the self-assessment of EIT Food's marketed innovations, which fit into the products on the market derived from alternative sources. The results of this self-assessment show that the achieved results already surpassed the targets set for 2024-2027 (42 in total).

2018	2019	2020	2021	2022	2023	2024
1	4	3	0	7	7	18[596]

The partners' survey from the 7-year EIT Food assessment shows limited engagement in activities related to products derived from alternative sources. 36% of respondents reported a strong to medium impact (6,8), while 33% indicated weak or no impact (8,5). Additionally, 12 respondents stated their activities were not linked to this area.[597]

This should be viewed in the broader market and policy context. Alternative sources, particularly alternative proteins, represent a rapidly growing sector. In 2020, total alternative proteins (including plant-based) accounted for about 13 million metric tonnes, approximately 2% of the animal protein market. The exact contribution from algae, insects, microbial fermentation products, and cultured meat to this total remains a small fraction.

Alternative proteins are estimated to account for 11% of the global food protein market by 2035, with the potential to reach 22%. Europe and North America are considered the most mature markets for these alternatives, while Asia-Pacific is projected to have the biggest growth potential. Europe could see a substantial increase, reaching 15 million metric tonnes by 2035 (22% of the market) or even 33 million metric tonnes (34%) in an optimistic scenario where 'peak meat' consumption is reached.

Non-plant alternative proteins are increasingly seen as potential substitutes for animal-based products in both food and feed applications, offering an opportunity to contribute to the overall protein balance. This interest is fueled by concerns over the environmental impact of conventional animal production, geopolitical pressures highlighting import dependencies (e.g., for feed protein), and the EU's 'feed protein deficit'.[598]

Controlled-Environment Agriculture (CEA), including vertical farming and greenhouse systems, is gaining traction across the EU. These systems can significantly boost year-round local production of diverse, nutritious crops, enhancing food security and reducing dependence on imports. However, they

[596] EIT Food Marketed innovations, internal material.
[597] EIT. (2023). Seven-year comprehensive assessment report of EIT Food. https://www.eit.europa.eu/sites/default/files/2024-12/Seven-year%20comprehensive%20assessment%20report%20of%20EIT%20Food_0.pdf.
[598] European Parliamentary Research Service (EPRS). (2024). Alternative protein sources for food and feed. European Parliament. https://www.europarl.europa.eu/RegData/etudes/STUD/2024/757806/EPRS_STU%282024%29757806_EN.pdf.

also highlight the need to address challenges such as energy consumption, skills shortages, and supply chain development.

The global CEA market was valued at USD 15,7 billion and is projected to reach USD 31,1 billion by 2027. Vertical farming, in particular, is experiencing rapid growth, with the market expected to reach USD 18,9 billion by 2026.

Public sector support in areas such as skills development, R&D, and evidence-based policymaking is considered essential to accelerate the growth of CEA, especially as demand for such systems continues to rise.[599]

In terms of other farming technologies, the judgment of the Court of Justice of the European Union (CJEU) has had a direct impact on the application of new plant breeding techniques, particularly the costs associated with using directed mutagenesis in plant breeding.[600]

To date, only three agricultural crops, two maize varieties and one potato variety, have been approved for cultivation in the EU, and this situation is unlikely to change in the near future.[601]

[599] EIT Food. (2023). Barriers & opportunities for controlled environment agriculture in North-West Europe, https://www.eitfood.eu/files/EIT_CEA_Report_HR_28Sept.pdf.
[600] C-528/16 - Confédération paysanne and Others, https://curia.europa.eu/juris/liste.jsf?num=C-528/16&language=EN
[601] Béné, C., Oosterveer, P., Lamotte, L., & Brouwer, I. D. (2025). Food systems and the climate crisis: A review of pathways for adaptation and mitigation. Applied Economic Perspectives and Policy, 47(1), 5–27. https://doi.org/10.1002/aepp.13084.

- **Impact highlight**

Plastic pollution remains a global challenge, with single-use plastics accounting for approximately 80% of marine waste and contributing significantly to greenhouse gas emissions. Notpla, a UK-based startup, is addressing this issue through regenerative packaging made from seaweed and plants. Founded in 2014, its mission is to offer a truly biodegradable alternative to conventional plastics. Unlike many alternatives, Notpla's materials break down naturally without leaving microplastics or harmful residues. Notpla joined EIT Food's RisingFoodStars programme in 2024. EIT Food has further strengthened its support by participating in Notpla's recent USD 25 million fundraising round through the AgrifoodInvest programme, alongside United Bankers, C3H by Tamasek Trust, the Schmidt Family Foundation, and Radical Impact.

This round not only validates our approach but also positions us to capitalise on the growing demand for truly plastic-free packaging solutions in global markets, especially as we look towards expansion into the US.

Rodrigo Garcia Gonzalez, Co-Founder and CEO of Notpla

Notpla has successfully replaced over 21,5 million single-use plastic items across Europe. Its product range includes seaweed-based takeaway containers used by Just Eat, as well as compostable packaging adopted at high-profile venues such as the O2 Arena, Tottenham Hotspur Stadium, and Aston Villa Football Club.

In 2023, Notpla achieved a significant regulatory milestone when the Dutch government recognised its coating as the only food packaging on the market to qualify as non-plastic under the EU Single-Use Plastics Directive (SUPD).

Each Notpla unit replacing conventional plastic requires up to 70% less carbon dioxide equivalent (CO_2-eq), resulting in an estimated 600 tonnes of CO_2 avoided and four tonnes of trees saved for every tonne of seaweed waste utilised.

Ambitiously still, Notpla aims to replace 100 million single-use plastic items annually, using just 0,066% of the ocean's surface for seaweed cultivation, far less than land-grown alternatives. The company also continues to build partnerships, advocate for regulatory change, and set sustainability benchmarks, including founding the Natural Polymers Group.[602]

Impact attribution

The indicator "# EIT Food supported products on the market derived from alternative sources" measures EIT Food's contribution to diversifying the food system by supporting innovations such as alternative proteins, new plant varieties, and novel production techniques. Hence, the indicator contributes directly to the objective of increasing the availability of sustainable alternatives in the food market.

By 2024, EIT Food reported 42 supported products on the market, surpassing both the 2024 target of 15 and the 2027 target of 40, as shown in Table 119 above. This demonstrates strong portfolio-level progress and alignment with global and EU trends, where alternative proteins and controlled-environment agriculture are gaining momentum. For example, alternative proteins are projected to account for 11% of the global protein market by 2035, with Europe expected to reach up to 22% in an optimistic scenario. Similarly, vertical farming and other controlled-environment systems are expanding rapidly, with support from both public and private investments.

[602] EIT Food. Our impact. Notpla: turning the tide on single-use plastic. https://www.eitfood.eu/impact-stories/notpla-turning-the-tide-on-single-use-plastic.

While these products were supported by EIT Food through funding, technical assistance, and network facilitation, their market success also depends on other factors such as private investment, regulatory frameworks, and consumer demand. Evidence from the EIT Food partner survey reinforces this interpretation: while 36% of respondents reported strong to medium impact from EIT Food in this area, 33% indicated weak or no impact, and some reported no involvement in alternative sources at all. Hence, this indicator should therefore be interpreted as evidence of EIT Food's contribution to accelerating innovation in alternative sources, aligned with broader sustainability and protein diversification goals.

Table 120. Impact attribution "# EIT Food supported products on the market derived from alternative sources"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# EIT Food supported products on the market derived from alternative sources (e.g., alternative proteins; new plant varieties; alternative production techniques, etc.)	This indicator counts products on the market that were supported by EIT Food through funding, technical assistance, or network facilitation. The logic assumes that EIT Food's involvement accelerated their development and market entry, but acknowledges that other factors, such as private investment, regulation, and consumer demand, also played a role.	**Contribution** – EIT Food helped companies bring these products to market, but cannot claim full attribution	**Moderate** – Based on internal monitoring data and self-assessment by projects, complemented by evidence from the EIT Food partner survey (7-year assessment). Data is validated internally for completeness but relies on self-reporting and does not include independent verification of market share or long-term adoption.	**Scope limitations:** The indicator counts the number of products but does not measure their market penetration, consumer acceptance, or sustainability impact. **External factors:** Market growth in alternative proteins and farming technologies is driven by global trends, regulatory frameworks, and private investment. **Attribution complexity:** While EIT Food provided essential support, product success also depends on the company's capabilities, the policy environment, and consumer behaviour.

4.6.3.5 Reduction in food waste & food loss; Improvement in food system contribution to outcomes under EU Circular Economy Monitoring Framework

new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams.

Outcomes under the EU Circular Economy Monitoring Framework include inter alia waste management, recycling, competitiveness & innovation.

According to the EU Circular Economy Monitoring Framework, key dimensions include waste management, secondary raw materials, competitiveness, and innovation. The EU has made notable progress, with increasing rates of recycling and reuse and growth in circular-economy sectors in terms of jobs and value added.[603]

Valorising food waste and side streams is a crucial lever in Europe's transition toward circularity, offering benefits for environmental sustainability, innovation, and economic competitiveness. EIT Food exemplifies this approach through concrete projects. For instance, the Waste2Plate initiative targets to produce 1 million servings per year by 2027 by transforming food side streams into nutritious products.[604]

However, while some EIT Food-supported innovations use side streams or reintegrated waste, the overall market penetration of these products varies. Many projects remain at pilot or prototype stages, with fewer having achieved widespread commercial scale.

The EU Circular Economy Monitoring Framework explicitly includes waste management, secondary raw materials, competitiveness, and innovation as interconnected pillars. EIT Food's work in revalorising food system side streams directly supports these pillars by increasing the use of secondary raw materials, enhancing waste management practices, and driving competitiveness through new business models and cost-saving innovations. This contributes to broader EU sustainability goals, such as those outlined in the European Green Deal and the Circular Economy Action Plan, by reducing resource consumption, lowering CO_2 emissions, and improving resource efficiency.

EIT Food actively advances the circular economy by reintegrating waste and side streams into valuable applications across the food and feed sectors. These efforts align with EU priorities to reduce waste, enhance resource efficiency, and boost competitiveness while fostering innovation and developing enabling infrastructures.

Reducing food waste and loss is a core part of EIT Food's Strategic Objective 4, which aims to launch 40 new products or processes by 2027 that utilise revalorised or reintegrated side and waste streams. This supports the EU's overarching goal of reducing food waste by creating value from what would otherwise be discarded.[605]

This strategic focus aligns closely with the SDGs, particularly SDG 12.3, which seeks to halve per capita global food waste at retail and consumer levels and reduce food losses along production and supply chains by 2030, and SDG 13, which emphasises reducing the food system's climate footprint.[606]

The following Table 121 provides an overview of the impacts achieved for KPI # new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams.

[603] European Environment Agency. https://www.eea.europa.eu/themes/waste/links-and-resources/eu-circular-economy-monitoring-framework.
[604] EIT Food. Waste2Plate. https://www.eitfood.eu/projects/waste2plate.
[605] EIT Food Strategic Agenda, 2023.
[606] United Nations. Goals. 12 Ensure sustainable consumption and production patterns.https://sdgs.un.org/goals/goal12.

Table 121. # new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams

Impact indicators	Targets	Impacts achieved
# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams. Outcomes under EU Circular Economy Monitoring Framework include inter alia waste management, recycling, competitiveness & innovation.	15 by 2024 40 by 2027	The indicator is calculated based on EIT Food's self-assessment of its marketed innovations, which fit into products launched with EIT Food support using revalorised &/or reintegrated food system side-streams and waste streams. The results of this self-assessment show that the achieved results already surpassed the targets set for 2024 (31 in total), and are on an upward trajectory to reach the intended impact by 2027. **2018: 0; 2019: 1; 2020: 3; 2021: 0; 2022: 11; 2023: 4; 2024: 12**[607] According to Eurostat data for the EU27, food waste levels between 2020 and 2022 remained stable, with no significant changes observed. The indicator, which measures the amount of food waste generated annually per capita, includes waste across the entire food value chain: from production and processing to retail, food services, and households. The data suggest that progress in reducing food waste during this period was limited. **2020: 128; 2021: 129; 2022: 129**[608]

[607] EIT Food Marketed innovations (internal material).
[608] Eurostat. Food waste.
https://ec.europa.eu/eurostat/databrowser/view/cei_pc035__custom_6033664/bookmark/table?lang=en&bookmarkId=d6178210-88f8-4b1a-9f27-f75f3dd98b94&highlight=EU27_2020.

- **Impact highlight**

Globally, food waste remains a major challenge, with 1,05 billion tonnes wasted in 2022, equivalent to 132 kilograms per person. The food service sector alone accounted for 28% of this waste, or 294 million tonnes. Orbisk, a pioneering organisation based in the Netherlands, is addressing the critical issue of food waste in professional kitchens.

Orbisk's solution centres on a smart camera system installed above waste bins, paired with a scale. This system automatically identifies the type and quantity of food discarded, the time of disposal, and the stage of the kitchen process. Founded in 2018, Orbisk's growth was significantly supported by its participation in EIT Food's RisingFoodStars programme in 2020 and 2022. EIT Food also provided a collaborative innovation grant, speaking opportunities at events such as the 'Future of Food' conference, and financial support. Orbisk attributes 6% of its current impact to EIT Food's involvement.

The support we received from EIT Food has improved our visibility, reputation, and public relations, while the financial support (loans & investments) helped us reach our commercial potential more quickly.

Olaf van der Veen, CEO of Orbisk

As of 2023, Orbisk operates in 41 countries and has prevented 737 520 kg of food waste from reaching landfills. This equates to savings of 5 300 metric tonnes of CO_2 emissions, 5,16 billion litres of water, and EUR 5 million in food value. The associated greenhouse gas reductions have resulted in indirect eco-cost savings of EUR 2,56 million, with EIT Food's contribution accounting for 318 metric tonnes of CO_2 avoided and EUR 153,600 in related eco-costs. Solutions provided by Orbisk further enable kitchens to optimise purchasing and production, reducing waste by up to 70%. Businesses using Orbisk's system can achieve annual savings of EUR 55,000 and increase profit margins by 2–8%.

Looking ahead, Orbisk plans a Series A funding round and global expansion, with new offices in North America and the Middle East/Asia, and aims to enhance its products and services and enter new markets such as cruise ships, healthcare, and passenger airlines.[609]

Impact attribution

The indicator "# new products or processes launched with EIT Food support using revalorised and/or reintegrated food system side-streams and waste streams" is designed to measure EIT Food's contribution to the reduction in food waste & food loss and improvement in food system contribution to outcomes under the EU Circular Economy Monitoring Framework. The logic is that by supporting innovations that valorise side streams and waste, EIT Food helps reduce resource loss and promotes circularity in the food system.

EIT Food's portfolio shows strong progress, with the number of supported products and processes already surpassing the 2024 target and trending toward the 2027 goal. This indicates that EIT Food is moving in line with EU priorities under the Circular Economy Action Plan and the European Green Deal, which emphasise waste reduction, resource efficiency, and innovation.

However, when compared to EU-level trends, the picture is more nuanced. Eurostat data show that food waste per capita in the EU remained virtually unchanged between 2020 and 2022 (128–129 kg), suggesting that systemic

[609] EIT Food. Orbisk: reducing food waste by 50% in the food service sector. https://www.eitfood.eu/impact-stories/orbisk-reducing-food-waste-by-up-to-50-in-the-food-service-sector.

progress in reducing food waste has been limited. This contrast highlights that while EIT Food-supported innovations are aligned with EU objectives and demonstrate tangible outputs at the project level, their impact on overall waste reduction remains modest, as it is influenced by many other factors such as regulatory frameworks, consumer behaviour, and industry-wide adoption. In other words, EIT Food is an important enabler, but only one part of a much larger puzzle.

Therefore, EIT Food provided critical enablers that helped companies develop and launch these circular solutions; however, broader outcomes, such as reducing food waste at scale, depend on multiple factors, including regulatory frameworks, consumer acceptance, and industry-wide adoption.

Table 122. Impact attribution "# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams.	This indicator counts products or processes supported by EIT Food that valorise food system side-streams or waste streams. The logic assumes that EIT Food's involvement accelerated their development and market entry, but acknowledges that other factors, such as regulatory incentives, consumer demand, and private investment, also contributed.	**Contribution** – EIT Food helped companies bring these circular solutions to market, but cannot claim full attribution	**Moderate –** Based on internal monitoring data and self-assessment by projects, validated through EIT Food's KPI framework. Data is systematically collected but relies on self-reporting and does not include independent verification of market penetration or actual waste reduction achieved.	**Scope limitations:** The indicator counts the number of products/processes but does not measure their scale, adoption rate, or actual impact on food waste reduction. **External factors:** Broader reductions in food waste depend on national waste policies, consumer behaviour, and industry-wide uptake of circular practices. **Attribution complexity:** While EIT Food provided essential support, achieving systemic circularity requires coordinated action across the value chain and enabling policy frameworks.

4.6.3.6 Improved efficiency and sustainability of food systems

EUR Social, Environmental & Economic Return on Investment per EUR 1 invested in EIT Food portfolio of activities ("Portfolio ROI")

The societal impact indicator of improved efficiency and sustainability of food systems is measured as the EUR Social, Environmental & Economic Return on Investment (ROI) per EUR 1 invested in EIT Food activities, capturing the broader value generated by the portfolio in driving the transition towards a circular and sustainable agri-food economy. The problem it addresses is the limited understanding and insufficient translation of this wider value into ambitious, impact-oriented investment programmes in Europe, particularly from non-EU sources.[610]

The indicator seeks to demonstrate how innovation in food systems delivers returns beyond financial profit, strengthening the case for large-scale investment in sustainable solutions. Encompassing **all six Strategic Objectives**, this KPI supports EIT Food's ambition to drive a systemic transition towards more resource-efficient, resilient, and sustainable agri-food systems by 2027.[611]

To date, two independent studies have been conducted and published, discussing the ROI of EIT Food programmes:

- Entrepreneurship ROI

"*Entrepreneurship Impact Report: An overview of EIT Food's investment in agrifoodtech startups*"[612] is an independent impact assessment commissioned by EIT Food to evaluate the impact of its investment in agrifoodtech startups. The central part of this assessment is the ROI.

To do so, an independent consultancy reviewed EIT Food's database of 549 participants across three entrepreneurship programmes:

- **Seedbed Incubator Programme** (SEED), which supports aspiring entrepreneurs and researchers who are looking for market-validated business propositions.
- **EIT Food Accelerator Network** (FAN) for successful agrifoodtech startups seeking tech validation and commercial acceleration.
- **RisingFoodStars** (RFS), which aims to help aspiring agrifood scale-ups successfully scale up their commercial capabilities.

Online surveys were used to capture beneficiaries' experiences, and the results were analysed to develop a bespoke economic impact model to calculate the combined ROI for EIT Food's EUR 28 million investment in these three programmes from 2018 to 2023. The figures are presented in today's terms as a Net Present Value (NPV) with appraisal periods of 10, 12, and 15 years from the start of the programme in 2018 and a discount rate of 3,5%, as presented in the Table 123 below.

[610] EIT Food Strategic Agenda 2021-2027.
[611] Ibid.
[612] EIT Food. (2024). Entrepreneurship impact report: Return on investment for EIT Food's support of agrifood tech startups 2018–2023. https://www.eitfood.eu/reports/entrepreneurship-impact-report.

Table 123. ROI of three EIT Food entrepreneurship programmes in 10, 12 and 15 years

Category	NPV - 10 yrs (EUR)	NPV - 12 yrs (EUR)	NPV - 15 yrs (EUR)
Total Impacts			
SEED	14 493 443	29 022 050	32 317 521
FAN	86 657 539	186 155 657	208 829 625
RFS	44 177 350	88 686 683	98 767 163
Total	145 328 331	303 864 390	339 914 310
Programme Costs			
Direct Costs	25 187 295	25 187 295	25 187 295
Return on Investment			
Total	6	12	13

Source: EIT Food, Entrepreneurship Impact Report: An overview of EIT Food's investment in agrifoodtech startups[613]

The study shows that the EIT Food's investment in its three entrepreneurship programmes is projected to produce a 10-year ROI of 6 EUR for every 1 EUR invested by EIT Food per programme. This ROI is expected to grow to 13 EUR over 15 years.

- Innovation ROI

"*Innovation Impact Report: An initial benchmark of EIT Food's contribution to creating benefits with a focus on climate change and healthcare cost mitigation*"[614] is an independent impact assessment that employs a different methodology and focuses only on innovation projects. It included an impact assessment of the carbon dioxide equivalent (CO2-eq) and health benefits from EIT Food's portfolio.[615]

EIT Food provided a consulting company with a database of 108 innovation projects likely to have reached beneficiaries. An initial screening identified around 30 promising projects based on available outcome data, including market launches and potential health or carbon impacts. Short summaries were created using project management and monitoring data. Projects with discontinued activities or limited outcomes were excluded. As the initial shortlist did not yield enough suitable case studies, a second review expanded the scope to include startups and newer projects. Ultimately, 27 additional projects were identified, 16 were interviewed, and 6 were selected for full impact case studies (5 innovation projects and 1 startup; one of the case studies originates from the EIT Food startup programmes and is therefore excluded from the Innovation Programme totals):[616]

- SustainFEED.[617]
- Salus Optima Personalised Menus.[618]
- Ullmanna AI Weeder.[619]

[613] Ibid.
[614] EIT Food. (2024). Entrepreneurship impact report: Return on investment for EIT Food's support of agrifood tech startups 2018–2023. https://www.eitfood.eu/reports/entrepreneurship-impact-report.
[615] https://www.eit.europa.eu/news-events/news/eit-food-eur-1-investment-agri-food-innovation-generates-eur-2150-return-over-15.
[616] EIT Food. (2024). Innovation impact report: Measuring the return on investment of innovation activities in agrifood. https://www.eitfood.eu/reports/innovation-impact-report.
[617] Project addresses aquaculture sustainability by exploring alternative fish feed ingredients with lower environmental impact. It uses microalgae to enrich artemia for feeding Seabass and Seabream larvae at the hatchery stage.
[618] Introduced as an Impact highlight in the section above.
[619] Project promotes sustainable farming through AI-powered mechanical weeding. Ullmanna's AROW system uses high-resolution imaging and proprietary software to identify weeds with precision. The NEWMAN brand combines AROW with customer machinery.

- UnderPRESSURE.[620]
- Scaling the Bump Cap: Mimica.[621]

The assessment combined desk research with consultations involving project beneficiaries. Where relevant, project leads were contacted to gather insights on development and impact. For responsive projects showing progress, potential CO_2-eq, health, and economic benefits were assessed and presented separately.[622]

- Carbon impacts were monetised using UK Government carbon credit values, based on Life Cycle Analyses (LCA) commissioned by project leads and DESNZ/IPCC modelling.
- Health benefits were estimated using the UK Calorie Model or peer-reviewed literature, focusing on healthcare costs, productivity, and QALYs.
- Market benefits and healthcare savings from reduced interventions were also considered.
- The level of attribution of benefits to EIT Food was estimated by the project consultees, who were asked to quantify how much of any current or future benefits were directly caused by EIT Food's support.

A bespoke economic model consolidated results, with transparent assumptions per case study. All figures provided are presented as NPV over 10, 12, or 15 years from 2018, using a 3,5% discount rate (as in the previous study; 1,5% for health benefits, per UK Treasury Green Book). The ROI analysis is presented in two components. The first assesses ROI based on innovation case studies in relation to individual project costs.

The second estimates ROI for the broader EIT Food Innovation Programme by extrapolating the case study findings to the programme level.[623] Hence, the report provides separate analyses for the case studies and the programme. For the five case studies, the model estimates EUR 52 million in impacts at the European level over 10 years, rising to EUR 725 million over 15 years. These are split into health (EUR 392 million), carbon (EUR 204 million), and market benefits (EUR 130 million), as presented in Table 124. Most health impacts stem from the Salus project, which is expected to reach 1 million users and grow 5% annually, promoting healthier eating habits. Mimica contributes the largest share of carbon benefits (EUR 98 million), assuming a 50% reduction in meat waste and one-third market share.

Table 124. ROI: 5 case studies

Return on Investment: 5 case studies			
	10 yrs	12 yrs	15 yrs
Total	0,6	2,5	8,6
	Net Benefits 5 Case Studies		
Carbon Benefits	5 729 102	44 267 395	203 996 154
Health Benefits	28 338 141	117 076 945	392 105 803
Market Benefits	18 251 635	52 503 412	129 727 287
Total	**52 318 879**	**213 847 753**	**725 829 245**

Source: EIT Food, Innovation impact report: Measuring the return on investment of innovation activities in agrifood

[620] Project developed an ultra-high-pressure homogenisation (UHPH) unit for high-viscosity products as an alternative to pasteurisation or UHT. It enables the treatment of e.g. sauces and patisserie ingredients without steam, reducing fossil fuel use while preserving taste and extending shelf life.
[621] A temperature-sensitive indicator originally designed to help visually impaired users detect food freshness by touch. It now supports broader efforts to reduce food waste from conservative expiry dates.
[622] EIT Food. (2024). Innovation impact report: Measuring the return on investment of innovation activities in agrifood. https://www.eitfood.eu/reports/innovation-impact-report.
[623] Ibid.

To estimate programme-wide impact, the study applied a conservative grossing-up coefficient of 2,5 to the five selected case studies.[624] Case study selection was based on validated 'marketed innovation' KPIs, potential for impact, and availability of contact details. However, limited data access, particularly for older projects, suggests some impacts may have been missed.

The grossed-up analysis indicates total projected impacts of EUR 1,8 billion, with ROI ranging from 1,6 at 10 years to 21,5 at 15 years, as presented in Table 125 below. Yet, the reports suggest that these figures are indicative and should be treated as benchmarks, subject to refinement.[625]

Table 125. ROI: Whole programme

.Return on Investment Whole Programme			
	10 yrs	**12 yrs**	**15 yrs**
Direct costs	84 335 291	84 335 291	84 335 291
Net Benefits Whole Programme (EUR)			
Carbon Benefits	14 322 755	110 668 489	509 990 386
Health Benefits	70 845 353	292 692 364	980 264 507
Market Benefits	45 629 089	131 258 529	324 318 219
Total	130 797 197	534 619 381	1 814 573 112
Return on Investment Whole Programme			
Total	1,6	6,3	21,5

Source: EIT Food, Innovation impact report: Measuring the return on investment of innovation activities in agrifood

The additional, last report on the ROI of educational activities had not yet been published at the time of drafting this report.[626]

The following Table 126 provides an overview of the impacts achieved for KPI EUR Social, Environmental & Economic Return on Investment per 1 EUR invested in EIT Food portfolio of activities (“Portfolio ROI”).

[624] Importantly, the report notes, that this approach reflects consultants’ professional judgement and experience, acknowledging selection bias towards higher-impact projects and the likelihood of additional, unquantified impacts.
[625] EIT Food. (2024). Innovation impact report: Measuring the return on investment of innovation activities in agrifood. https://www.eitfood.eu/reports/innovation-impact-report.
[626] Communication with the EIT Food.

Table 126. EUR Social, Environmental & Economic Return on Investment per 1EUR invested in EIT Food portfolio of activities ("Portfolio ROI")

Impact indicators	Targets	Impacts achieved
EUR Social, Environmental & Economic Return on Investment per 1EUR invested in EIT Food portfolio of activities ("Portfolio ROI").	Portfolio ROI>/=1 by 2024 Portfolio ROI>/=2 by 2027[627]	Two independent impact assessments were commissioned in 2024. The Entrepreneurship Impact Report[628] evaluated EIT Food's investment in agrifoodtech startups supported by Seedbed, FAN, and RFS programmes since 2018. Using 10-, 12-, and 15-year appraisal periods, it estimated an ROI of EUR 6 per EUR 1 invested over 10 years, rising to EUR 13 over 15 years, with total impacts of EUR 145,3 million and EUR 339,9 million, respectively. The Innovation Impact Report[629] focused on projects funded from 2018, assessing climate and health impacts. Based on five case studies, ROI reached EUR 8,6 per EUR 1 invested over 15 years. When grossed up to programme level, total impacts rose to EUR 1,8 billion, with ROI ranging from 1,6 at 10 years to 21,5 at 15 years. The above numbers are estimated as forecasts and should be treated as benchmarks until more data becomes available. However, the studies show that the targets included in the Strategic Agenda have already been achieved and exceeded.

The Entrepreneurship Impact ROI		
10 yrs	**12 yrs**	**15 yrs**
6	12	13
Innovation Impact ROI		
10 yrs	**12 yrs**	**15 yrs**
1,6	6,3	21,5

[627] EIT Food Strategic Agenda 2021-2027.
[628] EIT Food. (2024). Entrepreneurship impact report: Return on investment for EIT Food's support of agrifood tech startups 2018–2023. https://www.eitfood.eu/reports/entrepreneurship-impact-report
[629] EIT Food. (2024). Innovation impact report: Measuring the return on investment of innovation activities in agrifood. https://www.eitfood.eu/reports/innovation-impact-report.

Impact attribution

The indicator “Portfolio ROI” measures the broader social, environmental, and economic value generated for every euro invested in EIT Food’s portfolio of activities. It is designed to demonstrate how innovation in food systems delivers returns beyond financial profit, supporting the overarching objective of improving food systems' efficiency and sustainability. By quantifying benefits such as carbon reduction, health improvements, and market impacts, this KPI strengthens the case for large-scale investment in sustainable agri-food solutions.

Independent impact assessments commissioned by EIT Food indicate that the portfolio has already exceeded its targets, with ROI estimates ranging from EUR 6 per EUR 1 invested over 10 years for entrepreneurship programmes to EUR 21,5 per EUR 1 invested over 15 years for innovation activities. These findings suggest that EIT Food-supported initiatives are generating significant long-term value across multiple dimensions.

However, these figures should be interpreted with caution. They are based on forecast models and assumptions, not realised returns, and rely on self-reported data complemented by case studies. While EIT Food provided critical enablers, the actual impacts also depend on external factors such as market dynamics, regulatory frameworks, and consumer adoption. Therefore, this indicator should be seen as evidence of EIT Food’s contribution to creating systemic value, rather than a precise measure of attributable impact.

Table 127. Impact attribution “EUR Social, Environmental & Economic Return on Investment per EUR 1 invested in EIT Food portfolio of activities (“Portfolio ROI”)”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
EUR Social, Environmental & Economic Return on Investment per EUR 1 invested in EIT Food portfolio of activities (“Portfolio ROI”).	This indicator estimates the combined social, environmental, and economic benefits generated by EIT Food’s portfolio relative to its investment. The logic assumes that EIT Food’s interventions were critical in enabling these benefits, but acknowledges that other factors, such as market conditions, policy frameworks, and private investment, also contributed.	**Contribution** – EIT Food played a key enabling role, but full attribution is not possible	**Moderate** – Based on two independent impact assessments using economic modelling and case studies. Data sources include internal monitoring, surveys, and interviews with beneficiaries. While methodologies are transparent, results are forecasts and rely on assumptions, making them indicative rather than definitive.	**Scope limitations:** ROI estimates are projections, not realised returns, and do not capture all externalities or long-term systemic effects. **External factors:** Market trends, regulatory changes, and consumer behaviour strongly influence actual outcomes. **Attribution complexity:** While EIT Food provided essential support, benefits also depend on co-investment, company performance, and broader ecosystem dynamics.

4.7 EIT Manufacturing

EIT Manufacturing is a community that brings together industry, research, and education to strengthen the resilience and competitiveness of manufacturing in Europe. Guided by its purpose of improving people's lives through sustainable manufacturing, EIT Manufacturing works toward the vision of becoming the leading European innovation network in this field. Its mission focuses on connecting stakeholders, fostering talent, and supporting entrepreneurship to accelerate sustainable innovation.

The recent revision of its Strategic Agenda reflects lessons learned from external shocks such as the COVID-19 pandemic, global supply chain disruptions, and the war in Ukraine, underlining the importance of enhancing the sustainability and adaptability of European industry. The strategic objectives of the KIC are as follows:

- **Put people at the centre of manufacturing** – Europe needs a highly skilled and adaptable workforce for jobs transformed by digitalisation and other market shifts. EIT Manufacturing supports this by promoting new, attractive industry jobs, leading initiatives such as Skills.move, the Deep Tech Talent Initiative, and strengthening the innovation capacity of higher education institutions.
- **Accelerate green manufacturing** - European manufacturing must reduce its environmental impact and transition to circular practices. EIT Manufacturing supports industry in reducing emissions, pollution, and resource use, while contributing to the European Green Deal, the Net-Zero Industry Act, and other initiatives.
- **Foster sovereignty and competitiveness** - to remain globally competitive, Europe needs both disruptive and incremental innovation. EIT Manufacturing helps strengthen resilience, agility, and flexibility across established companies, SMEs, and start-ups. It also enhances innovation capacity in EIT RIS countries, supporting cohesion and attracting industrial investment in a changing global landscape.

This mission is intended to be executed through three main pillars: education, innovation and business creation.

EIT Manufacturing works towards building an open and collaborative community of industry leaders, universities, research and technology organisations, and innovative start-ups and scale-ups. It aims to foster cross-border collaboration and increase participation from EIT RIS countries and regions to strengthen European cohesion, integrate suppliers and solution providers, and enhance the resilience of the manufacturing sector.

Developing human capital and supporting entrepreneurship is central to the mission. EIT Manufacturing intends to address skill shortages through reskilling and upskilling in manufacturing, innovation, and entrepreneurship. Initiatives provide accessible training opportunities and hands-on education. Alongside this, they promote safer, more inclusive workplaces and support new businesses by offering services, coaching, funding opportunities, and market access. This dual focus is expected to help attract talent, foster innovation, and drive business creation in manufacturing.

Sustainability and resilience guide EIT Manufacturing's innovation agenda, in line with Industry 5.0 principles. Activities focus on promoting circular and zero-waste manufacturing, advancing decarbonisation across the full value chain, and enhancing supply chain flexibility through technologies like AI and data spaces. The KIC also works to scale up innovations across strategic industries, such as automotive, aerospace & defence, clean technologies, electronics & semiconductors, and energy-intensive industries, to shorten time-to-market and boost European competitiveness.

The Strategic Agenda sets out the key mechanisms to achieve the headline impacts targeted for 2027, outlining the actions and approaches that drive progress toward these objectives. These can be linked to the Strategic Objectives defined in the SA and the impact KPIs of the EIT Impact Framework, as shown in the table in Annex 3.

Importantly, EIT Manufacturing has introduced changes to the Strategic Agenda, specifically modifying the societal impact KPIs. While some definitions remain unchanged, others have been revised and now differ from previous versions. Consequently, certain KPIs apply only to data from 2021–2024, while others do not. These instances are highlighted in the table and the accompanying text below. The same logic has been applied in the subsequent calculations. Indicators which are considered for the analysis are highlighted therein.

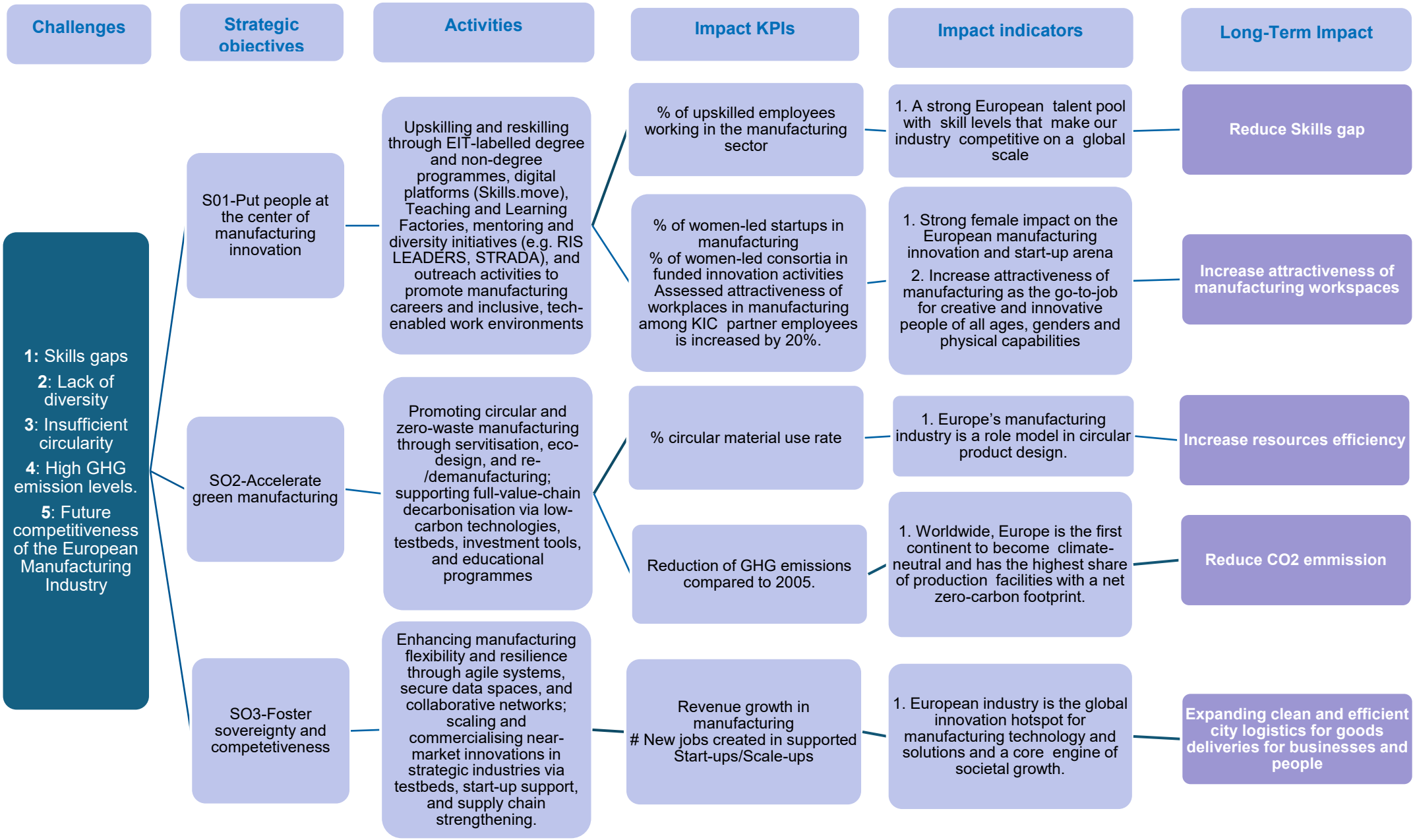
4.7.1 Impact pathway

The following diagram presents the ToC developed based on the Revised Strategic Agenda 2021–2027 of EIT Manufacturing, with particular reference to Annex I, which outlines the industrial challenges, strategic objectives, and expected impacts of the initiative. The pathway captures the three core Strategic Objectives (SO1–SO3) and links them to five key challenges identified in the Agenda: skills gaps, lack of diversity, insufficient circularity, high greenhouse gas emissions, and the future competitiveness of the European manufacturing industry.

Each objective is supported by targeted activities and programmes such as Education, Innovation, Business Creation, and the RIS, which collectively aim to drive systemic change in manufacturing. The pathway also reflects the intended long-term impacts, including a more skilled and diverse workforce, increased adoption of circular practices, reduced emissions, and strengthened industrial resilience and global competitiveness.

This framework provides a clear, structured view of how EIT Manufacturing contributes to the EU's industrial strategy and broader goals for sustainable, inclusive economic growth.

Figure 64. EIT Manufacturing – Impact pathway



4.7.2 Overview of the main achievements

Key achievements[630]

- ✓ **154 innovations launched to the market.**
- ✓ **1 015 supported ventures (start-ups or scale-ups) which attracted over EUR 153 million in investments.**
- ✓ **1 706 graduates from EIT-labelled programmes and over 55 000 participants in non-degree programmes.**
- ✓ **The share of women-led start-ups in the portfolio rose from a negligible level in 2020 to over 25% by 2023. In 2024, women-led ventures received more than 40% of direct funding.**

EIT Manufacturing has been operational since 2020. It unites over 250 active partners from industry, academia, and research to enhance the global competitiveness and sustainability of European manufacturing.

EIT Manufacturing has rapidly established itself as a key driver of innovation, entrepreneurship, and skills development in European manufacturing. It has exceeded most targets for business creation and innovation, made measurable progress in workforce and gender diversity, and contributed to the EU's green and digital transitions. Continued efforts are needed to boost educational outcomes and accelerate sustainability impacts, but the foundation for long-term transformation and competitiveness is robust.

By 2024, EIT Manufacturing streamlined its strategic objectives to three core goals: putting people at the centre of manufacturing, accelerating green manufacturing practices, and fostering sovereignty and competitiveness within the sector. These objectives are pursued through the integration of education, research, and business, forming a "Knowledge Triangle" that is fully aligned with Horizon Europe and EU industrial strategies

The KIC has so far launched 154 innovations to the market, well beyond its target of 113[631], and supported 1 015 start-ups and scale-ups[632], substantially exceeding the target of 634 EIT Manufacturing attracted an impressive EUR 153 million in investments, 50% more than its planned target of EUR 100 million. Non-labelled education and training programs reached over 54 000 participants, significantly surpassing the initial goals 8 606.[633]

EIT Manufacturing has fostered a collaborative ecosystem, expanding its partnership to include 285 stakeholders from 36 countries, and increasing SME participation to 42% of active partners. The calls for proposals have become more open, with nearly 39% of participants in 2023 being new to the KIC.

EIT Manufacturing has demonstrated financial efficiency by attracting nearly EUR 2 in external investment for every EUR 1 of EIT funding, achieving a leverage factor of 1,79. Its operational efficiency remains high, with average running costs constituting only 8,7% of the total budget.

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[630] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025;
[631] Business Plan target figures as SA KPI EITHE02.1 is missing
[632] This number refers to 2020-2024.
[633] All target values referring to 2021-2024 Strategic agenda targets except for marketed innovations.

Despite these successes, EIT Manufacturing faces certain challenges. The outcomes of degree programmes, including graduation rates and start-up creation, remain below expectations. While progress in circularity and emissions reduction is positive, it is slower than desired and requires ongoing attention. The expansion of partnerships and stakeholder engagement needs to accelerate, especially in the post-pandemic context.

Overall, EIT Manufacturing has made significant strides toward enhancing the sustainability and competitiveness of European manufacturing, while remaining focused on its core objectives and addressing the challenges ahead.

4.7.3 Selection of societal impacts

4.7.3.1 A strong European talent pool with skill levels that make our industry competitive on a global scale. Transversal and flexible skills in line with changing job market requirements

% of upskilled employees working in the manufacturing sector

Rapid technological and economic developments across Europe have fundamentally reshaped the landscape of the economy, environment, society, and business within the European Union. In this dynamic and highly competitive context, enterprises are increasingly required to adopt advanced technological solutions, such as Artificial Intelligence, automated production systems, and robotics, to optimise production processes, enhance operational efficiency, and maintain global competitiveness.

The European manufacturing sector, which employed approximately 30 million workers in 2022 and contributed nearly one-quarter of the EU's business economy net turnover (amounting to EUR 9,8 trillion that year), is at the forefront of this transformation. The sector's evolution is driven not only by technological advancement but also by the imperative for sustainability and resilience.[634]

However, the successful adoption of these technologies depends fundamentally on the workforce's skills and adaptability. Recognising this, the European Union has identified the skills gap as one of the most pressing challenges for the future of European industry. For example, the European Year of Skills 2023 was launched to help reach the EU 2030 social target of at least 60% of adults participating in training every year, with manufacturing identified as a priority sector.[635]

Strategic initiatives such as the European Skills Agenda and the Pact for Skills aim to bridge the gap between labour market demands and workforce capabilities. These efforts are complemented by targeted funding programmes, including Horizon Europe and various national co-financed schemes, which support educational and training activities tailored to the evolving needs of industry.

Within the manufacturing sector, the proliferation of digitalisation and automation has widened the gap between the skills employers require and those available in the workforce. The demand for advanced digital and technical skills is increasing rapidly, with recent analyses indicating that 20% of manufacturing jobs now require such expertise.[636] This trend underscores the need for ongoing investment in upskilling and reskilling to ensure the European workforce remains well-equipped to meet the demands of modern manufacturing.

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[634] Eurostat. (2024). Businesses in the manufacturing sector - Statistics Explained. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Businesses_in_the_manufacturing_sector.
[635] European Commission. (2023). European Year of Skills 2023. https://commission.europa.eu/strategy-and-policy/priorities-2019-2024/europe-fit-digital-age/european-year-skills-2023_en.
[636] Cedefop. (2024). Skills Panorama – Manufacturing Sector. https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors.

To address the widening skills gap in the sector, both public and private actors are investing in upskilling and reskilling initiatives. According to Cedefop[637] the manufacturing sector in Europe faces persistent skills mismatches, particularly as digitalisation and automation reshape job requirements. Cedefop's European Skills and Jobs Survey shows that manufacturing workers are less likely to participate in job-related training than the EU average across all sectors, with participation rates especially low among employees in SMEs. Many workers in manufacturing report a need to further develop their technical, digital, and transversal skills to keep pace with technological change.

Cedefop's Skills Forecast further projects that future job openings in manufacturing will increasingly require higher levels of digital and transversal skills, highlighting the importance of both initial and continuing vocational education and training for the sector's competitiveness and resilience.

The job market is thus shifting towards a model of lifelong learning, where workers are expected to continuously adapt to new technologies and processes. Labour shortages persist, but the sector's competitiveness increasingly depends on building a strong talent pool equipped with both specialised and transversal skills. Addressing the skills gap through targeted upskilling and reskilling is not only a strategic imperative for industry but also a cornerstone of Europe's broader economic resilience and sustainability goals.

Within this context, EIT Manufacturing serves as a pillar for enhancing the manufacturing industry through innovation and education. It focuses on developing innovative education and technology solutions that strengthen business competitiveness and sustainability. Through collaborations with universities, research centres, and industry partners, it contributes to the creation of a knowledge and innovation ecosystem, ensuring that the workforce is adequately prepared for the challenges of modern manufacturing. Programmes are aimed at industry executives, young professionals, and students, equipping them with the necessary tools to adapt to modern technological demands while offering them the opportunity to gain practical experience and prepare for the job market.[638]

The Education pillar is the central focus for achieving Strategic Objective 1 (SO1): Put people at the centre of manufacturing innovation. While Education is central to SO1, all education activities are also intended to enhance skills related to the other strategic objectives: Accelerate green manufacturing (SO2) and Foster sovereignty and competitiveness (SO3). Indicatively, the budget allocation for Education in the Business Plan 2023-25 was 26% of the grant.[639] Still, the ultimate objective is a measurable increase in the skill levels of European professionals and practitioners, preparing them for innovation waves that boost industry sustainability and competitiveness.[640]

To achieve this, EIT Manufacturing utilises the EIT Manufacturing Competence Framework and Quality System for systematic skills development, ensuring alignment with EIT Label requirements and industry demands, particularly digital transformation.[641]

Since 2020, EIT Manufacturing has been providing more than 100 different educational projects.[642] Notable examples include the Digital Learning Platform (**Skills.move/EIT Manufacturing Academy**), the largest European learning platform dedicated to manufacturing. Designed by leading experts from academia and industry, it aims to foster innovation and strengthen skills preparedness within the current and future workforce. In addition, the

[637] Cedefop (n.d). https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors?sector=02.05
[638] EIT Manufacturing. (2025). The skills gap and the survival of European industry: https://www.eitmanufacturing.eu/news-events/news/upskilling-in-manufacturing-the-key-to-the-industry-of-the-future/.
[639] EIT Manufacturing Strategic Agenda 2021-2027.
[640] Ibid.
[641] Ibid.
[642] EIT Manufacturing EDU Projects, internal material.

platform contributes to wider synergies by connecting with the EIT Campus and the Deep Tech Talent Initiative Platform. [643]

Teaching Factories Network creates a collaboration space where industry and academia exchange knowledge and co-develop innovative solutions to real industrial challenges. Practitioners share real-life factory experience, while students and faculty contribute research-based insights through continuous online interaction. The **TF KnowNet project** (launched in 2020) expanded this approach into a Europe-wide network of leading industrial partners and universities. In 2024, the Teaching Factories Competition demonstrated the initiative's entrepreneurial impact, as one solver team addressing textile waste management successfully created a start-up based on their project results. Industrial partners also gain access to test beds to validate new concepts and request targeted training for employees.[644]

To address the skills gaps, EIT Labelled Programmes, including **EIT Labelled degree programmes (MSc and PhD)**, and, as of 2023, **EIT Labelled non-degree programmes**, enabled by a new Quality Assurance system, have been delivered to professionals and practitioners.[645]

[643] EIT Manufacturing. EIT Manufacturing and Edunao together for Europe's first digital learning platform in manufacturing: Skills.move.. https://www.eitmanufacturing.eu/news-events/news/skills-move-eit-manufacturings-digital-learning-platform/; https://eitmanufacturingacademy.eu/.
[644] EIT Manufacturing. Teaching Factory. https://www.eitmanufacturing.eu/what-we-do/education/resources/teaching-factory/.
[645] EIT Manufacturing Strategic Agenda 2021-2027.

Table 128. % of upskilled employees working in the manufacturing sector

Impact indicators	Targets	Impacts achieved
% of upskilled employees working in the manufacturing sector	34% by 2024, 36% by 2027	Before assessing the impacts, it is worth considering them in the context of the outputs delivered by EIT Manufacturing since its inception. In total, 112 programmes were implemented up to and including the year 2024.[646]

Row Labels	2020	2021	2022	2023	2024	Grand Total
Degree Programme (Doctoral)	1	1		1		3
Degree Programme (Master's)	1	1		1		3
3Funded Project	19	26	25	22	9	101
Non-degree (summer/winter school)				1		1
Other		1		1		2
Summer / Winter school		2				2
Grand Total	**21**	**31**	**25**	**26**	**9**	**112**

Between 2021 and 2023 inclusive, 32 778 individuals received education and training. Of these, 1 142 were students enrolled in higher education programmes, while 32 636 participated in non-degree training courses. This shows the important role of non-degree education in the sector.

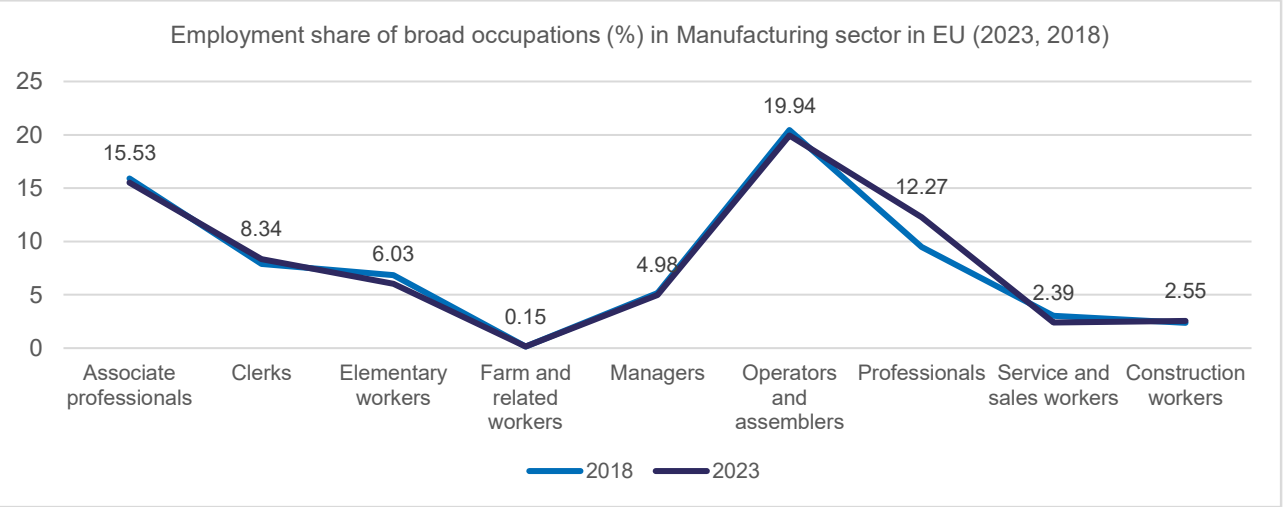
KPI	2021	2022	2023
EITHE09[647]	38	55	1049
EITHE08[648]	5 856	9 477	16 303[649]

The indicator is designed to be based on surveys conducted among supported organisations, asking them to estimate the proportion of employees whose completed training helped close identified skills gaps. A baseline of 31%, derived from an internal survey, has been established, with an additional benchmark of 42% from the WEF Future of Jobs Report 2020. As this new indicator has not yet been measured or reported, the current focus is on gathering and analysing other supporting data.

[646] EIT Manufacturing EDU Projects, internal material.
[647] Sum of students enrolled in EIT labelled master's, EIT labelled PhD programmes, participants in EIT labelled Fellowship schemes and other education activities awarded EIT Label.
[648] Number of successful participants in EIT professional development courses, online training courses and other education/training activities delivered or in a process of delivery.
[649] EIT internal monitoring data.

In 2023, 31 943 300 individuals were employed in the manufacturing sector across the EU. Since 2018, there have been no significant changes in the roles within the sector. However, from the perspective of this impact KPI, it is noteworthy that the share of professionals within occupational categories increased from 9,48% to 12,27%,[650] as illustrated in Figure 65 below.

Figure 65. Employment share in broad occupations (manufacturing, EU 2018-2023)



In 2023, the sector's workforce was composed of 18,4% with a low level of education, 53,9% with a medium level, and 27,6% with a high level of education.[651] Looking at the EU as a whole, employment in high-tech occupations stood at 20,4% in 2023, though the distribution varied considerably across Member States. The lowest share was observed in Cyprus (6,5%), while the highest levels were recorded in Finland (37,2%) and Sweden.[652]

At the same time, EIT Manufacturing reports that 26,4% of employees in the manufacturing sector are highly qualified, meeting its target for 2024 as set out in the previous Strategic Agenda. However, this is a different indicator, originating from the earlier strategic framework, and should be interpreted accordingly.[653]

[650] https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors?sector=02.05#8.
[651] Ibid.
[652] Ibid.
[653] Impact KPI in previous Strategic Agenda: % of highly qualified employees working in the manufacturing sector reaches 30% (24% in 2017).

Impact attribution

The indicator "% of upskilled employees working in the manufacturing sector" is designed to measure EIT Manufacturing's contribution to building a strong European talent pool equipped with transversal and flexible skills aligned with evolving job market requirements. This indicator directly supports the objective of ensuring that Europe's manufacturing workforce remains competitive globally by addressing critical skills gaps in digitalisation, automation, and sustainability.

When comparing EIT Manufacturing's efforts with EU-level trends, both are moving in the same direction: towards a more skilled and adaptable workforce. EU data show a gradual increase in the share of professionals in manufacturing, rising from 9,5% to 12,3% between 2018 and 2023, and a slow but steady growth in high-tech occupations (20,4% EU average). EIT Manufacturing has scaled up its education and training offer, delivering over 100 programmes, including both degree and non-degree learners. These actions align with EU priorities such as the European Skills Agenda and the Pact for Skills, which aim to close the skills gap and achieve the EU 2030 target of 60% adult participation in training annually.

However, the pace of change remains slow. Despite these efforts, 18,4% of the manufacturing workforce still has low education levels, and participation in job-related training in manufacturing continues to lag behind other sectors, particularly among SMEs. This indicates that while EIT Manufacturing's initiatives are aligned with EU objectives and contribute to positive trends, their impact is concentrated at the programme level.

EIT Manufacturing provided critical enablers, including specialised training programmes, partnerships with universities and industry, and access to innovation ecosystems. That helped upskill thousands of employees; however, systemic outcomes such as reducing the overall skills gap depend on multiple factors, including national education policies, company-level investment in training, and broader labour market dynamics. Therefore, this KPI should be interpreted as evidence of EIT Manufacturing's contribution to workforce upskilling, rather than as a driver of EU-level skills transformation.

Table 129. Impact attribution "% of upskilled employees working in the manufacturing sector"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
% of upskilled employees working in the manufacturing sector	This indicator measures the share of employees in the manufacturing sector who have completed training aimed at closing identified skills gaps, supported by EIT Manufacturing. The logic assumes that EIT Manufacturing's programmes played a key role in enabling these outcomes, but acknowledges that other factors, such as national policies, company initiatives, and EU-wide skills strategies, also contributed.	**Contribution** – EIT Manufacturing helped upskill employees, but cannot claim full attribution	**Moderate –** Based on internal programme data (number of participants, type of training) and survey-based estimates from supported organisations.	**Scope limitations:** The KPI focuses on employees reached through EIT Manufacturing-supported programmes and does not capture the overall share of upskilled workers in the EU manufacturing sector. **External factors:** Broader skills development depends on national education systems, company-level training investments, and EU policy frameworks. **Attribution complexity:** While EIT Manufacturing provided essential support, systemic skills transformation requires coordinated action across multiple stakeholders.

4.7.3.2 Strong women impact on the European manufacturing innovation and start-up arena

Share of women (25-64) scientists and engineers in manufacturing at least 30% (baseline 20% in 2018).

Women Board Members in Manufacturing companies above 40% (baseline 31,2% in 2020).

% of women-led startups in manufacturing (updated SA)

% of women-led consortia in funded innovation activities (updated SA)

Women remain significantly underrepresented in the global manufacturing workforce and leadership, despite the sector's growing demand for skilled labour and the potential for inclusive growth. Multiple barriers deter women from entering and remaining in the manufacturing sector. These include persistent gender bias in hiring and promotion practices and broader societal perceptions that manufacturing is a men-dominated industry. According to Eurostat, women accounted for only 22,4% of scientists and engineers in the manufacturing sector in 2023, compared to 45,6% in service-related industries. This underrepresentation extends to leadership and innovation: women hold just 19% of top academic positions in engineering and technology across the EU, and only 9% of patent applicants are women, a figure that has remained stagnant over the past decade.[654]

Women often face limited access to digital technologies and are underrepresented in STEM fields, which are critical areas for the increasingly digital and automated manufacturing environment. Globally, women make up only 35% of STEM students in higher education, and just 3% pursue information and communication technology (ICT)-related studies.[655]

Horizontal occupational segregation continues to impact women's participation. Women tend to be concentrated in sectors such as education, health, and social sciences, whereas men are overrepresented in engineering and natural sciences. This imbalance is not simply a result of personal choice but is shaped by structural barriers and deeply rooted sociocultural influences. Stereotyping further undermines women's participation. Women exposed to negative stereotypes about their abilities in STEM are more likely to underperform or withdraw from these fields. The lack of visible women role models in technical roles exacerbates this issue, reinforcing a perception among girls and women that success in high-level STEM positions is unattainable.[656]

Women currently comprise less than 30% of the manufacturing workforce in many countries.[657] In 2023, employment in the EU manufacturing sector was the highest of all sectors (31,9%), yet it was predominantly male, with men representing 69,5% of the employed population, while women accounted for 30,4%.[658] In emerging economies, however, the sector is expected to be a significant source of employment growth through 2030. Analysis across ten countries indicates that manufacturing could account for up to 26% of potential job gains for women.[659]

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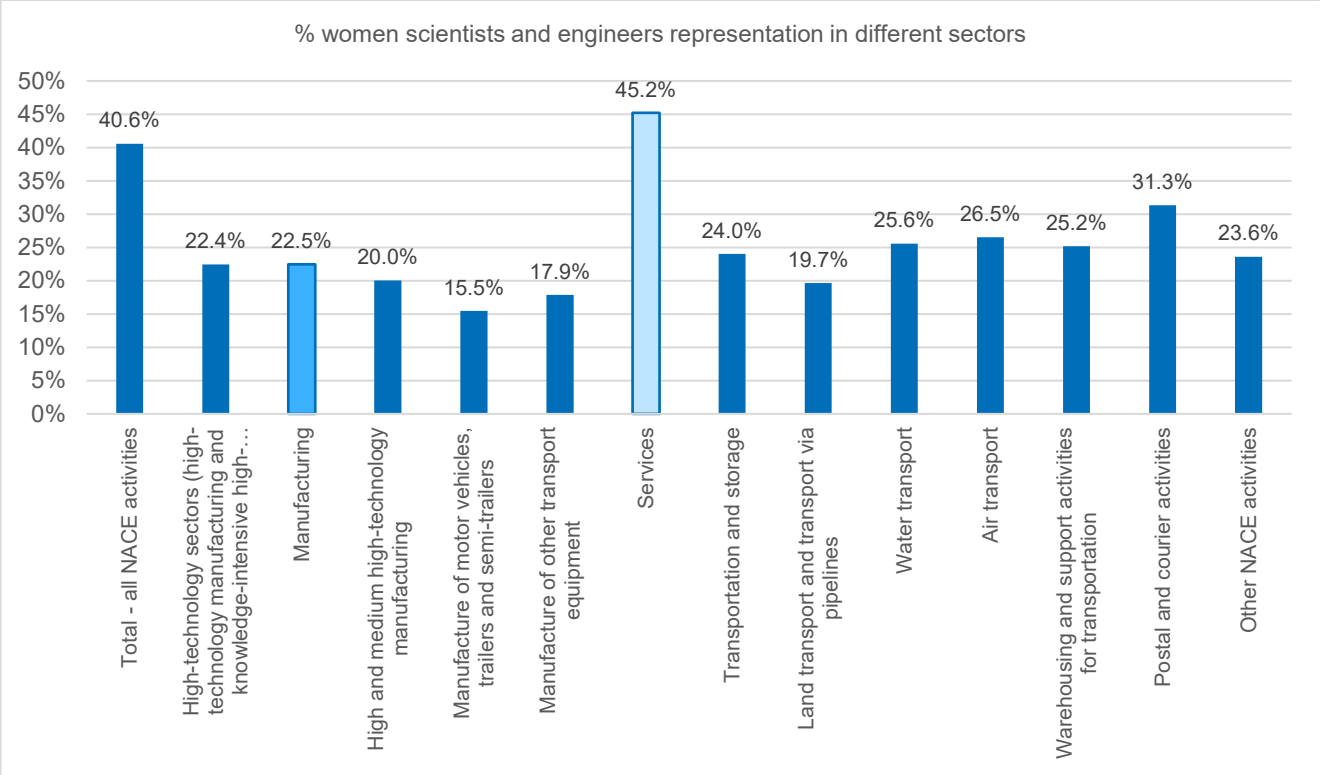
[654] European Commission (2024). She Figures 2024: https://projects.research-and-innovation.ec.europa.eu/en/knowledge-publications-tools-and-data/interactive-reports/she-figures-2024
[655] McKinsey Global Institute. (2019). The future of women at work: Transitions in the age of automation. McKinsey & Company.https://www.mckinsey.com/~/media/mckinsey/featured%20insights/gender%20equality/the%20future%20of%20women%20at%20work%20transitions%20in%20the%20age%20of%20automation/mgi-the-future-of-women-at-work-report-july-2019.pdf.
[656] Young Manufacturing Leaders. #YMLWomen – Why so few women in manufacturing?. https://youngmanufacturingleaders.org/why-so-few-women-in-manufacturing; EIT Manufacturing. STRADA launches new call for women in manufacturing. https://www.eitmanufacturing.eu/news-events/news/strada-launches-new-call-for-women-in-manufacturing/
[657] McKinsey Global Institute. (2019). The future of women at work: Transitions in the age of automation. McKinsey & Company.https://www.mckinsey.com/~/media/mckinsey/featured%20insights/gender%20equality/the%20future%20of%20women%20at%20work%20transitions%20in%20the%20age%20of%20automation/mgi-the-future-of-women-at-work-report-july-2019.pdf.
[658] Cedefop. Skills intelligence. https://www.cedefop.europa.eu/en/tools/skills-intelligence/sectors?sector=02#1.
[659] Ibid.

As of 2024, women hold 23% of leadership positions in manufacturing businesses in the United States. Within the sector, the highest women's representation is seen in functions such as Human Resources, Business Operations, and Quality Control, which are traditionally less technical.[660]

Recent data from 2024 in the European Union shows that 45,2% of scientists and engineers in the services sector are women. In contrast, only 22,5% of those in the manufacturing sector are women, as presented in Figure 66.

Figure 66. Women scientists and engineers' representation in different sectors (EU27, 2024)

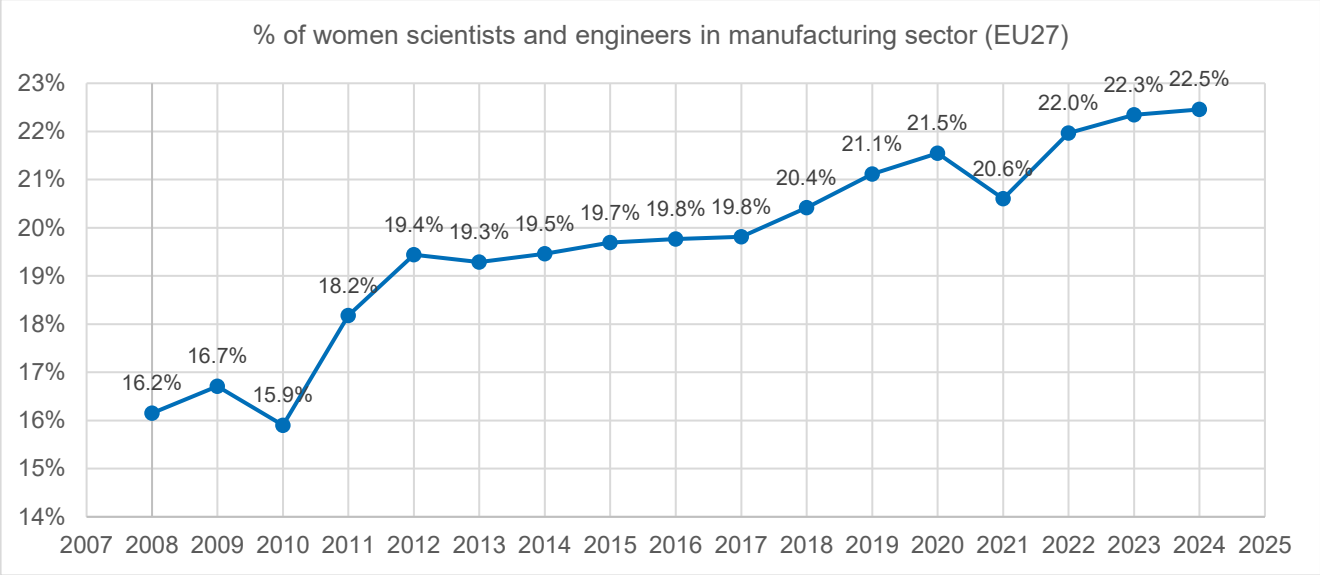


Source: Ecorys, based on Eurostat[661]

While there has been a modest upward trend in these numbers, as shown in the graph below, there is a widely acknowledged need to accelerate progress and improve gender diversity in manufacturing-related STEM roles (Figure 67).[662]

[660] Women in Manufacturing Association. (2024). Career advancement survey report. https://assets.noviams.com/novi-file-uploads/wim/Data_and_Research/2024_Career_Advancement_Survey_Report-48c2f224.pdf
[661] Eurostat. Database. https://ec.europa.eu/eurostat/databrowser/view/hrst_st_nsecsex2.
[662] Ibid.

Figure 67. % of women scientists and engineers in the manufacturing sector (EU27, 2008-2024)



Source: Ecorys, based on Eurostat data[663]

Against the backdrop of persistent gender disparities in the manufacturing sector, EIT Manufacturing has taken targeted and strategic action to promote women's participation and leadership across the industry, for example:

- Supporting education and skills development: EIT Manufacturing contributes to the **Girls Go Circular** programme,[664] which equips young women with digital and entrepreneurial skills through a free online learning platform. By addressing the digital and ICT education gap, the programme promotes sustainability awareness and equal access to future-oriented careers.
- Advancing women in leadership and innovation:
  - ▷ **STRADA**[665] supports women pursuing MSc and PhD degrees in engineering, as well as professionals in the manufacturing sector, by equipping them with the skills to start or grow their own businesses and advance their careers in academia or industry. The programme offers a structured learning environment that combines mentoring, peer exchange, and practical skill development to strengthen women's leadership and visibility in the industrial landscape.
  - ▷ Coordinator of the consortium delivering the **Women TechEU** project.[666] EIT Manufacturing supports women founders of deep tech startups across Europe. This two-year EU-funded initiative provides non-dilutive grants of EUR 75,000 to selected participants, alongside a tailored business development programme including mentoring, coaching, and specialised training. With 4 planned calls, the project aims to support 160 women entrepreneurs.
  - ▷ The **LEADERS – Women Innovators in Manufacturing**[667] under the EIT RIS is a yearly programme taking place since 2021 and to be continued also in the future. The programme aims to empower women in manufacturing by identifying outstanding women innovators. Every year, the programme provides

[663] Eurostat. Database. https://ec.europa.eu/eurostat/databrowser/view/hrst_st_nsecsex2.
[664] EIT Community. Girls Go STEM. https://eit-girlsgocircular.eu/.
[665] EIT Manufacturing. (2023). Supporting Training and Networking of Women in Manufacturing. https://www.eitmanufacturing.eu/news-events/activities/strada-project/.
[666] WomenTech EU. Supporting women leading deep tech startups from Europe. https://womentecheurope.eu/, see also the case study below for details.
[667] EIT Manufacturing. LEADERS – Women Innovators in Manufacturing at EIT RIS. https://www.eitmanufacturing.eu/news-events/activities/leaders/.

pitch training to up to 60 candidates, showcasing the top six innovators through success stories, and awarding prizes to the three best.

The following Table 130 provides an overview of the impacts achieved for KPI Share of women scientists and engineers in manufacturing / women Board Members in Manufacturing companies / % of women-led startups / % women-led consortia in funded innovation activities.

Table 130. Share of women scientists and engineers in manufacturing / women Board Members in Manufacturing companies /% of women-led startups /% women-led consortia in funded innovation activities

Impact indicators	Targets	Impacts achieved
Share of women (25-64) scientists and engineers in manufacturing	At least 30%	Achieving an impact target is not solely within the remit of EIT Manufacturing. Rather, this objective is contingent on broader structural factors that shape both the barriers to entry and levels of participation for women in the sector. By the end of 2023, EIT Manufacturing had made significant progress in promoting gender inclusion through its education initiatives. A total of 6 889 women participated in upskilling and reskilling courses, accounting for 42% of all participants, well above the 30% target. Furthermore, 98% of these women completed one or more courses, exceeding expectations for satisfaction and retention.[668] While progress in the sector is evident and moving in the right direction, growth remains steady yet slow, as reflected in external data on the participation of women scientists and engineers in the sector provided below. **2020**: 21,55% **2021**: 20,61% **2022**: 21,97% **2023**: 22,35% **2024**: 22,46%[669] The STRADA leadership programme was also successfully delivered, engaging 147 mentees (98 of whom completed at least 15 hours of training), supported by 100 mentors. The programme fostered a LinkedIn community of over 700 members, reached more than 1 000 individuals, and included 17 workshops with over 360 participants.[670]
Women Board Members in Manufacturing companies	Above 40%	EIGE reports indicate a steady increase in women's participation in manufacturing company boards, aligning with EIT Manufacturing's impact goals. However, as in the case of the indicator above, achieving this objective depends on a wider range of factors influencing the sector. **2020 (Q3,4)**: 31,9% **2021 (Q3,4)**: 31,9% **2022 (Q3,4)**: 32,7% **2023 (Q3,4)**: 34,5% **2024 (Q3,4)**: 35,6%[671] By the end of 2023, EIT Manufacturing made notable progress in supporting women-led startups. The share of women-led ventures in the Business Creation portfolio reached 25%, surpassing the target.

[668] EIT Manufacturing DEL5.33 - GENDER MAINSTREAM report. May 2024, Paris.
[669] Eurostat. Database. https://ec.europa.eu/eurostat/databrowser/view/hrst_st_nsecsex2.
[670] EIT Manufacturing DEL5.33 - GENDER MAINSTREAM report. May 2024, Paris.
[671] https://eige.europa.eu/gender-statistics/dgs/embed/iframe/indicator/wmidm_bus_bus__wmid_comp_compbm/datatable.

% of women-led startups in manufacturing	2024 - 20%, 2027 – 25%	Business support efforts also yielded strong results, with the startup ai-omatic securing EUR 2 million in early 2024.[672] Considering the KPI "Start-ups and scale-ups supported by KICs [EITHE03]: Gender of the owner/CEO," which tracks ventures provided with mentoring, consultancy on access to finance and markets, product/service marketing, legal advice, internationalisation, matchmaking, etc., the participation of women CEOs in manufacturing companies is consistently growing. **2020**: 2/62 (0,3%) **2021**: 13/95 (13,68%) **2022**: 72/376 (19,14%) **2023**: 81/321 (25,23%)[673] At the same time, in terms of direct investment by EIT Manufacturing, the participation of women-led enterprises is on the rise. The data for 2024 show that such ventures represented almost half of all supported companies and received more than 40% of the total funding. **2021**: 0%, 0% total funding **2022**: 20%, 20% total funding **2023**: N/A **2024**: 46,15%, 40,37% total funding[674] Additionally, efforts to foster corporate partnerships led to a successful commercial collaboration between Smartfab (a women-led startup) and Dana Italy (by 2023).[675]
% of women-led consortia in funded innovation activities	2024 – 20%, 2027 – 25%	This indicator was introduced in 2024 and is monitored and reported on since then. However, EIT Manufacturing took concrete steps to enhance gender inclusion within its innovation activities. As part of the CfP2023 call, 6 women took on leadership roles as Activity Leaders, and 3 served as Business Owners responsible for commercialisation, marking a meaningful step toward more balanced representation in innovation consortia. Additionally, the CfP2024 guidelines were updated to include gender balance as a criterion not only in team composition but also in the innovation content itself.[676]

[672] EIT Manufacturing DEL5.33 - GENDER MAINSTREAM report. May 2024, Paris.
[673] EIT KICs KPI monitoring data 2017-2023.
[674] EIT Manufacturing Investment portfolio.
[675] EIT Manufacturing DEL5.33 - GENDER MAINSTREAM report. May 2024, Paris.
[676] Ibid.

Case study: Women TechEU

Initiative highlights

Women TechEU is coordinated by EIT Manufacturing. The programme is a multi-KIC collaboration involving EIT Health, EIT Climate-KIC, and EIT Food. It aims to support women-led deep tech start-ups across Europe, leveraging cross-sectoral expertise to foster gender-balanced innovation ecosystems. The initiative was initially established by EISMEA as a pilot in 2021 and, in 2024, transitioned into a consortium model, led by EIT Manufacturing.[677] It involves 12 partners from across Europe, with regional chapters established in cities such as Barcelona, Paris, Dublin, and Amsterdam, ensuring broader geographical inclusion. This case study primarily focuses on the 2024-2026 edition under EIT Manufacturing leadership.

The initiative addresses the underrepresentation of women in deep tech entrepreneurship by tackling barriers such as limited access to funding, mentorship, and visibility. Its impact continues to grow: the third open call in 2025 received a record-breaking 1 038 applications from 42 eligible countries, demonstrating its expanding reach and influence.[678]

To date, 120 women-led deep tech startups[679] have received EUR 75,000 equity-free grants and tailored business support through Women TechEU, with the programme aiming to reach 160 supported start-ups by 2026. This has led to the development of innovative solutions, strengthened cross-border collaborations, and significantly enhanced visibility for women founders across the EU.

Context and rationale

The Women TechEU initiative was launched in response to persistent societal and economic disparities in the European innovation landscape, particularly the underrepresentation of women in deep tech entrepreneurship. Despite the growing importance of deep tech in driving sustainable and inclusive growth, women-led startups continue to face systemic barriers, including limited access to funding, mentorship, visibility, and investor networks. These challenges are compounded by gender biases in venture capital and innovation ecosystems, which hinder women's full participation in shaping Europe's technological future.

To address these gaps, the programme conducted a semi-formal needs assessment during the onboarding of each cohort, involving one-to-one interviews with selected founders to identify specific support needs and tailor services accordingly. This process revealed critical gaps in fundraising readiness, market access, and strategic visibility, which were then addressed through customised mentoring, pitch preparation, and community-building activities.

As a result, Women TechEU was able to provide targeted interventions that directly responded to the unique challenges faced by women-led start-ups, ensuring that each participant received the most relevant support for their stage of development.[680]

Women TechEU is designed to complement and align with national and international initiatives supporting women in deep tech.[681] The programme collaborates closely with other EU-funded projects and networks, such as Women Invest EU[682], We Rise[683], Supernovas[684], and Girls Go Circular,[685] as well as with the broader EIT community.

This collaboration is achieved through joint activities, working groups, and shared matchmaking events, ensuring that support for women entrepreneurs is coordinated and mutually reinforcing rather than duplicative. Women TechEU also contributes to local, national, and European policy development by publishing policy papers and engaging with stakeholders to inform and shape future support mechanisms.

Leveraging the strengths of its consortium partners and connecting beneficiaries to a broader ecosystem, Women TechEU integrates its efforts with existing structures, amplifying impact and fostering a more cohesive support landscape for women-led startups across Europe.[686]

[677] WOMEN TechEU. WOMEN TechEU Consortium. https://womentecheurope.eu/about-us/ .
[678] WOMEN TechEU. 3rd Call Statistics. https://datahub.womentecheurope.eu/statistics3/ .
[679] WOMEN TechEU. Data hub. https://datahub.womentecheurope.eu/participants/ .
[680] Beneficiary Women TechEU input.
[681] EIT Manufacturing input.
[682] European Commission. Women in Tech. https://women-invest.ec.europa.eu/sites/default/files/2025-09/WIEU_Website_OnePage_V4_0.png .
[683] WE Rise. About us. https://www.we-rise.eu/about .
[684] EIT Community. About EIT Supernovas. https://supernovas.eitcommunity.eu/about/ .
[685] EIT Community. Girls Go STEM. https://eit-girlsgocircular.eu/#about-us .
[686] WOMEN TechEU. About the scheme. https://womentecheurope.eu/about/ .

About the initiative

Women TechEU was established by setting clear, measurable objectives aligned with both EU-level strategies, such as the European Innovation Ecosystems work programme and the Gender Equity Strategy 2020-2025, and the specific needs identified through co-creation activities, including semi-formal needs assessments and one-to-one interviews with founders.

The programme offers a robust support structure, specifically designed for women-led deep tech startups. Selected companies are chosen through a highly competitive open call based on criteria such as innovation potential, team composition with women in leadership roles, market readiness, and alignment with EU innovation and gender equity goals.[687] They receive EUR 75 000 in equity-free funding, tailored mentoring, business coaching, pitch preparation, and access to a vibrant community through events, workshops, and cross-KIC (Knowledge and Innovation Community) collaboration.[688]

The consortium model brings together a wide network of universities, research centres, investors, and local innovation hubs, enabling the programme to draw on sector-specific expertise and provide startups with unparalleled access to diverse communities and opportunities. This collaborative approach allows each participant to benefit from a broader ecosystem of support, maximising their potential for growth and impact.

Since its launch, Women TechEU has organised multiple calls for applications within each programme edition, enabling broader participation and continuous intake of high-potential startups. For example, in its fourth call alone, the initiative received a record 1 107 applications, ultimately selecting 40 winners and 20 “badges of honour” for high-scoring but unfunded applicants, ensuring broader recognition and support. Across all editions and calls, the initiative has supported almost 200 startups,[689] delivered hundreds of mentoring and training sessions and facilitated numerous matchmaking and networking events.

Outcomes include the creation of new products and services, increased investment readiness, and the emergence of community-led spin-offs and regional chapters in cities like Barcelona, Paris, Dublin, and Amsterdam.

Women TechEU played a pivotal role in RoboTwin’s development by providing targeted support across several dimensions. First, the programme granted access to 24 hours of EIC coaching, which included specialised sales training and participation in the Women Leadership programme. This mentoring, delivered by EIC experts, was highly beneficial for the company’s growth, equipping the team with essential skills and leadership insights. Second, although the funding from Women TechEU was smaller than that from other programmes in which RoboTwin participated, it nonetheless provided significant financial support. The grant was delivered as a lump sum, making it efficient and easy to use for the company’s operational needs. Third, the programme substantially enhanced the company’s visibility and facilitated access to a broad network of partners and opportunities. This included participation in initiatives such as Supernovas and other mentoring programmes, which collectively helped RoboTwin to expand its connections and raise its profile within the European innovation ecosystem.[690] Importantly, the programme fostered a vibrant, self-sustaining community among women entrepreneurs in deep tech, which organises peer-to-peer activities and in-person gatherings at major European events. The establishment of regional chapters provides local hubs for ongoing collaboration and knowledge sharing, further anchoring the programme's sense of community.

Societal impacts

Women TechEU has had a transformative impact on individual women entrepreneurs, on strengthening the broader innovation ecosystem, and on driving perceptual and policy shifts towards greater gender equity in deep tech. Through its comprehensive support, the programme has enabled founders to develop entrepreneurial skills, gain confidence, and achieve tangible business outcomes.

Many participants have credited Women TechEU as pivotal in helping them secure employment, launch or scale their ventures, and bring new products and services to market. For example, RoboTwin benefited from targeted

EIC coaching, the Women Leadership programme, and participation in initiatives which collectively enhanced their skills, visibility, and connections within the European innovation ecosystem.[691]

Hundreds of participants have benefited from tailored workshops, pitch sessions, and community-building events, resulting in measurable improvements in investment readiness and market access. Box 1 provides details on RoboTwin's journey through EIT programmes.

Box 1. Startup RoboTwin's journey through EIT programmes

RoboTwin is a Prague-based deep-tech startup founded by Megi Mejdrechova in response to a market need for manufacturing automation. The company's journey exemplifies how EIT's targeted support, funding, and network can enable the creation, growth, and internationalisation of women-led ventures that might otherwise struggle to get off the ground.

Year	Program	EIT Added-Value	Description of EIT added value
2021	Jumpstarter	Very High	Without EIT Jumpstarter, RoboTwin would likely not exist; the programme provided essential early mentorship, training, and network access, giving the founders the confidence and skills to launch the company.
2023	Innovation Call	High	The very high added value stems from substantial funding for tech and business development, direct support in bringing the product to market, and increased visibility through EIT events and competitions. EIT's network recommended RoboTwin to apply for Women TechEU, opening further opportunities.
2022/2023	Women TechEd	Medium	Participation in Women TechEU brought equity-free funding, EIC coaching, and sales training. While the grant was smaller and the company more established, the programme was instrumental in preparing for the EIC Accelerator and expanding strategic mentoring.
2025	EITM investment in pre-seed	Medium	EIT Manufacturing's co-investment enabled RoboTwin to increase its funding round and remain embedded in the EIT network. This strategic move ensured ongoing access to mentors, industrial partners, and innovation communities.
2025	EIC Accelerator	Expectedly High	The culmination of EIT's support, the EIC Accelerator offers blended funding and the chance to scale internationally. This stage builds directly on the credibility and results achieved through earlier EIT programmes, enabling advanced technology development and market expansion.

The journey of RoboTwin demonstrates that in countries where national support for start-ups is either non-existent or extremely difficult to access, EIT's support can be decisive in enabling women-led ventures to

[687] EIT Manufacturing input.
[688] WOMEN TechEU. About the scheme. https://womentecheurope.eu/about/ .
[689] WOMEN TechEU. https://datahub.womentecheurope.eu/participants/ .
[690] Beneficiary Women TechEU input.
[691] Beneficiary Women TechEU input.

progress from academic research to market-ready products. As Megi Mejdrechova notes, "We would not have founded the company otherwise. The company may not have existed without EIT Jumpstarter, and we would not have brought our product to market without Innovation Call funding".[692]

The initiative's reach extends beyond individual beneficiaries. Partners organisations, including universities, research centres, innovation hubs, and EIT KICs, have gained expanded networks, new funding opportunities, and increased visibility within the European innovation landscape. Cross-KIC collaboration has fostered knowledge exchange and resource sharing, amplifying the reach and effectiveness of support for women entrepreneurs.

Box 2. Cross-KIC Collaboration – an EIT added value

Cross-KIC collaboration is a defining feature and added value of the Women TechEU programme, enabled by the EIT's unique structure and network. In practice, this collaboration involves EIT Manufacturing, EIT Food, EIT Climate-KIC, and EIT Health working together as a consortium of 12 partners to coordinate, share responsibilities, and leverage their respective communities to attract and support women entrepreneurs across diverse sectors.[693]

Each KIC contributes sector-specific expertise and access to its network, which is crucial for reaching women founders in fields such as manufacturing, health tech, and climate tech. For example, EIT Health plays a crucial role due to the high number of women in health tech, while EIT Manufacturing coordinates the overall project and fosters collaboration among partners.[694]

The KICs use their communication channels to promote the programme and actively connect winners to further opportunities within their networks, bridging the gap between initial support and the EIC Accelerator. This is illustrated by the case of RoboTwin, a startup that progressed from Women TechEU through EIT Manufacturing support to eventually securing the EIC Accelerator.[695] It demonstrates how cross-KIC collaboration creates a pathway for women entrepreneurs to scale their ventures.

The consortium also draws on its collective experience in managing funding mechanisms and cascade funding, strengthening the programme's ability to deliver tailored mentoring, fundraising support, and community-building activities.

Cross-KIC collaboration extends to joint activities with other EU initiatives, such as Women Invest EU, Supernovas, and Girls Go Circular, as well as participation in working groups and matchmaking events. These partnerships maximise deal flow, resource efficiency, and impact, while intentional overlaps between programmes address specific regional or technological needs.

The added value of EIT lies in its capacity to connect diverse actors, facilitate knowledge exchange, and create a coherent support ecosystem that would be difficult to achieve through isolated national or sectoral programmes. In summary, cross-KIC collaboration within Women TechEU exemplifies how the EIT's integrated approach enables more effective, scalable, and inclusive support for European women innovators.[696]

These partnerships have enabled the creation of regional chapters and community-led spin-offs, embedding the programme's impact at the local level. For instance, EIT Health's extensive network has promoted the programme, connected founders to clinicians and investors, and facilitated market access in countries such as Spain,

[692] Beneficiary Women TechEU input.
[693] WOMEN TechEU. About the scheme. https://womentecheurope.eu/about/ .
[694] EIT Health input .
[695] Beneficiary Women TechEU input.
[696] EIT Manufacturing input.

Germany, and the Netherlands. Success stories like the one mentioned in Box 3 illustrate how tailored support and visibility have translated into substantial investment and business growth.

Box 3. EIT Health Impact on Women TechEU

EIT Health has played a crucial role in broadening the reach and effectiveness of Women TechEU, demonstrating that the programme's impact extends well beyond EIT Manufacturing. Through its extensive European healthcare network, EIT Health has promoted the programme, connected women entrepreneurs to relevant opportunities, and secured strong engagement from the health sector. This has resulted in a significant presence of healthcare start-ups among Women TechEU's winners, with many founders benefiting from tailored support, including introductions to clinicians and investors, as well as participation in flagship initiatives like Supernovas.

Notable examples include RespiQ, which accessed the EIC Accelerator with EIT Health's support, and ICAP, a Barcelona-based startup that secured substantial investment and business growth following its participation. Evolving Therapeutics also formed new EU-level collaborations as a direct result of the programme, highlighting the value of cross-border synergies.[697]

Beyond individual support, EIT Health has fostered a vibrant community among women founders through local events, such as gatherings during the Mobile World Congress in Barcelona, and through media outreach that has raised the profile of women leaders in health tech. By bridging educational and industry gaps, connecting entrepreneurs to boot camps, summer schools, and role models, and encouraging participation in investment opportunities, EIT Health has contributed to a broader cultural shift.[698]

This has not only enhanced the credibility and reach of participating start-ups but has also inspired further policy interest and cross-sector collaboration, reinforcing that Women TechEU's impact is truly pan-European and cross-sectoral.

At the ecosystem level, Women TechEU has contributed to a shift in the regional and national innovation environment by raising awareness of the challenges women face in deep tech and inspiring new policy interest and action. The collaborative model and integration with other EU and national initiatives, such as Women Invest EU[699], Supernovas[700], and Girls Go Circular,[701] have created synergies that reinforce existing support structures while filling critical gaps, particularly in transitioning from early-stage support to advanced acceleration.

The introduction of the badge of honour has provided recognition and visibility to promising founders who might otherwise have been overlooked, helping foster a culture of encouragement and resilience. The programme has also inspired new collaborations, policy interest, and community-led spin-offs, demonstrating the far-reaching and lasting impact of EIT-enabled support. There has been a visible shift in public perception regarding women's role in deep tech, with increased media coverage, advocacy from policymakers, and growing recognition of women's leadership in innovation.

The distinct **added value** of the EIT in Women TechEU lies in its unique ability to mobilise the entire Knowledge Triangle, integrating education, research, and business, to create a truly pan-European support ecosystem for women innovators. This wide reach connects women entrepreneurs not only to academic and research expertise but also to industry partners and investors, providing a holistic foundation for growth and innovation.[702]

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[697] EIT Health input.
[698] Ibid.
[699] European Commission. Women invest. https://women-invest.ec.europa.eu/sites/default/files/2025-09/WIEU_Website_OnePage_V4_0.png .
[700] EIT Community. About EIT Supernovas. https://supernovas.eitcommunity.eu/about/ .
[701] EIT Community. Girls Go STEM. https://eit-girlsgocircular.eu/#about-us.
[702] EIT Manufacturing input

Crucially, EIT's cross-sectoral approach, bringing together KICs from manufacturing, health, food, and climate, enables the programme to address complex challenges, such as gender equity in deep tech, from multiple perspectives. This collaborative approach is particularly valuable for women founders whose ventures often span several sectors, as it facilitates tailored support, knowledge exchange, and access to diverse networks.[703, 704]

EIT's structure and reputation make it uniquely positioned to guide women entrepreneurs along a coherent pathway of support, from early-stage mentoring and training to advanced investment and internationalisation. Through Women TechEU, participants are not only supported within the programme but are also actively connected to further opportunities in other EIT initiatives and Horizon Europe programmes, such as the EIC Accelerators. The journey of RoboTwin, progressing from early EIT programmes to Women TechEU and ultimately towards the EIC Accelerator, exemplifies this strategic, stepwise support that would be difficult to replicate outside the EIT ecosystem.[705]

Impact attribution

These indicators collectively aim to measure EIT Manufacturing's contribution to increasing women's participation and leadership in the manufacturing sector, addressing persistent gender imbalances in STEM and industrial innovation. The logic is that by supporting women's talent through education, entrepreneurship, and leadership programmes, EIT Manufacturing helps create a more inclusive and competitive manufacturing ecosystem.

At the EU level, progress toward gender equality in manufacturing is slow. Women represent just over 30% of the manufacturing workforce and only 22,5% of scientists and engineers in the sector, compared to 45% in services. Similarly, women's representation on manufacturing company boards remains below parity, despite gradual improvement.

Against this backdrop, EIT Manufacturing's portfolio results suggest stronger momentum. Women's participation in EIT-supported upskilling and reskilling programmes reached 42%, well above the 30% benchmark, suggesting that EIT Manufacturing is moving faster than the sector average in creating opportunities for women to acquire relevant skills. Likewise, the share of women-led startups in the EIT Manufacturing portfolio has grown significantly, from negligible levels in 2020 to over 25% by 2023, with women-led ventures receiving more than 40% of direct funding in 2024. These results stand in contrast to the wider EU context, where women-led manufacturing start-ups remain relatively uncommon.

However, indicators such as the overall share of women scientists and engineers (22,5%) and women on boards (35,6%) show only incremental change, indicating that EIT Manufacturing's impact is concentrated at the programme, project and portfolio level rather than at the structural level. The attribution claim is therefore a contribution, not full attribution, as EIT Manufacturing provided critical enablers, but broader outcomes depend on national policies, corporate governance practices, and societal shifts.

[703] Ibid.
[704] Ibid.
[705] Beneficiary Women TechEU input.

Table 131. Impact attribution "Share of women scientists and engineers in manufacturing / women Board Members in Manufacturing companies /% of women-led startups /% women-led consortia in funded innovation activities"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Share of women scientists and engineers in manufacturing; Women board members in manufacturing companies; % of women-led startups in manufacturing % of women-led consortia in funded innovation activities	These KPIs collectively measure EIT Manufacturing's contribution to gender inclusion across education, leadership, entrepreneurship, and innovation activities. The logic assumes that EIT Manufacturing's targeted interventions–such as upskilling programmes, leadership initiatives, and dedicated support for women-led startups–helped accelerate progress compared to sector norms. However, systemic change remains limited, and EIT Manufacturing is just one part of a broader effort that requires structural reforms and cultural shifts.	**Contribution** – EIT Manufacturing influenced outcomes in its ecosystem, but cannot claim full attribution	**Moderate –** Based on internal monitoring (training participation, startup portfolio data, CfP records) and external sources (Eurostat, EIGE). Triangulated with qualitative evidence from the Women TechEU case study, which demonstrates EIT Manufacturing's role in fostering women's leadership and visibility in manufacturing.	**Scope limitations:** KPIs mix systemic indicators (e.g., EU-wide share of women engineers) with portfolio-level metrics, making attribution uneven. **External factors:** National gender policies, corporate governance reforms, and societal norms strongly influence outcomes. **Attribution complexity:** While EIT Manufacturing provided critical enablers, structural barriers and cultural factors remain the dominant drivers of systemic change.

4.7.3.3 European industry is the global innovation hotspot for manufacturing technology and solutions, and a core engine of societal growth

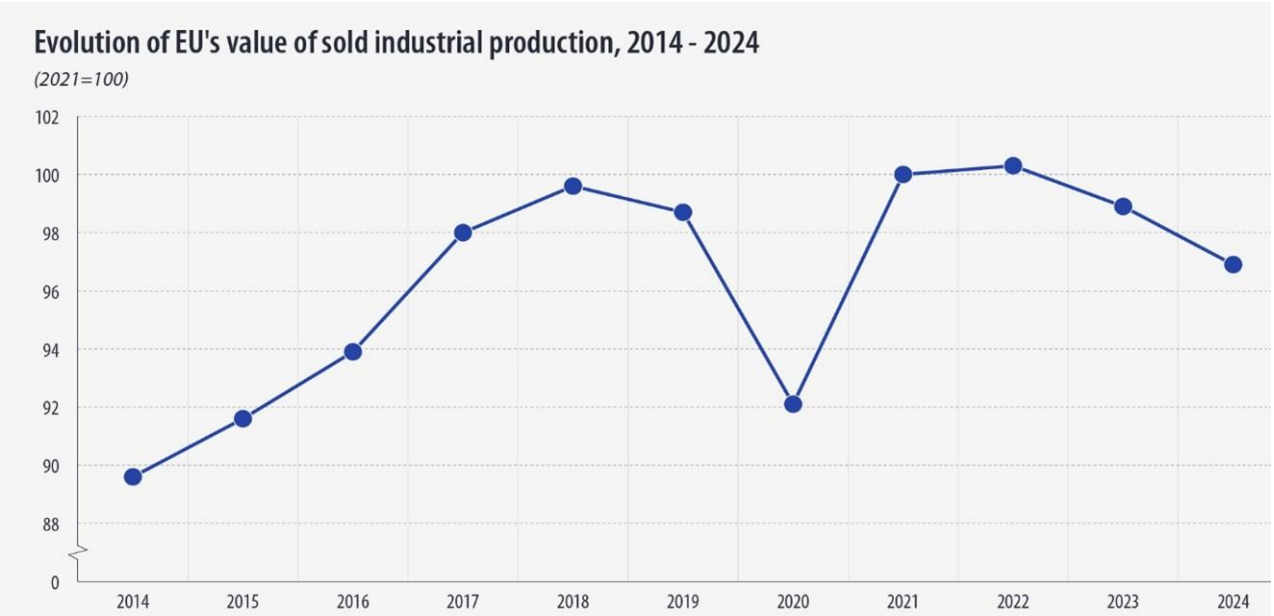
Revenue growth in manufacturing

New jobs created in supported Start-ups/Scale-ups

The European manufacturing sector remains a cornerstone of the EU economy, contributing nearly one-quarter of the EU's business economy net turnover. In 2022, the sector generated a net turnover of EUR 9,8 trillion, marking an impressive 18% increase compared to 2021.

However, recent years have seen a shift in growth dynamics. After a strong post-pandemic recovery with an 8,5% increase in production value in 2021 and a modest 0,3% rise in 2022, the sector experienced consecutive declines: a 1,4% decrease in 2023 and a further 2% drop in 2024, with the value of sold production declining to EUR 5,86 trillion in 2024.[706] These trends reflect both long-standing structural challenges and the impact of global economic uncertainties, including energy price volatility, supply chain disruptions, and geopolitical tensions (Figure 68).

Figure 68. Evolution of the EU's value of sold industrial production, 2012-2024



Source: Eurostat[707]

Despite these headwinds, innovation remains a driving force in the sector's transformation. Segments such as electrification, renewable energy infrastructure, and industrial automation have demonstrated resilience and growth, supported by increased investment in advanced technologies and digitalisation. The sector's commitment to sustainability and digital transformation is expected to underpin its future competitiveness and reinforce Europe's position as a global leader in industrial innovation.

In terms of employment, manufacturing is the largest employer among all economic sectors in the European Union. In 2022, the sector employed approximately 30 million people, accounting for 18,7% of total business economy employment. The sector is highly diverse, encompassing more than 2,2 million enterprises across the EU, from

[706] Eurostat. Database. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Industrial_production_statistics.
[707] Ibid.

small-scale traditional manufacturers to large multinational corporations. The largest manufacturing segments include food and beverages, basic metals, machinery and equipment, chemicals, and motor vehicles. While employment remains robust, the sector is undergoing transformation, with increasing demand for workers skilled in digital technologies, automation, and sustainability practices.[708]

Start-ups and scale-ups play a crucial role in driving innovation, economic growth, and employment across the European Union. According to the European Commission's Startup and Scaleup Strategy, tech start-ups across the EU have created approximately 3 million jobs over the past decade, with a total workforce reaching 3,5 million in 2024. These companies are not only engines of job creation but also pioneers of breakthrough innovations, often entering niche markets and addressing challenges that larger firms may overlook.[709]

To support this ecosystem, the EU has launched targeted actions aimed at making Europe the best place to launch and grow technology-driven companies. These efforts focus on improving access to finance, fostering innovation-friendly regulation, and attracting top talent. They are aligned with broader EU strategies such as the Competitiveness Compass, the Union of Skills, and the Savings and Investments Union–all designed to strengthen Europe's innovation ecosystem.

EIT Manufacturing is a key player in this transformation, having supported over 1 100 start-ups and scale-ups since 2020.[710]

As part of its Strategic Agenda, EIT Manufacturing envisions supporting company growth through its Business Creation pillar by offering funding, coaching, and access to industrial networks. The KIC intends to leverage complementary business-creation funding to ensure that enterprises of all sizes can participate. This is expected to include shared funding schemes with the European Fund for Strategic Investments (EFSI), the EIB, and the InvestEU instruments, as well as alignment with the Strategic Technologies for Europe Platform.

Furthermore, the KIC plans to collaborate with the EIC to enhance support for high-potential manufacturing companies. This may involve complementary activities with the EIC Accelerator, which aims at helping ventures achieve rapid scale-up and transformation, thereby strengthening Europe's manufacturing competitiveness.[711]

To strengthen European manufacturing's competitiveness and achieve the intended impact, EIT Manufacturing has developed a portfolio of innovation and business creation initiatives. Through its innovation and business creation programmes, EIT Manufacturing provides access to funding, mentorship, networking opportunities, and tailored acceleration services to help early-stage and growth-stage companies bring their solutions to market.

Examples include:

- **Venture Building Programme**: A 3-month market and investment readiness program designed for early-stage start-ups and university spin-offs. It provides expert-led workshops, mentoring, networking, and pitching opportunities. Participants gain access to corporate clients and investors through EIT Manufacturing's ecosystem and may be fast-tracked to potential investments of around EUR 150,000 via the Accelerate Call.[712]
- **Accelerate Programme**: A permanently open call that supports start-ups and scale-ups with funding (from EUR 50,000 to 500,000) and tailored services for internationalisation, financing, and go-to-market readiness. It focuses on automation and digitalisation technology for manufacturing, especially AI and

[708] Eurostat (2025). Businesses in the manufacturing sector. https://ec.europa.eu/eurostat/statistics-explained/index.php?oldid=625731.
[709] Euractiv. (2025). Startup and Scaleup Strategy: Empowering Europe's Innovation Ecosystem. https://www.euractiv.com/content/uploads/sites/2/2025/05/Euractiv-1-1.pdf.
[710] EIT Higher Education Initiative. EIT Manufacturing. Synergies with EIT Manufacturing for prospective EIT Higher Education Initiative application. https://eit-hei.eu/wp-content/uploads/2025/11/KIC-Synergies-EIT-Manufacturing-v2.pdf.
[711] EIT Manufacturing Strategic Agenda 2021-2027.
[712] EIT Manufacturing. Venture Building Programme 2025. https://www.eitmanufacturing.eu/calls/venture-building-programme-2025/.

Robotics, energy transition (decarbonisation, circular economy, carbon capture and storage, renewables, batteries, etc.) and critical components (semiconductors, quantum, advanced materials, etc.).[713]

- **BoostUp!** Competition Series: A pan-European competition to identify and support promising start-ups addressing major manufacturing challenges. In addition to providing exposure and support for selected ventures, BoostUp! events bring together investors, corporates, policymakers, and innovators to discuss current trends and opportunities in the manufacturing sector.[714]

This support has led to the launch of more than 150 new innovations, ranging from advanced robotics and digital manufacturing platforms to sustainable production technologies. The impact of these programmes extends beyond innovation alone.[715]

The following Table 132 provides an overview of the impacts achieved for KPI Revenue growth in manufacturing / # New jobs created in supported Start-ups/Scale-ups.

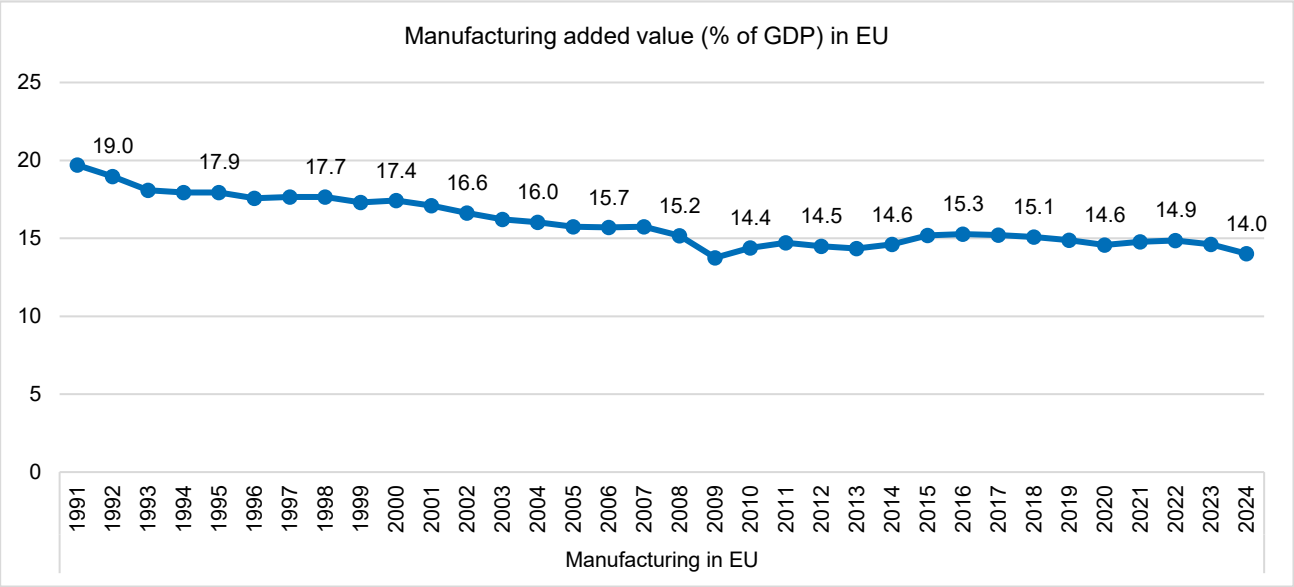
[713] EIT Manufacturing. (2024). Permanently Open Call for financial support to startups: Accelerate. https://www.eitmanufacturing.eu/calls/accelerate-2024/.
[714] EIT. (2020). EIT Manufacturing launches BoostUp! competition for ventures. https://www.eit.europa.eu/our-activities/opportunities/eit-manufacturing-launches-boostup-competition-ventures.
[715] EIT Manufacturing (2024). Innovation projects geared towards transforming manufacturing kick-off this summer. https://www.eitmanufacturing.eu/news-events/news/innovation-projects-geared-towards-transforming-manufacturing-kick-off-this-summer/.

Table 132. Revenue growth in manufacturing / # New jobs created in supported Start-ups/Scale-ups

Impact indicators	Targets	Impacts achieved
Revenue growth in manufacturing \# New jobs created in supported Start-ups/Scale-ups	22% by 2024, 36% by 2027 2 779 by 2024, 6 451 by 2027	Originally, revenue growth was to be assessed for a subset of KIC partners, benchmarked against 2020 figures, through a dedicated survey, in line with the revised Strategic Agenda. However, this specific data is currently unavailable, and the methodology for evaluating revenue growth among partners engaged with the KIC (survey data only)[716] does not allow for reporting against this KPI in accordance with the Strategic Agenda, as the relevant subset of partners has not been established, and only a qualitative assessment of partners was available. The survey findings indicate that 20% of partners traded or employed innovations (such as services, products, technologies, or business models) developed with EIT Manufacturing support. In contrast, 48% did not. Among those who did (12 responses), six reported that these innovations accounted for less than 5% of their revenue growth, while five indicated a contribution of between 5% and 10%.[717] Therefore, the previously applied metric has been retained, as reported in the 2024 impact assessment.[718] Under the former Strategic Agenda, this KPI was measured as Manufacturing Value Added (share of GDP) exceeding 16%, with a baseline of 14% in 2018, based on World Bank data.[719] The target defined in the previous agenda differs from that in the revised version. As of 2024, the target has not been met, with the indicator remaining at 14%, subject to fluctuations as illustrated in Figure 69 below.

[716] See Annex 1 for details about the survey methodology.
[717] Survey results from the survey conducted by CSIL for the purpose of the 7-year assessment (see Annex 1).
[718] EIT internal monitoring data.
[719] World Bank Group. Manufacturing, value added (% of GDP) – European Union. https://data.worldbank.org/indicator/NV.IND.MANF.ZS?locations=EU.

Figure 69. Manufacturing value-added (% of GDP) in the EU



Manufacturing Value Added (share of GDP) as of 2024

14%[720]

For the data on jobs created in ventures supported, and in accordance with the methodology outlined in Annex 2 for the Economic Impact Analysis, Dealroom data indicates that ventures supported by EIT Manufacturing show an estimated contribution of the KIC to employment creation.

This estimate accounts for existing jobs prior to the KIC's intervention and, alternatively, allows for inference on the sustainability of the jobs created. The difference between the maximum and minimum number of employees in ventures supported by EIT Manufacturing is estimated at 2 272, which is almost reaching the intended target.

New jobs created in supported Start-ups/Scale-ups 2020-2024

2 272

[720] Ibid.

While EIT Manufacturing provides strong support for ventures through funding, mentoring, and network access, it is important to recognise that external factors beyond its control can significantly hinder revenue growth. The European manufacturing sector has faced multiple systemic shocks in recent years that directly impact the performance of supported start-ups and scale-ups.

The COVID-19 pandemic triggered widespread supply chain breakdowns, including factory shutdowns, labour shortages, and transport restrictions, resulting in a 9,4% slump in EU goods exports in 2020. Even as demand recovered, firms struggled with material shortages (e.g. semiconductors), logistics disruptions, and rising costs, forcing a shift from “just-in-time” to more costly “just-in-case” inventory models.[721]

Geopolitical tensions have added further instability. The Russian invasion of Ukraine in 2022 disrupted energy supplies, cut off critical inputs, and led to sanctions that affected about a third of EU firms’ supply chains. These events accentuated Europe’s heavy dependence on foreign suppliers for essential inputs such as semiconductors, rare earths, and chemicals.[722]

At the same time, Europe’s manufacturing base has faced a historic energy shock. Natural gas and electricity prices spiked to unprecedented levels in 2021–2022, driving up input costs, fuelling inflation, and eroding competitiveness, especially for energy-intensive sectors.[723]

Taken together, these factors mean that the revenue performance of ventures supported by EIT Manufacturing cannot be assessed in isolation. Broader macroeconomic and geopolitical disruptions must be considered when contextualising results, as they create conditions that may delay or limit growth despite strong innovation potential.

[721] Eurostat. Global value chain disruptions and enterprise responses in the EU. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Global_value_chain_disruptions_and_enterprise_responses_in_the_EU.
[722] Ibid.
[723] Ibid.

Impact attribution

These indicators aim to capture EIT Manufacturing's contribution to strengthening Europe's industrial competitiveness by fostering revenue growth and job creation in innovative manufacturing ventures. The logic is that by supporting start-ups and scale-ups through funding, mentoring, and access to industrial networks, EIT Manufacturing helps accelerate business growth and employment, reinforcing Europe's position as a global innovation hub.

At the EU level, manufacturing remains a cornerstone of the economy, generating EUR 9,8 trillion in turnover in 2022 and employing nearly 32 million people. However, recent years have seen volatility: after a strong post-pandemic recovery in 2021, production value stagnated in 2022 and declined in 2023–2024 due to energy price shocks, supply chain disruptions, and geopolitical tensions. These macroeconomic headwinds have constrained revenue growth across the sector, despite resilience in innovation-driven segments such as electrification and automation.

Against this backdrop, EIT Manufacturing-supported ventures created an estimated 2 272 new jobs between 2020 and 2024, nearly reaching the 2024 target of 2 779. This is a notable achievement given the challenging economic environment and demonstrates alignment with EU objectives to boost industrial innovation and employment. However, revenue growth data remain limited: survey results show that only 20% of partners reported revenue contributions from EIT-supported innovations, and most indicated these accounted for less than 10% of growth. This suggests that while EIT Manufacturing is enabling innovation adoption, systemic revenue impacts are harder to capture and likely delayed by external shocks.

Hence, while EIT Manufacturing has made a meaningful contribution to supporting revenue growth and job creation through its entrepreneurship and innovation activities, the overall performance of the manufacturing sector and the employment dynamics in Europe result from a complex interplay of multiple programmes, policies, and market forces. Attributing the total observed growth to EIT Manufacturing alone would not be accurate, as the available data does not isolate the effects of EIT support from other factors, nor does it establish a direct causal link between EIT interventions and sector-wide outcomes.

Table 133. Impact attribution "Revenue growth in manufacturing / # New jobs created in supported Start-ups/Scale-ups"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Revenue growth in manufacturing. \# New jobs created in supported Start-ups/Scale-ups	These KPIs measure the economic impact of EIT Manufacturing's support for start-ups and scale-ups through funding, mentoring, and industrial partnerships. The logic assumes that EIT Manufacturing's interventions accelerated growth and job creation, while acknowledging that external factors, such as macroeconomic shocks and market dynamics, strongly influence outcomes.	**Contribution** – EIT Manufacturing helped ventures grow and create jobs, but cannot claim full attribution	**Moderate –** creation estimates are based on Dealroom data and internal monitoring; revenue growth insights rely on partner surveys with a limited sample size.	**Scope limitations:** Revenue growth data are incomplete and based on self-reported estimates; job creation figures reflect only EIT-supported ventures. **External factors:** Energy price volatility, supply chain disruptions, and geopolitical tensions significantly affect revenue and employment trends. **Attribution complexity:** While EIT Manufacturing provided essential support, systemic industrial growth depends on broader economic and policy conditions.

4.7.3.4 European manufacturing companies make extensive use of industrial data and digital business platforms and manage their supply chains and customers in digital eco-systems – KPI only for 2021–2024

of participating companies increasing digital maturity

Digitalisation is a transformative force in the European manufacturing sector, driving productivity, innovation, sustainability, and workforce development. It is central to the EU's industrial strategy and a key enabler of competitiveness in a rapidly evolving global landscape. Digital technologies, such as AI, the Internet of Things (IoT), robotics, and data analytics, are revolutionising manufacturing processes. These tools enable real-time monitoring, predictive maintenance, automated quality control, and flexible production systems, leading to significant gains in efficiency, customisation, and cost reduction.

According to Eurostat's 2025 edition of *Digitalisation in Europe*, the share of European enterprises reaching at least a basic level of digital intensity rose to 74% in 2024. Among these, 73% of small and medium-sized enterprises and 98% of large enterprises achieved the benchmark, highlighting both widespread progress and the persistent gap between firm sizes. The uptake of advanced digital technologies remains more limited.[724]

In 2024, 13,5% of EU enterprises with ten or more employees reported using at least one AI technology. Adoption was concentrated among larger firms, with 41% having implemented AI, compared to only 11% among smaller businesses. Cloud computing has become more mainstream, with 45,2% of all EU enterprises purchasing cloud services in 2023, again showing a clear difference between large companies (78%) and SMEs (44%).[725]

For manufacturing specifically, digitalisation is increasingly enhancing production processes, supply chains, and customer interactions. According to Eurostat, in 2021, 26% of small enterprises, 37% of medium-sized enterprises, and 48% of large enterprises in the EU utilised IoT devices in their operations, highlighting a significant adoption gradient across enterprise sizes.[726]

In 2022, Eurofound reported that approximately 16% of EU enterprises employed industrial robots, with usage concentrated in manufacturing sectors.[727] The European Commission's 2025 report indicates that digital twins and simulation technologies are gaining traction, though comprehensive adoption data remain limited. These applications contribute not only to competitiveness but also to EU objectives for sustainability and resilience.[728]

Adoption in manufacturing remains uneven, and challenges are particularly pronounced for smaller firms. Larger enterprises continue to lead in the use of AI, cloud, and advanced analytics, while SMEs often lack the financial capacity and human capital to implement such solutions at scale. The most significant barriers include shortages of digital and data skills, the high costs of investing in new technologies, difficulties with interoperability among digital systems, and concerns about cybersecurity and data governance. These constraints slow the pace of digital transformation, especially among SMEs, even though the potential benefits are clear.

Digitalisation is also closely linked to productivity gains. Digitally intensive manufacturing firms report higher value-added per employee, particularly in high-tech subsectors such as machinery, automotive, and electronics. These gains are amplified when digitalisation is combined with workforce upskilling and organisational innovation. Digital

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[724] Eurostat. (2025). Digitalisation in Europe – 2025 edition. https://ec.europa.eu/eurostat/web/interactive-publications/digitalisation-2025.
[725] Eurostat (2025). Digitalisation in Europe – 2025 edition. https://ec.europa.eu/eurostat/web/interactive-publications/digitalisation-2025.
[726] Eurostat (2022). Use of Internet of Things in enterprises. https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Use_of_Internet_of_Things_in_enterprises.
[727] Eurofound. (2024). Share of enterprises using industrial and service robots by size of enterprise, EU, 2022 (%). https://www.eurofound.europa.eu/en/surveys-and-data/data-catalogue/share-enterprises-using-industrial-and-service-b-robots-size-enterprise-2022.
[728] European Commission (2025). State of the Digital Decade 2025 report. https://digital-strategy.ec.europa.eu/en/library/state-digital-decade-2025-report?.

tools are also being deployed to support sustainability: technologies such as energy management systems, traceability platforms and blockchain, and digital twins are helping manufacturers optimise resource use, reduce emissions, and implement circular production models aligned with the EU Green Deal Industrial Plan.[729]

EIT Manufacturing plays an important role in addressing these challenges and accelerating the adoption of digitalisation in the manufacturing sector. Its activities focus on bridging the gap between technology development and market application by funding projects in areas such as robotics, AI, and digital twins. It invests in skills through training, reskilling, and upskilling programmes designed to close digital capability gaps within the workforce.

Through its RIS, EIT Manufacturing supports less connected regions to support a more balanced uptake of digital technologies across Europe. By building networks of industry, research institutions and SMEs, it fosters collaboration and scalability of solutions. In doing so, EIT Manufacturing helps translate the EU's broader digital and industrial strategies into practical impact, enabling manufacturers to innovate, remain competitive and contribute to Europe's long-term goals for sustainability and resilience.[730]

For EIT Manufacturing, digital maturity refers to the extent to which participating manufacturing companies adopt, integrate, and scale digital technologies, particularly industrial data platforms, digital business ecosystems, and supply chain/customer management systems, and evolve their practices accordingly.

One example is ShiftLabs, an EDIH (see also the section on EIT Digital above) funded by the Digital Europe Programme and Swedish regional partners. Established in 2022, ShiftLabs builds on long-standing expertise in production systems, R&D, and skills development. It operates as a national cluster with regional nodes that act as one-stop shops for SMEs, supported by universities and expert organisations.

ShiftLabs offers services covering the full digitalisation journey: from first steps with digital tools to advanced adoption of AI, Industry 4.0, supply chain digitalisation, and cybersecurity. This includes assessing companies' Digital Maturity Levels and tailoring solutions accordingly. Through EIT Manufacturing CLC North, ShiftLabs links to other European EDIHs, enhancing cross-border cooperation and knowledge exchange. It also collaborates with the IUC network, EEN, ALMI, and local science parks to expand SME access to investment opportunities.[731]

The following Table 134 provides an overview of the impacts achieved for KPI # of participating companies increasing digital maturity.

[729] European Commission (2023). Green Deal Industrial Plan. https://commission.europa.eu/document/41514677-9598-4d89-a572-abe21cb037f4_en.
[730] EIT Manufacturing (2021). Strategic Agenda 2021–2027. https://www.eitmanufacturing.eu/wp-content/uploads/2024/05/eit-manufacturing-strategic-agenda.pdf.
[731] EIT Manufacturing. European Digital Innovation Hub ShiftLabs. https://www.eitmanufacturing.eu/news-events/activities/european-digital-innovation-hub-shiftlabs.

Table 134. # of participating companies increasing digital maturity

Impact indicators	Targets	Impacts achieved
# of participating companies increasing digital maturity	80 by 2024 120 by 2027	Digital maturity is assessed through a survey coordinated by the Director of Innovation, drawing on reporting from activity leaders and evidence from participating companies, which means that the data is generated internally by the EIT Manufacturing. The assessment considers several aspects, such as: ▶ The extent of industrial data usage. ▶ Adoption of digital business platforms. ▶ Levels of investment in digital technologies.[732] This KPI is closely linked to EIT Manufacturing's mission of supporting new business creation and fostering entrepreneurship. Through its network of CLCs, EIT Manufacturing has developed synergies to support local manufacturing SMEs, helping them enhance digital maturity and strengthen their innovation capacity.[733] By the end of 2024, a total of 75 ventures were recognised for increasing their digital maturity, demonstrating tangible progress in advancing the digital transformation of European manufacturing but slightly below the target value.[734]

2020	2021	2022	2023	2024
2	15	19	14	25

[732] EIT internal monitoring data.
[733] EIT Manufacturing Three-year Interim Review of 4th Wave KICs.
[734] There is a discrepancy between the number in the internal materials of the EIT Manufacturing (75) and the internal reporting data of the EIT (106).

Impact attribution

The indicator "# of participating companies increasing digital maturity" measures EIT Manufacturing's contribution to accelerating the digital transformation of European manufacturing firms. It reflects progress in areas such as industrial data usage, adoption of digital platforms, and investment in advanced technologies, which are critical enablers for competitiveness and resilience in a rapidly evolving industrial landscape.

By 2024, 75 companies supported by EIT Manufacturing were recognised as having increased their digital maturity, slightly below the target of 80. This demonstrates tangible progress at the portfolio level, particularly in helping SMEs overcome barriers to digital adoption through funding, mentoring, and access to innovation ecosystems. These efforts align with EU priorities under the Digital Decade and the EU Industrial Strategy, both of which aim to promote widespread digitalisation across sectors.

At the EU level, digitalisation is advancing, with 74% of enterprises achieving at least a basic level of digital intensity in 2024, and strong uptake of cloud computing (45%) and IoT (26% in manufacturing). However, the adoption of advanced technologies, such as AI, remains limited (13,5% overall, 11% among SMEs), and SMEs continue to lag behind large firms in digital readiness. EIT Manufacturing's results align with these trends, but their impact is concentrated within its supported ecosystem and has not yet been observed as a structural shift across the sector.

Hence, while EIT Manufacturing has made a meaningful contribution to improving digital maturity among participating companies, the overall progress in digitalisation across European manufacturing is the result of a complex interplay of multiple programmes, policies, and market forces. Attributing systemic digital transformation solely to EIT Manufacturing would not be accurate, as the available data does not isolate the effects of EIT support from other drivers.

Table 135. Impact attribution "# of participating companies increasing digital maturity”

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# of participating companies increasing digital maturity	This indicator counts companies supported by EIT Manufacturing that improved their digital maturity through initiatives such as adopting industrial data solutions, digital platforms, or advanced technologies. The logic assumes that EIT Manufacturing’s interventions were critical enablers, but acknowledges that other factors, such as national policies, EU funding schemes, and market dynamics, also contributed.	**Contribution** – EIT Manufacturing helped companies advance digital maturity, but cannot claim full attribution	**Moderate –** Based on internal monitoring and self-assessment by participating companies, validated through activity leader reporting. However, no independent verification of digital maturity levels or long-term impact exists.	**Scope limitations:** KPI measures progress among EIT-supported companies only and does not capture systemic digitalisation trends. **External factors:** The broader adoption of digital technologies depends on EU and national policies, financial incentives, and the availability of technology. **Attribution complexity:** While EIT Manufacturing provided essential support, structural digital transformation requires coordinated action across multiple stakeholders.

4.8 EIT Urban Mobility

EIT Urban Mobility brings together city councils, companies, universities, and research centres to drive the transition toward more sustainable and liveable urban spaces. Pooling the knowledge and expertise of its partners, the community fosters an open innovation environment to tackle the complex mobility challenges faced by European cities.[735]

Its overarching vision is to become a pan-European leading force for positive change in urban mobility by 2027. Hence, this vision focuses on building a mobility system that is affordable, efficient, and accessible, while also being clean, safe, and inclusive. The KIC strives to help cities reclaim public space from cars, creating environments where people can live, work, and play in healthier, more sustainable ways.

The mission of EIT Urban Mobility is to accelerate change toward a sustainable urban mobility model. This mission is achieved by fostering collaboration across the full mobility value chain, engaging citizens and communities, and aligning innovation with cities' real needs. Activities focus on developing and deploying solutions for people's mobility, goods delivery, and waste collection, ensuring that cities are at the centre of all initiatives.

The KIC pursues five main impact goals: strengthening multimodal transport systems, expanding clean city logistics, protecting health and wellbeing, supporting green and inclusive urban design, and enabling Europe's urban mobility sector to lead the global transition. All activities ultimately contribute to three high-level societal impacts: improving quality of life in cities, mitigating and adapting to climate change, and creating jobs while strengthening Europe's mobility sector.[736] These are realised through a set of strategic objectives:

- **Create liveable urban spaces**: Reduce mobility's environmental and spatial footprint to transform cities from car-centric to people-focused. Promote innovative planning, governance, and technical solutions that improve public spaces, citizen well-being, and economic opportunities.
- **Close the knowledge gap**: Equip Europe's workforce with the skills needed for sustainable mobility and technological change. Deliver challenge-based education, strengthen higher education institutions, foster entrepreneurship, and increase women's participation in the sector.
- **Deploy and scale green, safe, and inclusive mobility solutions**: Expand access to clean, affordable, and equitable travel options while reducing private car use. Support active travel, shared mobility, and improved public transport, while mobilising investment in sustainable infrastructure and first/last-mile solutions.
- **Accelerate market opportunities**: Boost Europe's competitiveness by fostering an entrepreneurial ecosystem for start-ups, SMEs, and established players. Support the creation, testing, and scaling of innovative products and services that generate green jobs and sustainable growth.
- **Promote effective policies and behavioural change**: Create a supportive regulatory and societal environment for sustainable mobility. Strengthen collaboration among stakeholders, enhance citizen acceptance, and equip cities to monitor, assess, and scale effective solutions.[737]

The Strategic Agenda defines the main ways to achieve the headline impacts targeted for 2027 and details approaches that will guide progress toward these goals. Strategic Objectives set out in the Strategic Agenda and the impact KPIs of the EIT Impact Framework are detailed in the table in Annex 3.

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[735] EIT Urban Mobility Strategic Agenda 2021-2027.
[736] Ibid.
[737] Ibid.

4.8.1 Impact pathway

The following diagram presents the ToC developed based on EIT Urban Mobility's Strategic Agenda 2021–2027, with particular reference to Annex I, which outlines the societal challenges, strategic objectives, and expected impacts.

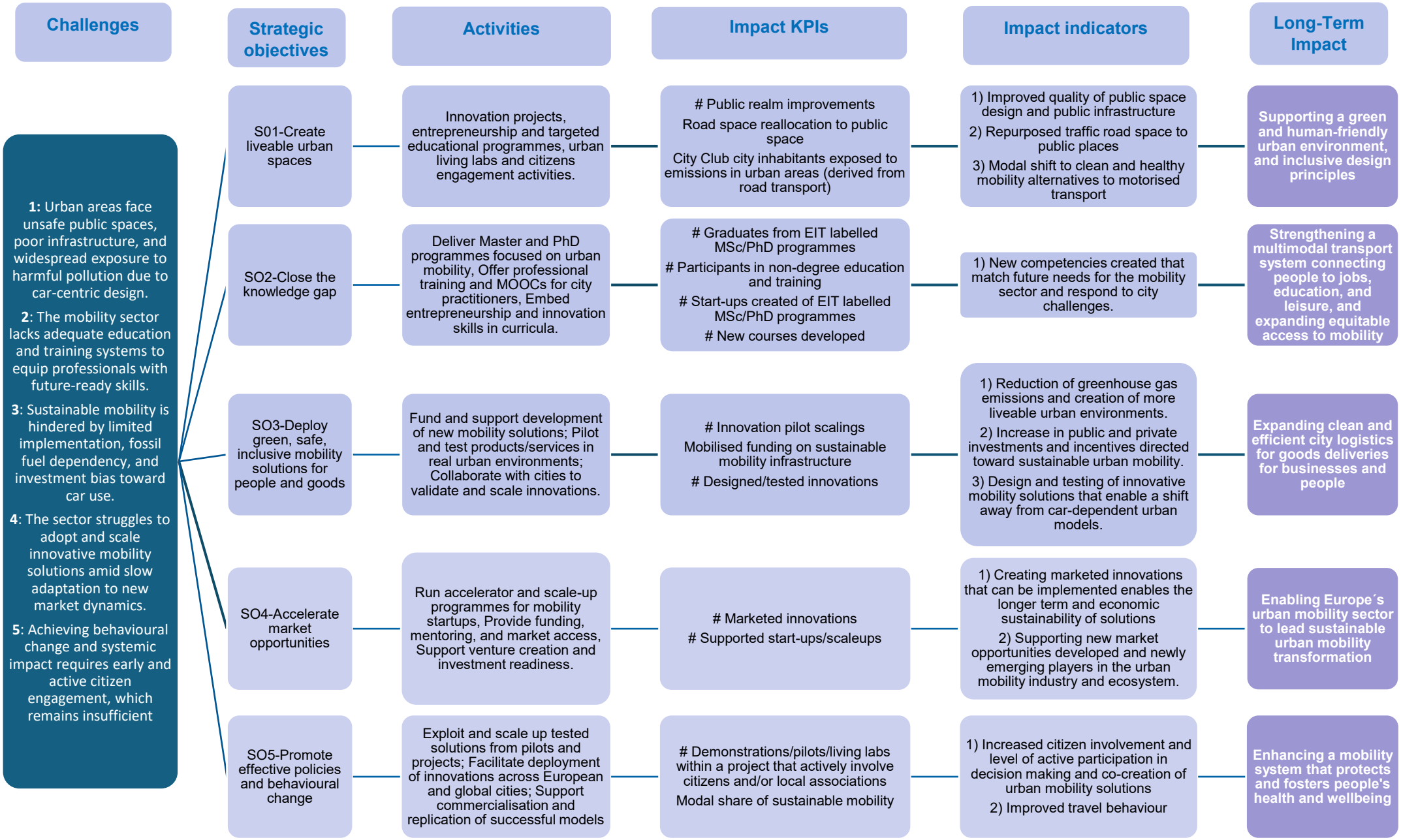
The pathway captures the five core Strategic Objectives (SO1–SO5) and links them to the key challenges identified in the Agenda. Each objective is supported by targeted activities and programmes, such as City Club, Academy, Innovation, and Impact Ventures[738], which collectively aim to drive systemic change in urban mobility.

The pathway also reflects the intended long-term impacts, including improved public spaces, reduced emissions, enhanced skills and innovation uptake, and stronger citizen participation in shaping mobility solutions.

This framework provides a clear and structured view of how EIT Urban Mobility contributes to the EU's Cities Mission and broader sustainability goals.

[738] This activity, currently called Impact ventures, was called Business Creation in the Strategic Agenda.

Figure 70. EIT Urban Mobility impact pathway



4.8.2 Overview of the main achievements

Key achievements[739]

- ✓ **175 innovations launched on the market in the period 2020-2024; 108 start-ups were created from innovation projects and by students of EIT-labelled programmes.**
- ✓ **188 innovations tested and 65 pilot projects scaled up by 2024; 159 demonstration projects and living labs implemented in the period 2021-2023.**
- ✓ **1 117 supported ventures (start-ups or scale-ups) which attracted over EUR 168 million in investments.**
- ✓ **Number of graduates from EIT-labelled programmes reached 631, among which 102 have graduated from Master's and Doctoral degrees; non-labelled training exceeded expectations, with over 36 000 professionals trained.**
- ✓ **EIT Urban Mobility's solutions contributed to an estimated reduction of 10 027 tons of greenhouse gas emissions.**
- ✓ **The partnership network grew from 132 members in 2020 to 523 by 2024, including over 50 European cities.**

EIT Urban Mobility, established in 2019 as part of the fourth wave of EIT KICs, aims to drive innovation and transformation in urban mobility across Europe. Supported by a EUR 282 million EIT grant for 2020–2025, the KIC has rapidly developed a pan-European network, launched impactful projects, and exceeded many of its targets in innovation, business creation, and education.

Between 2020 and 2024, the KIC successfully launched a total of 175 innovations to market, significantly surpassing its initial target. Among these innovations are solutions like solar-powered micromobility docking stations and solar-charging battery services, which are supporting intermodality in cities such as Milan, Toulouse, and Madrid.

Thanks to KIC support, 188 innovations were designed or tested overall, with 65 pilot projects scaled up by 2024, moving steadily toward a target of 39 by 2024. Additionally, between 2021 and 2023, EIT Urban Mobility implemented 159 demonstrations, pilots, and living labs, actively involving citizens and local associations in the process.

EIT Urban Mobility has also made significant progress in supporting start-ups and scale-ups. From 2020 to 2024, the KIC provided assistance to 1 117 start-ups. These start-ups are distributed across Europe, including Horizon Europe-associated and third countries. The supported start-ups collectively attracted over EUR 168 million in investment during this time, significantly outperforming the 2021-24 target of EUR 25,5 million.

[739] The following section is based on the internal monitoring data of the EIT as well as on the Annexes to European Commission, Interim Evaluation of the Horizon Europe Framework Programme for Research and Innovation (2021 - 2024). Accompanying the document Communication from the Commission to the European Parliament and the Council Horizon Europe: Research and Innovation at the heart of competitiveness, SWD(2025) 110 final, Brussels, 30.4.2025; The overview of the core KPIs is provided in the Annex 4.

According to Dealroom data, EIT Urban Mobility was recognised as the top investor in European mobility start-ups. The KIC witnessed the creation of 80 start-ups from innovation projects, while 278 additional start-ups emerged from EIT-labelled MSc and PhD programmes, aligning with the interim goals.

In the realm of education and skills development, EIT Urban Mobility established two pan-European Master's programmes, with a third set launched in 2024, along with a Doctoral Training Network and a Competence Hub aimed at professional upskilling. The number of graduates from EIT-labelled programmes reached 631 by 2024 of which 102 are Master's and PhD graduates. Non-labelled training exceeded expectations, with over 36 000 professionals trained compared to a target of 15 500. Additionally, they developed over 150 new courses between 2021 and 2023.

The partnership network of EIT Urban Mobility grew from 132 members in 2020 to 523 by 2024. This network includes over 50 European cities and a growing share of SMEs, which are expected to constitute 53% of active partners by 2024. The KIC spans five regional Innovation Hubs located in Barcelona, Munich, Amsterdam, Prague, and Copenhagen, along with RIS Hubs that extend its reach across Europe, including associated and third countries. EIT Urban Mobility also participates in global outreach programmes and has opened innovation hubs in North Macedonia, Ukraine, Montenegro, Croatia (covering also Bosnia and Herzegovina and Slovenia), Greece (covering also Cyprus), Malta, Latvia, Lithuania, Poland, Portugal, Romania, Slovakia and Türkiye to strengthen its international positioning.

From a financial perspective, EIT Urban Mobility demonstrated a strong leverage factor, attracting EUR 1,3 in external investment for every EUR of EIT funding. The KIC has begun to generate revenue from services, consultancy, education, and equity in start-ups, with 168 equity shareholdings valued at EUR 7 million by the end of 2024. Moreover, the reforms implemented have transitioned the funding model from "grant for fee" to "services for fee," and from "funder" to "impact investor," thereby supporting long-term financial independence.

EIT Urban Mobility's activities are closely aligned with critical EU policies, including the European Green Deal, Horizon Europe, and the Sustainable and Smart Mobility Strategy, thereby contributing to the development of climate-neutral, inclusive, and resilient urban mobility systems. Furthermore, KIC collaborates with other KICs, the European Innovation Council, and city initiatives like CIVITAS and Net Zero Cities, enhancing its impact through joint projects and knowledge sharing.

EIT Urban Mobility maintains an open partnership model, where membership and funding calls are fully transparent, supported by clear processes and external expert involvement in project selection. The share of SMEs among partners and grant recipients has grown significantly, with EUR 47 million in grants budgeted for SMEs by 2025.

Despite these achievements, EIT Urban Mobility has encountered challenges and areas for improvement. Graduation rates from degree programmes remain below targets, partly due to the disruptions caused by the pandemic, and the scaling up of innovation pilots and public realm improvements is lagging behind the ambitious targets set. Nevertheless, progress is ongoing as the KIC continues to drive innovation and impact in urban mobility.

In its first five years, EIT Urban Mobility has rapidly built a robust pan-European ecosystem, exceeded targets in innovation and start-up support, and delivered measurable impacts in sustainable urban mobility. While challenges remain in education outcomes and scaling certain pilots, the KIC is on track to achieve long-term societal, economic, and environmental goals and is progressing towards financial sustainability and deeper integration with EU policy objectives.

4.8.3 Selection of societal impacts

The selection of societal impact indicators for EIT Urban Mobility follows the overarching methodology established in the EIT Impact Framework, ensuring alignment with both the KIC's strategic objectives and the broader goals of Horizon Europe. The indicators chosen reflect a pragmatic balance between the priorities set out in EIT Urban Mobility's Strategic Agenda and the availability and reliability of data, as discussed in workshops and through internal monitoring processes. The assessment relies primarily on internally collected and self-assessed data, complemented where possible by external sources and stakeholder feedback.

In line with the approach applied across the report, the selected indicators focus on those areas where EIT Urban Mobility is expected to deliver the greatest societal value, such as the creation of liveable urban spaces, the deployment of sustainable mobility solutions, and the active involvement of citizens in shaping urban mobility. The following analysis should therefore be interpreted within this context, recognising both the strengths and limitations of the available evidence, and the sector-specific challenges inherent to measuring systemic change.

4.8.3.1 New competencies created that match future needs for the mobility sector and respond to city challenges

New courses developed

This KPI measures the number of new education or training courses developed with EIT support. It should be complemented with indicators assessing their relevance and contribution to addressing labour-market needs and skill shortages in priority sectors.

The mobility sector across Europe is undergoing a rapid transformation driven by digitalisation, sustainability goals, and changing urban dynamics. However, this evolution is hindered by significant skill gaps and workforce shortages, which are increasingly recognised as critical barriers to the sector's ability to deliver on climate, accessibility, and innovation goals.

Labour and skills shortages have been rising across all EU Member States for nearly a decade, affecting both frontline operational roles (such as drivers and technicians) and strategic and technical roles in urban mobility planning, innovation, and digitalisation. These shortages are driven by demographic changes, most notably an ageing workforce, as well as the growing demand for new skills linked to technological advancements and the green and digital transitions. Persistent challenges related to working conditions, such as low wages and limited work-life balance, further exacerbate recruitment and retention difficulties in operational roles.[740]

The transport sector, including public transport, is facing an acute labour shortage. According to the International Road Transport Union (IRU), the number of unfilled bus and coach driver positions in Europe reached 105 000 in 2023, representing 10% of total demand. This marks a 54% increase compared to the previous year, and the shortage is projected to more than double by 2028 if no corrective action is taken.[741]

The 2022 EURES Labour Shortages Report confirms this trend, identifying bus and tram drivers as shortage occupations in 14 EU Member States, with half of those countries categorising the shortage as "severe". The issue is compounded by demographic challenges: only 3% of bus and coach drivers in Europe are under 25, while a

[740] European Commission (2024). Labour shortages in transport. https://transport.ec.europa.eu/transport-themes/social-issues-equality-and-attractiveness-transport-sector/social-issues/labour-shortages-transport_en.
[741] International Road Transport Union (2022). Europe's driver shortage to triple by 2026 if no action. https://www.iru.org/news-resources/newsroom/europe-driver-shortage-triple-2026-if-no-action-new-iru-report.

significant proportion are nearing retirement. The profession also suffers from low women participation, with women making up just 16% of bus and coach drivers, well below the EU average for the transport sector[742,743]

In parallel, the evolving nature of urban mobility, driven by digitalisation, sustainability, and changing user expectations, is creating demand for hybrid skill sets in planning, policy, and innovation roles. These roles require a combination of technical expertise, digital literacy, environmental awareness, and stakeholder engagement capabilities.

This labour crisis directly threatens cities' ability to deliver on key policy goals, including decarbonisation, accessibility, and resilience. As cities expand and modernise their public transport networks, the challenge of recruiting and retaining qualified staff becomes increasingly urgent. Without targeted interventions, service disruptions and delays will become more frequent, undermining public trust and slowing progress toward climate and equity objectives.[744]

In response to the growing skills and labour shortages in the mobility sector, European institutions and initiatives, including EIT Urban Mobility, are actively developing new competencies and training programmes to address these gaps. These efforts go beyond simply filling vacancies, and they aim to reshape the workforce to meet the future needs of the mobility sector and to respond effectively to the complex challenges faced by cities, such as decarbonisation, digitalisation, and inclusivity.

EIT Urban Mobility is instrumental in this transformation through its Academy programme area[745], which offers a comprehensive portfolio of educational programmes ranging from Master's degrees and doctoral training to professional upskilling and applied learning. Its flagship platform, Urban Mobility Explained (UMX)[746] provides more than 50 free online courses tailored to urban mobility professionals. These courses cover a wide range of topics, including Mobility-as-a-Service, sustainable logistics, public transport fundamentals, AI in mobility, and inclusive planning for ageing populations.

In parallel, the EIT Urban Mobility Master School offers joint degree programmes in collaboration with leading European universities, focusing on sustainable urban mobility transitions, smart mobility data science, and business engineering. These programmes integrate innovation, entrepreneurship, and challenge-based learning to prepare graduates for leadership roles in the sector. Hence, EIT equips professionals with the skills needed to navigate an evolving mobility landscape. As such EIT Urban Mobility is directly contributing to the creation of new competencies that match future needs and respond to the pressing challenges faced by European cities.[747]

The following Table 136 provides an overview of the impacts achieved for KPI # New courses developed.

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[742] Expert Group on Urban Mobility (EGUM). (2024) Recommendations of the Passenger Transport Subgroup – Topic 4B: Citizen engagement. https://transport.ec.europa.eu/document/download/eb3bef7d-ce8d-4f7a-a8d5-05eae1070691_en?filename=EGUM%20Recommendations_PT%20Subgroup_Topic%204B.pdf.
[743] International Road Transport Union (IRU). (2023). Driver Shortage Report 2023 Passenger: https://www.iru.org/intelligence/road-transport-intelligence/driver-shortage-report-2023-passenger-europe-executive-summary
[744] European Commission (2024). European Commission publishes report on labour shortages in the transport sector. https://urban-mobility-observatory.transport.ec.europa.eu/news-events/news/european-commission-publishes-report-labour-shortages-transport-sector-2024-11-19_en.
[745] EIT Urban Mobility Strategic Agenda 2021-2027.
[746] EIT Urban Mobility. Professional training. https://www.eiturbanmobility.eu/professional-training/.
[747] EIT Urban Mobility. Master's programmes. https://www.eiturbanmobility.eu/what-we-offer/education-and-training/masters-programmes/.

Table 136. # New courses developed

Impact indicators	Targets	Impacts achieved
# New courses developed	70 by 2024 150 by 2027	The target set for the number of courses developed was not only achieved but has already matched the goal intended for 2027. Within this number, for example, the Urban Mobility Courses available on the EIT Campus include 59 courses, 48 of which are offered free of charge, and 3 of which carry the EIT Label.[748] **By 2024** 150[749] A particularly successful initiative has been Urban Mobility Explained (UMX, introduced above), which combines online courses with short video content to make knowledge on sustainable mobility widely accessible. By 2024, more than 32 000 learners had enrolled in UMX courses, and the UMX YouTube channel had attracted over 4,7 million views, reflecting strong outreach and engagement.[750]

[748] EIT Campus. Urban Mobility Courses. https://eit-campus.eu/courses/topic/urban-mobility.
[749] EIT internal monitoring data.
[750] EIT Urban Mobility. (2024). EIT Urban Mobility highlights report 2024. https://www.eiturbanmobility.eu/wp-content/uploads/2024/12/EXT_EIT-Urban-Mobility-Highlights-Report-2024_Digital.pdf.

Impact attribution

The indicator "# New courses developed" directly measures EIT Urban Mobility's contribution to creating new competencies for the mobility sector. It reflects the KIC's role in addressing critical skill gaps caused by rapid technological change, sustainability imperatives, and demographic challenges in urban transport systems. By developing new courses, EIT Urban Mobility equips professionals with the knowledge and skills necessary to address city challenges such as decarbonization, digitalisation, and inclusivity.

By 2024, EIT Urban Mobility had already reached 150 new courses, meeting the 2027 target three years ahead of schedule. This demonstrates strong alignment with EU priorities for workforce transformation under the European Skills Agenda and the Green Deal Industrial Plan. These results indicate that EIT Urban Mobility is moving in the same direction as EU efforts to close skills gaps in transport and mobility.

Because this KPI is an input indicator, the attribution claim is direct, as the courses developed are fully attributable to EIT Urban Mobility's actions. However, the KPI does not measure the depth of learning, long-term employability outcomes, or systemic impact on labour shortages. These broader outcomes depend on multiple factors, including national education systems, industry demand, and policy frameworks.

Table 137. Impact attribution "# New courses developed"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# New courses developed	This indicator counts the number of new courses created under EIT Urban Mobility's Academy programme to address future skill needs in the mobility sector. The logic assumes that these courses directly result from EIT Urban Mobility's interventions, as they are designed, funded, and delivered by the KIC and its partners.	**Direct attribution –** input indicator (courses developed are fully attributable to EIT Urban Mobility)	**High –** Based on internal monitoring and validated through the EIT Campus platform and programme records. Data includes course type, delivery format, and enrolment figures.	**Scope limitations:** The indicator measures the number of courses, not the quality, depth of learning, or long-term employability outcomes. **External factors:** Systemic labour shortages and skill gaps depend on broader education systems, industry demand, and policy frameworks.

4.8.3.2 Reduced CO2 emissions and liveable urban areas created through the implementation and scaling of solutions

Innovation pilot scalings

Urbanisation is both a challenge and an opportunity in Europe's climate transition. With over 75% of EU citizens living in urban areas, cities are responsible for approximately 70–80% of the EU's total GHG emissions, with transport contributing a large share of these emissions. Urban mobility alone generates about 23% of all transport-related GHG emissions, making it a critical area for intervention, as cities are under pressure to decarbonise.[751,752]

Despite ambitious EU climate targets, including a 55% reduction in GHG emissions by 2030 and climate neutrality by 2050, the transport sector remains a key concern. In 2022, transport (including international aviation and shipping) accounted for approximately 28,9% of all EU-27 GHG emissions (1 044 $MtCO_2e$). Transport emissions increased by 25,9% between 1990 and 2022, making it the only major sector where emissions have risen over the past three decades. This trend is closely linked to urbanisation: as cities grow, so does the demand for mobility, leading to higher energy consumption and emissions unless mitigated by sustainable solutions.[753]

However, urban areas also offer unique opportunities for decarbonisation. Higher population density enables more efficient public transport, active mobility, and shared mobility services. While the sector has seen increased deployment of electric vehicles and other low-emission solutions, overall transport emissions have not significantly decreased since 2005. Preliminary estimates for 2023 indicate a modest drop of 0,8% compared with 2022, but sustained and accelerated action is needed to achieve the EU's climate goals.[754]

In this context, EIT Urban Mobility is a driving force by supporting cities in implementing and scaling innovative mobility solutions that reduce emissions and improve urban liveability. Through its innovation programmes, EIT Urban Mobility has launched and scaled numerous pilot projects across Europe, targeting areas such as zero-emission logistics, electrified public transport, multimodal hubs, and smart mobility platforms. These pilots are designed not only to test new technologies but to be replicated and expanded across cities and regions.

The impact of these efforts is captured through the indicator "innovation pilot scaling", defined as the number of innovation products, solutions and/or services scaled by expanding or replicating pilot or small-scale projects to reach more people and/or broaden the effectiveness of an intervention.

One of the key mechanisms supporting this scaling process is the RAPTOR programme[755], which enables cities to rapidly test and deploy targeted mobility solutions. Through RAPTOR, multiple pilots are co-developed with cities and solution providers, with the explicit aim of scaling successful interventions across different urban contexts in Europe.

EIT Urban Mobility operates within a broader ecosystem of European institutions and funding programmes driving urban mobility innovation. The EIB is a major financier, providing loans and technical assistance for sustainable urban transport projects, including large-scale investments in zero-emission fleets, digitalisation, and energy efficiency. The European Commission, through programmes such as Horizon Europe and the EU Mission for 100

[751] European Commission, 2025. JRC Highlights Report 2024 – From Science to Impact. https://publications.jrc.ec.europa.eu/repository/handle/JRC141578.
[752] European Commission, 2024. Sustainable Urban Mobility. https://transport.ec.europa.eu/transport-themes/urban-transport/sustainable-urban-mobility_en.
[753] European Environment Agency (EEA), 2024. Sustainability of Europe's Mobility Systems. https://www.eea.europa.eu/en/analysis/publications/sustainability-of-europes-mobility-systems/climate.
[754] European Environment Agency (EEA), 2024. Greenhouse Gas Emissions from Transport. https://www.eea.europa.eu/en/analysis/indicators/greenhouse-gas-emissions-from-transport.
[755] EIT Urban Mobility. (2024). RAPTOR 2025 Open Call. https://www.eiturbanmobility.eu/call-for-proposals/raptor-2025-open-call/.

Climate-Neutral and Smart Cities by 2030, offers strategic guidance, technical support, and funding to accelerate the transition to climate-neutral, liveable urban areas.

The KPI on innovation pilot scalings is directly connected with Strategic Objective 3 – *Deploy and scale green, safe, and inclusive mobility solutions for people and goods*. This strategic objective seeks to support the fundamental right of mobility for all by fostering the deployment of novel mobility solutions designed around people's needs, reducing reliance on private car use, and offering access to clean, safe, affordable, and equitable travel options.[756]

In parallel, SO3 addresses air quality and public health concerns by promoting active travel, improving public transport user experience, and expanding shared mobility schemes.[757] EIT Urban Mobility aims to achieve this by mobilising public and private investments in sustainable infrastructure, supporting modal shifts, and enabling integrated urban transport and logistics chains, including bridging the first and last mile.[758]

The following Table 138 provides an overview of the impacts achieved for KPI # Innovation pilot scalings.

[756] EIT Urban Mobility Strategic Agenda 2021-2027.
[757] Ibid.
[758] Ibid.

Table 138. # Innovation pilot scalings

Impact indicators	Targets	Impacts achieved
# Innovation pilot scalings	39 by 2024 72 by 2027	The dedicated KPI KSN01 – Innovation Pilot Scaling measures the number of innovation products and/or processes that have completed testing or end-user demonstrations and are ready for scaling. Scaling is defined as either expanding an innovation to a wider application within the same location (reaching more people) or introducing it in a new location. In this context, an innovation is defined as "an idea, practice, or object that is perceived as new by an individual or other unit of adoption in the place where it is implemented." EIT Urban Mobility tracks this KPI across a range of solution types. Innovations supported under this indicator are expected to: ▶ Improve the user experience for people across individual mobility, public transport, and shared mobility. ▶ Optimise and improve city logistics, with particular focus on last-mile deliveries. ▶ Engage citizens and stakeholders to stimulate behavioural change and accelerate the adoption of sustainable mobility solutions, including the necessary regulatory adjustments.[759] EIT Urban Mobility achieved and surpass the target set for 2024 by scaling up 65 innovations by 2024.[760]

2021	2022	2023	2024
6	10	1	48[761]

[759] EIT Urban Mobility. ANNEX 4 - List of EIT Urban Mobility Key Performance Indicators (KPIs). https://www.eiturbanmobility.eu/wp-content/uploads/2021/05/Annex4_List-of-KPIs-1.pdf.
[760] EIT internal monitoring data.
[761] EIT Urban Mobility internal data.

Impact attribution

The indicator "# Innovation pilot scalings" measures EIT Urban Mobility's contribution to accelerating the deployment and replication of innovative mobility solutions across European cities. Scaling is defined as expanding a pilot to a broader application within the same location or replicating it in a new location, thereby increasing its reach and impact. This indicator is crucial for achieving the overarching objective of reducing transport-related emissions, enhancing urban liveability, and promoting inclusive mobility systems.

By 2024, EIT Urban Mobility scaled 65 innovations, surpassing the target of 39 and demonstrating strong portfolio-level progress. These solutions include zero-emission logistics, electrified public transportation, multimodal hubs, and smart mobility platforms. Programmes such as RAPTOR have been instrumental in enabling rapid prototyping and scaling of solutions in collaboration with cities and industry partners.

At the EU level, transport remains the only major sector where emissions have increased since 1990, accounting for 28,9% of total GHG emissions in 2022. Within this, urban transportation is responsible for about 23% of transport-related emissions. Despite incremental progress, such as modest emission reductions in 2023 and growing adoption of electric vehicles, systemic decarbonisation remains slow.

Against this backdrop, EIT Urban Mobility's results are moving in the right direction by accelerating the uptake of sustainable mobility solutions. However, the ability to scale these innovations is also strongly influenced by external factors, including municipal policies, regulatory frameworks, co-investment from public and private actors, and alignment with EU-level initiatives such as the Mission for 100 Climate-Neutral and Smart Cities. These factors create enabling conditions that complement EIT Urban Mobility's efforts and are crucial for achieving a significant impact.

Hence, while EIT Urban Mobility has made a meaningful contribution to scaling innovative solutions that support decarbonisation and modal shift, the overall progress in reducing transport emissions and transforming urban mobility systems depends on a complex interplay of multiple programmes, policies, and market forces. Attributing systemic outcomes to EIT Urban Mobility alone would not be accurate, as the available data does not isolate the effects of EIT support from other drivers.

Table 139. Impact attribution "# Innovation pilot scalings"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# Innovation pilot scalings	This indicator counts the number of innovations supported by EIT Urban Mobility that have moved beyond the pilot stage to wider application or replication. The logic assumes that EIT Urban Mobility's interventions – funding, technical support, and city-industry partnerships – were critical enablers, but acknowledges that broader scaling depends on municipal policies, regulatory frameworks, and co-investment.	**Contribution** – EIT Urban Mobility enabled scaling, but cannot claim full attribution.	**Moderate –** Based on internal monitoring and activity leader reporting, validated through project documentation. However, no independent verification of long-term adoption or impact on emissions exists.	**Scope limitations:** KPI measures the number of scaled innovations but does not capture their geographic reach, user adoption, or quantified environmental benefits. **External factors:** Scaling success depends on city-level regulations, funding availability, and political priorities. **Attribution complexity:** While EIT Urban Mobility provided essential support, systemic decarbonisation and modal shift require coordinated action across multiple stakeholders and policy frameworks.

4.8.3.3 Increased share of public-private investments and incentives for sustainable urban mobility measures and services

Mobilised funding on sustainable mobility infrastructure

Europe's transition to sustainable urban mobility is underpinned by a rapidly growing investment landscape. Recent estimates show that achieving the EU's Green Deal targets for urban mobility will require at least EUR 1,5 trillion in investments from public and private sources by 2050, with EUR 500 billion specifically needed for implementing and managing sustainable mobility measures. This reflects the scale of transformation required across European cities, including infrastructure upgrades, fleet renewals, digitalisation, and the expansion of shared and active mobility services.[762]

Public investment remains the backbone of this transition. For example, the European Commission allocated EUR 7 billion in grants to 134 transport projects under the Connecting Europe Facility (CEF), with around 83% of this funding supporting projects that deliver on the EU's climate objectives.[763]

National RRFs have also mobilised nearly EUR 83 billion for smart and sustainable transport, with Italy, Spain, and Germany accounting for over 60% of this total.[764] Ensuring that funding reaches a diverse range of cities and stakeholders across Europe remains a key priority.

At the same time, the transport sector and sustainable mobility are also attracting growing private R&I investment. The shift toward zero-emission transport is driving significant private R&I investment across Europe's mobility and automotive sectors. According to the European Investment Bank (EIB), 61% of EU firms have already invested in climate mitigation or adaptation measures – up from 56% in 2023 and 53% in 2022.[765]

This upward trend reflects growing confidence in the sector and the increasing attractiveness of sustainable mobility as an investment domain. Emerging mechanisms such as blended finance and green bonds are further expanding the investment landscape. However, unlocking the full potential of private capital requires regulatory clarity and streamlined public-private investment structures. Barriers such as fragmented funding mechanisms, complex permitting processes, and inconsistent local policies continue to limit the scalability of private-sector-led solutions.

Within this evolving landscape, EIT Urban Mobility plays a catalytic role. As both an innovation community and an impact investor, it supports the development and scaling of sustainable mobility solutions across Europe. Through its activities, EIT Urban Mobility recognises the persistent challenge of disproportionate public and private investment in motorised individual transport and car-oriented infrastructure, compared to the relatively modest funding directed toward sustainable modes such as walking, cycling, public transport, shared mobility, and pooling. This imbalance continues to hinder the transition toward more sustainable, inclusive, and resilient urban mobility systems.

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[762] EIT Urban Mobility, 2024. Costs and Benefits of the Urban Mobility Transition – 2nd Edition. https://www.eiturbanmobility.eu/knowledge-hub/costs-and-benefits-of-the-urban-mobility-transition-2nd-edition-october-2024/.
[763] European Commission, 2024. EU invests record €7 billion in sustainable, safe and smart transport infrastructure. https://transport.ec.europa.eu/news-events/news/eu-invests-record-eu7-billion-sustainable-safe-and-smart-transport-infrastructure-2024-07-17_en.
[764] European Parliament, 2025. Smart and Sustainable Transport Investments in the National Recovery and Resilience Plans. https://www.europarl.europa.eu/RegData/etudes/BRIE/2025/775883/EPRS_BRI%282025%29775883_EN.pdf.
[765] European Investment Bank (EIB), 2024. EIB Investment Survey 2024: More than 60% of European companies have invested in climate mitigation and adaptation and more than 70% in their digital transformation. https://www.eib.org/en/press/all/2024-386-eib-investment-survey-2024-more-than-60-of-european-companies-have-invested-in-climate-mitigation-and-adaptation-and-more-than-70-in-their-digital-transformation.

To address this gap, EIT Urban Mobility applies an approach that combines attracting, coordinating, and deploying financing for sustainable mobility infrastructure and innovation projects across Europe. Its funding strategy rests on three pillars:

- Internal mechanisms, including seed and equity investments in start-ups and SMEs, as well as co-funding of innovation and demonstration projects.
- Instruments for co-investment, enabling risk-sharing and scaling by bringing together cities, companies, and other partners in joint projects.
- Support in securing external financing, helping partners access EU programmes, national schemes, and private capital to increase leverage and impact.

The impact of these efforts is captured through the indicator “Mobilised funding on sustainable mobility infrastructure”, defined as the amount of non-EIT funding attracted for sustainable urban mobility measures and services. This indicator reflects the ability of KIC-supported consortia and partners to leverage public and private investments aligned with EIT Urban Mobility’s strategic objectives. It also signals a shift in investment priorities – away from individual motorised transport and toward inclusive, low-emission, and multimodal mobility solutions. This indicator supports ongoing monitoring of how effectively EIT Urban Mobility and its partners are catalysing systemic change through financial leverage.

Table 140. Mobilised funding on sustainable mobility infrastructure

Impact indicators	Targets	Impacts achieved
Mobilised funding on sustainable mobility infrastructure	EUR 30 million by 2024 EUR 75 million by 2027	Since its inception in 2021, EIT Urban Mobility has helped over 100 start-ups secure more than EUR 40 million in capital, and its investment arm targets 10–20 ventures per year, with initial investments of up to EUR 2 million per company. According to the State of European Mobility Startups report (2024), EIT Urban Mobility has become the leading investor in the European mobility sector, not only providing direct funding but also offering grants, accelerator support, and access to a pan-European network of cities, corporates, and investors[766]/ By 2024, the EIT Urban Mobility secured and mobilised EUR 29 million, almost reaching the target value. **By 2024** EUR 29 million[767]

[766] EIT Urban Mobility, 2025. EIT Urban Mobility is Europe's Most Active Mobility Investor. Available at:https://www.eiturbanmobility.eu/eit-urban-mobility-is-europes-most-active-mobility-investor/.
[767] EIT internal monitoring data.

Case study: NetZeroCities (NZC-SGA1 & NZC-SGA2)

Initiative highlights

NetZeroCities is accelerating the transition to climate neutrality for over 100 European cities by 2030, leveraging EIT Urban Mobility's expertise in sustainable urban transport and innovation. Through its NZC-SGA1 and NZC-SGA2 phases, the initiative has driven systemic change by fostering collaboration, piloting innovative solutions, and strengthening local innovation ecosystems across diverse regions.[768]

Coordinated by Climate-KIC (see section 4.1 EIT Climate-KIC for details), the initiative brings together a wide range of partners, including EIT Urban Mobility, which contributes in areas such as transport, innovation, and city engagement.[769] Launched in October 2021, NetZeroCities operates across more than 100 cities in Europe, including both Mission Cities and Mission-minded cities, with activities spanning regions such as Cyprus, Slovenia and Finland.[770]

NZC-SGA1 marked the initial implementation phase of the Cities Mission Platform, focusing on creating a "one-stop shop" for cities to access technical support, develop Climate City Contracts (CCCs) and pilot climate-neutral solutions. It provided tailored investment planning and emissions analysis to help cities define and commit to their climate neutrality pathways.[771]

In contrast, NZC-SGA2 builds on this foundation by scaling and reinforcing the platform's operations through 2027. It expands support to additional cities, including those not formally part of the Mission, and deepens systemic change efforts by offering mentoring, capacity-building, and policy-innovation services.[772]

The initiative addresses the urgent societal challenge of climate change by tackling the structural, institutional, and behavioural challenges of climate neutrality, employing a transversal approach that encompasses governance, citizen engagement, and financial planning. Key impacts include the creation of climate city contracts, pilot funding for innovative solutions, capacity-building, and knowledge-transfer programmes.

Notable outcomes are increased stakeholder engagement (e.g., Limassol's transition team and heat island interventions), the development of new mobility platforms (such as Subcrunch in Slovenia), and behavioural shifts towards sustainable transport (as seen in Lufti, Finland), all contributing to enhanced collaboration, social engagement, and the strengthening of local and national innovation ecosystems.[773]

Context and rationale

European cities face complex challenges in achieving climate neutrality, from reducing emissions to overcoming behavioural and institutional barriers. NetZeroCities was designed to address these issues by supporting cities in developing actionable Climate City Contracts (CCCs),[774] which outline commitments, action plans, and investment strategies for achieving net-zero emissions by 2030, informed by ongoing needs assessments and tailored interventions.

This approach supports alignment with EU policy frameworks and addresses local contexts and funding imbalances.[775] These challenges include the urgent need to reduce greenhouse gas emissions, improve urban liveability, and foster inclusive and sustainable mobility systems. Cities are at the forefront of climate action, yet they often face entrenched structural, institutional, and behavioural barriers that hinder their ability to transition to climate neutrality. These barriers span governance inefficiencies, fragmented stakeholder engagement, limited financial resources, and resistance to behavioural change, such as shifting from private car use to public or active transport modes.[776]

At the outset of the project, a formal needs assessment was conducted to guarantee that the support provided was tailored and impactful.[777] EIT Urban Mobility leveraged its city network to identify transversal challenges (e.g.,

governance, citizen engagement, and financing) and domain-specific gaps were identified in areas such as energy, mobility, and the built environment.[778]

These assessments were not static; they have been continuously updated through direct collaboration with cities, analysis of CCCs, and feedback from pilot activities. For instance, mobility was consistently flagged as a significant barrier, with many cities struggling to encourage behavioural shifts despite having adequate infrastructure. This insight led to targeted interventions such as webinars and workshops focused on behavioural change and stakeholder engagement.[779]

The initiative is deeply embedded within the broader EU policy landscape. It directly supports the European Green Deal and Horizon Europe's Mission for 100 Climate-Neutral and Smart Cities by 2030, as well as related frameworks such as Fit for 55 and National Energy and Climate Plans (NECPs). These policies provide a strategic framework and funding, via Horizon Europe and successive Specific Grant Agreements (SGA1, SGA2, SGA3), that underpin NetZeroCities.

About the initiative

NetZeroCities established measurable objectives co-created with cities and stakeholders to achieve its ambitious goals, focusing on actionable plans and investment strategies. The initiative's structure combines capacity building, peer learning, and technical support, with programmes like the Twin Learning Programme enabling practical knowledge exchange. Diverse actors, including local governments, schools, and businesses, collaborate on projects ranging from school renovations to the creation of municipal academies, resulting in rapid community engagement and the emergence of innovative funding and governance models.

The objectives of this initiative were formulated through co-creation activities, including the development of CCCs that required cities to define their ambitions, action plans, and investment strategies in collaboration with local stakeholders, experts, and citizens.[780] The initiative's structure offered a multifaceted support system: while direct financial support was limited, cities benefited from capacity-building programmes, mentoring, knowledge exchange, and the "Mission Platform, a one-stop shop for technical assistance, peer learning, and access to best practices.[781]

Training programmes and workshops, such as the Twin Learning Programme, enabled mutual learning between cities, like in the case of Courcy (France) and Lisbon,[782] detailed in Box 4 below, focusing on practical climate adaptation, cooperative funding models, and citizens' engagement.

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[768] EIT Urban Mobility input.
[769] EIT. (2022). NetZeroCities: EIT Urban Mobility working to support cities to achieve climate neutrality by 2030. https://www.eit.europa.eu/news-events/news/netzerocities-eit-urban-mobility-working-support-cities-achieve-climate-neutrality .
[770] Ibid.
[771] European Commission. NetZeroCities. Accelerating cities' transition to net zero emissions by 2030. https://cinea.ec.europa.eu/featured-projects/netzerocities_en .
[772] European Commission. (2023). CORDIS - EU research results. SPECIFIC GRANT AGREEMENT N°2 TO SCALE THE CITIES MISSION PLATFORM. https://cordis.europa.eu/project/id/101139652.
[773] EIT Urban Mobility input.
[774] For details see section 4.1.3.1.
[775] Net Zero Cities. Results, Publications & Insights. https://netzerocities.eu/results-publications/ .
[776] EIT Urban Mobility input.
[777] EIT. (2022). NetZeroCities: EIT Urban Mobility working to support cities to achieve climate neutrality by 2030. https://www.eit.europa.eu/news-events/news/netzerocities-eit-urban-mobility-working-support-cities-achieve-climate-neutrality.
[778] EIT Urban Mobility input.
[779] Ibid.
[780] Ibid.
[781] Beneficiary NetZeroCities input.
[782] Ibid.

Box 4. The village of Courcy and the Twin Learning Programme

The village of Courcy's journey with NetZeroCities exemplifies the initiative's impact at the grassroots level. Initially hesitant about their legitimacy to participate, Courcy was encouraged to apply for the Twin Learning Programme and was ultimately selected by Lisbon as a partner. This recognition fostered a sense of pride and catalysed local engagement. Through the programme, Courcy participated in mutual learning exchanges, site visits, and collaborative projects focused on climate adaptation, cooperative funding, and citizen engagement.

A diverse range of actors took part in the process, including the municipality, local schools, community groups, skilled sponsors from private companies, and civil society organisations. Their collaboration enabled several tangible projects, such as renovating school buildings with renewable energy and bio-sourced materials, establishing permaculture gardens, and installing solar panels. Youth-led renovation activities, supported by skilled company sponsors, helped students develop practical skills and strengthened their readiness for future employment. The partnership with Lisbon provided inspiration and practical models, while the Twin Learning Programme's structure enabled Courcy to test and implement new ideas rapidly.

As described by Christophe Bartholeyns, "*Being chosen by Lisbon and the subsequent recognition from the Greater Reims area fostered a sense of pride and catalysed the village's engagement in the Twin Learning Programme*". The experience also revealed challenges, such as language barriers and limited direct funding, but the "stamp" of NetZeroCities provided credibility and helped mobilise stakeholders. Ultimately, Courcy's involvement led to increased community investment, youth skills development, and the demonstration of scalable solutions for climate action.[783]

Societal impacts

NetZeroCities has delivered tangible societal benefits by empowering communities to lead climate action, creating new skills and employment opportunities, and strengthening the capacity of partner organisations. Through cross-border partnerships and innovative business models, the initiative has fostered cooperative, community-driven solutions.[784] Across participating cities, residents, schools, and local organisations have launched projects tailored to local needs, from urban greening and water management to renewable energy and sustainable mobility pilots.

At the community level, the NetZeroCities initiative has catalysed a profound transformation in how cities approach climate action and social development. By breaking down traditional silos, the programme has enabled city administrations, local businesses, NGOs, and citizens, including young people, to actively shape the climate and youth assemblies, providing platforms for citizens and young people to participate in shaping the climate transition, access funding, and co-develop impactful initiatives.

Rapid pilot programmes and sense-making workshops have accelerated experimentation, allowing communities to test and scale solutions quickly, while regular knowledge exchanges have reinforced the value of hands-on learning and cross-community collaboration.[785]

A notable impact has been the shift in behaviour towards sustainable mobility, supported by targeted workshops and pilot activities that encouraged the adoption of public and active transport. These efforts have not only equipped teachers, students, and residents with practical skills for future employment but also have enabled entire communities to design and implement climate action plans.

The initiative's pan-European approach has strengthened local and national innovation ecosystems, connecting cities to broader networks and facilitating the transfer of best practices across borders. For partners institutions, including municipalities, schools, universities, and local businesses, NetZeroCities has expanded visibility, opened new avenues for collaboration and funding, and positioned them at the forefront of climate leadership.

The Mission Platform and Twin Learning Programme have further enabled knowledge exchange and cross-border partnerships, spreading innovative practices and cooperative funding models to ensure the benefits of climate action are widely shared and sustained. A particularly illustrative example is the village of Courcy, whose partnership with Lisbon through the Twin Learning Programme catalysed local engagement, skill development, and community pride while addressing local challenges (see Box 5).

Box 5: Societal impact of the Twin Learning Programme in Courcy

The Twin Learning Programme has had a transformative effect on Courcy, strengthening community bonds and accelerating climate action. Mutual learning exchanges, site visits, and collaborative projects introduced new approaches to climate adaptation, cooperative funding, and citizen participation.

Youth engagement was central to Courcy's approach. Renovation projects led by young people, along with the creation of "open bar labs" and Eco Schools, energised both students and educators. These hands-on experiences enhanced learning and equipped participants with practical skills for future employment. The community embraced a culture of experimentation, encouraging schools to rapidly prototype and test activities within short time frames.

This agile approach accelerated learning and fostered innovation, even in the face of limited direct funding. Rather than relying on external resources, Courcy demonstrated the strength of local commitment by mobilising self-sourced and community investment, showcasing the viability of cooperative funding models. Annual celebrations and workshops further reinforced the value of experimentation and cross-community learning, while Courcy's partnership with Lisbon provided both inspiration and practical models for local action.[786]

Crucially, many of these impacts would not have occurred, or would have taken much longer, without EIT Urban Mobility's support. EIT Urban Mobility's involvement brought not only funding and technical expertise, but also a trusted brand, robust methodology, and a vibrant community of innovators. The EIT Urban Mobility network facilitated rapid knowledge transfer, scaled best practices, and created a pan-European platform for experimentation and learning.

EIT Urban Mobility's added value was multifaceted, providing access to extensive networks and dissemination channels, including media and marketplace-specific activities such as Tomorrow. Mobility World Congress[787] and Mobility Talks.[788] These helped build relationships and share knowledge across cities and stakeholders. The organisation's expertise in deploying and scaling innovative solutions, through cascading funding, managing pilot and twin activities, and connecting cities with market-ready innovators, was instrumental in accelerating implementation and ensuring that solutions moved from research to real-world impact.

While some challenges remain, such as language barriers, time constraints, and the need for more inclusive funding models, the NetZeroCities experience demonstrates the essential role of EIT Urban Mobility in enabling

[783] Ibid.
[784] Net Zero Cities. Results, Publications & Insights. https://netzerocities.eu/results-publications/.
[785] EIT Urban Mobility input.
[786] Beneficiary NetZeroCity input.
[787] A major international event for urban mobility innovation.
[788] A series of expert-led discussions and workshops that foster knowledge exchange and stakeholder engagement.

systemic, people-centred change at scale and in positioning its partners uniquely within the European innovation landscape.[789]

Impact attribution

The indicator "Mobilised funding on sustainable mobility infrastructure" measures EIT Urban Mobility's ability to attract and leverage external funding for sustainable urban mobility projects. It reflects the KIC serving as a catalyst for public-private investment in solutions that support decarbonisation, inclusivity, and resilience in European cities.

By 2024, EIT Urban Mobility mobilised EUR 29 million, almost reaching the target of EUR 30 million and representing significant progress in a challenging investment landscape. This achievement demonstrates the KIC's capacity to connect cities, corporates, and investors through co-funding mechanisms, equity investments, and support for accessing EU and national programmes. Initiatives such as its investment arm and accelerator programmes have positioned EIT Urban Mobility as a leading investor in the European mobility sector, helping over 100 start-ups secure more than EUR 40 million in capital.

At the EU level, the scale of investment required for sustainable mobility is enormous, estimated at EUR 1,5 trillion by 2050, with EUR 500 billion needed for sustainable mobility measures alone. Public funding remains dominant, with mechanisms such as the Connecting Europe Facility (EUR 7 billion) and the Recovery and Resilience Plans (EUR 83 billion) driving large-scale infrastructure projects. Private investment is growing, supported by green bonds and blended finance, but barriers such as fragmented funding mechanisms and regulatory complexity persist. Against this backdrop, EIT Urban Mobility's contribution is aligned with EU priorities but remains modest in absolute terms, reflecting its role as an enabler within a much larger financial ecosystem.

Hence, while EIT Urban Mobility has made a meaningful contribution to mobilising funding for sustainable mobility infrastructure, the overall investment landscape is shaped by a complex interplay of EU programmes, national policies, and private capital flows. This indicator should therefore be interpreted as evidence of portfolio-level contribution, not as a sole driver of EU-wide investment shifts.

[789] EIT Urban Mobility input.

Table 141. Impact attribution "# Innovation pilot scalings"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
Mobilised funding for sustainable mobility infrastructure	This indicator measures the amount of non-EIT funding attracted for sustainable mobility projects supported by EIT Urban Mobility. The logic assumes that EIT Urban Mobility's interventions (co-funding, equity investments, and facilitation of access to external finance) were critical enablers, but acknowledges that broader investment flows depend on EU programmes, national policies, and private-sector dynamics.	**Contribution** – EIT Urban Mobility helped mobilise funding, but cannot claim full attribution	**Moderate –** Based on internal financial reporting and validated through project documentation; triangulated with external sources such as the NetZeroCities initiative case study.	**Scope limitations:** KPI measures funding mobilised through EIT-supported projects, not total investment in sustainable mobility. **External factors**: EU funding instruments (e.g., CEF, RRF), national recovery plans, and private-sector investment strategies strongly influence outcomes. **Attribution complexity:** While EIT Urban Mobility provided essential support, systemic investment patterns are driven by multiple actors and policy frameworks.

4.8.3.4 Increased citizen involvement and level of active participation in decision-making and co-creation of urban mobility solutions

Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations

Citizen engagement is increasingly recognised as a strategic driver of sustainable urban mobility across Europe. As cities transition toward climate-neutral and inclusive transport systems, involving citizens in the design, testing, and implementation of mobility solutions helps make the systems more responsive to real needs, socially accepted, and more likely to succeed. With over 75% of EU citizens living in urban areas, and this figure projected to rise to 78% by 2050, the design and implementation of mobility solutions must reflect the lived realities, preferences, and needs of urban populations.[790]

The *European Commission's Urban Mobility Framework*[791] and the *EU Mission: Climate-Neutral and Smart Cities*[792] both emphasise the importance of participatory governance, calling for cities to embed citizen involvement throughout the planning and delivery of mobility measures. These frameworks advocate for transport systems that are safe, accessible, inclusive, and affordable, and stress that citizen participation is not only a democratic imperative but a necessity for effective implementation.

However, recent empirical research conducted by the European Climate, Infrastructure and Environment Executive Agency (CINEA)[793] reveals that only a minority of EU-funded mobility projects achieve high levels of citizen participation. The report concludes that citizen engagement remains underdeveloped in many Smart Cities and Communities (SCC) projects, despite its strategic importance. While most projects include some form of public participation, most activities are limited to lower levels of engagement, such as informing and consulting. Less than 15% reach co-creation or co-decision-making, which are considered essential for meaningful involvement.

The analysis identifies three main categories of barriers to deeper engagement:

- Institutional barriers, including fragmented governance structures, lack of mandates for participation, and short project lifecycles that prevent continuity.
- Technical barriers, such as underutilised digital tools, poor integration of online and offline formats, and limited accessibility for vulnerable groups.
- Social and personal barriers, including low trust in institutions, limited time availability, and a perception among citizens that their input has little impact.

In response to these challenges, EU institutions are increasingly supporting structured and inclusive engagement mechanisms. For instance, the European Commission promotes the integration of citizen participation into Sustainable Urban Mobility Plans (SUMPs)[794], while the JRC has developed living-lab methodologies[795] to test

[790] European Commission, 2025. New Eurobarometer survey highlights urgent urban challenges and investment needs across EU cities. https://ec.europa.eu/regional_policy/whats-new/newsroom/19-06-2025-new-eurobarometer-survey-highlights-urgent-urban-challenges-and-investment-needs-across-eu-cities_en.
[791] European Commission, 2021. Commission Staff Working Document: EU Urban Mobility State of Play (SWD/2021/470 final). https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52021SC0470.
[792] European Commission, 2025. EU Mission: Climate-Neutral and Smart Cities. https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/eu-missions-horizon-europe/climate-neutral-and-smart-cities_en.
[793] Smart Cities Marketplace, 2025. Scalable Cities Expert Report: Tackling Barriers to Citizen Engagement in European Cities. https://smart-cities-marketplace.ec.europa.eu/sites/default/files/2025-09/Scalable%20Cities_Tackling%20barriers%20to%20citizen%20engagement%20in%20European%20cities.pdf.
[794] European Commission, 2024. Sustainable Urban Mobility Planning and Monitoring. https://transport.ec.europa.eu/transport-themes/urban-transport/sustainable-urban-mobility-planning-and-monitoring_en.
[795] Joint Research Centre, 2021. Exploring Mobility Transitions through Living Labs: Methodological Framework and Lessons Learned. https://publications.jrc.ec.europa.eu/repository/handle/JRC127272.

mobility innovations in real-life settings. These efforts aim to institutionalise engagement and improve digital and physical accessibility so that citizen input translates into tangible outcomes.

EIT Urban Mobility is important in this landscape. As an innovation community, it actively supports the co-creation and testing of mobility solutions through its demonstration projects, pilots, and living labs. These initiatives are designed to involve citizens and local associations from the earliest stages of solution development, ensuring that innovations are grounded in local realities and capable of scaling across diverse urban contexts.

Through programmes such as *RAPTOR*[796] and *Citizens on the Move*[797] EIT Urban Mobility facilitates rapid prototyping and collaborative problem-solving between cities, citizens, and solution providers.

For example, as part of its Business Plan 2020, EIT Urban Mobility supported a range of projects that used living labs and real-life demonstrations to co-create and test innovative mobility solutions across Europe. The following examples, organised by Innovation Hub, highlight the variety of pilots and experiments undertaken:

- **Innovation Hub SOUTH**:
    - FURNISH (Fast Urban Responses for New Inclusive Spaces and Habitat): Tactical urbanism and digital manufacturing to quickly deploy Mobile Urban Elements for pedestrian and leisure spaces (Milan, Barcelona, Espoo, Budapest, Guimaraes).
    - Inclusiv_eBike: Development and demonstration of rickshaw e-bikes to enhance mobility and inclusiveness for vulnerable groups during COVID (Bilbao, Bergamo).
- **Innovation Hub WEST**:
    - CityFlows: Cloud-based decision-support system for proactive crowd management, tested in four living labs at crowded pedestrian locations (Amsterdam, Milan, Barcelona).
- **Innovation Hub EAST**:
    - CALL4SMS (Citizen Aimed Living Lab for Smart Mobility Solutions): Methodology and platform for testing connected and automated mobility solutions in different EU environments, with strong citizen involvement (Prague, Decin).
- **Innovation Hub CENTRAL**:
    - UrbanSmartPark (USP): Pilot demonstration of automated vehicles for driverless on-street parking and related services (Hamburg, Helmond, Braunschweig).
    - CLEAR (City LivEAbility by Redesign): Real-life transition experiments in urban streets to improve liveability (Amsterdam, Milan, Munich).
    - MOBY (Living Lab e-Micromobility): Living lab analysing regulatory, safety, legal, and financial conditions for e-micromobility use; outputs include guidelines and publications (Munich, Copenhagen, Tel Aviv).[798]

The impact of these efforts is captured through the indicator “Demonstrations/pilots/living labs within a project that actively involve citizens and/or local associations”, which reflects the degree to which participatory innovation is embedded in urban mobility initiatives. It signals a shift from technocratic planning to collaborative governance,

[796] EIT Urban Mobility. RAPTOR. https://raptorproject.eu/.
[797] https://www.eiturbanmobility.eu/impact-stories/citizens-on-the-move-participants-put-training-into-action-for-a-co-created-future-2/.
[798] Nesterova, N., Uzunova, E., & van Egmond, P. (2021). EIT Urban Mobility Knowledge base of innovative solutions in urban mobility and living labs, https://www.eiturbanmobility.eu/wp-content/uploads/2021/04/EITUM_Knowledge_base_living_labs_final_report_PUBLISH-1.pdf.

where citizens are empowered to shape the mobility systems they use. This approach not only enhances democratic legitimacy but also improves the quality, acceptance, and sustainability of urban mobility solutions.

The following Table 142 provides an overview of the impacts achieved for KPI # Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations.

Table 142. # Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations

Impact indicators	Targets	Impacts achieved
# Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations.	228 by 2024 468 by 2027	KIC-specific indicator KSN02 measures the number of demonstrations, pilots, and living labs within EIT Urban Mobility projects that actively involve citizens and/or local associations. This indicator is directly linked to Strategic Objective 5 - Promoting effective policies and behavioural change, ensuring that citizens are placed at the centre of innovation and that urban mobility solutions are developed in ways that are socially accepted, inclusive, and responsive to community needs. The definition of KSN02, as provided by EIT Urban Mobility in the Strategic Agenda, specifies that projects must actively engage a representative share of citizens and community groups of different ages and social backgrounds. This includes mobilising local associations to maximise outreach, raise awareness of the opportunities and restrictions associated with new measures, and strengthen citizen ownership of solutions. Living labs are defined as user-centred, open innovation ecosystems based on co-creation, integrating research and innovation processes in real-life communities and settings.[799] Between 2021 and 2023, EIT Urban Mobility reported 159 citizen-engaged demonstrations, pilots, and living labs, surpassing the target of 158 for that period.[800] By 2024, this figure had already reached 244, showing that more than half of the Strategic Agenda target of 468 initiatives by 2027 has been achieved. **By 2024** 244[801] The European Commission has recognised the Living Lab (LL) concept as a key tool for open innovation since 2006. First introduced in the Helsinki Manifesto under the Finnish EU Presidency, living labs were initially applied to the development of new ICT tools but have since expanded across Europe to a wide range of fields, including sustainable energy, healthcare, safety, and mobility. Networks of living labs now exist at the European and international level, with the European Network of Living Labs (ENoLL) having labelled more than 460 living labs worldwide.[802] In the field of urban mobility, living labs are considered an important vehicle for enabling a real shift from incremental improvements toward fundamental transformation of mobility systems. They provide a structured

[799] EIT Urban Mobility. ANNEX 4 - List of EIT Urban Mobility Key Performance Indicators (KPIs). https://www.eiturbanmobility.eu/wp-content/uploads/2021/05/Annex4_List-of-KPIs-1.pdf.
[800] EIT Urban Mobility Impact report 2024, internal material.
[801] EIT internal monitoring data.
[802] Nesterova, N., Uzunova, E., & van Egmond, P. (2021). EIT Urban Mobility Knowledge base of innovative solutions in urban mobility and living labs, https://www.eiturbanmobility.eu/wp-content/uploads/2021/04/EITUM_Knowledge_base_living_labs_final_report_PUBLISH-1.pdf.

setting for cooperation between cities, industry, research, and citizens, with active user involvement in the ideation, co-creation, and validation of solutions.

This approach aligns closely with the objectives of the EU Sustainable and Smart Mobility Strategy and contributes to its implementation. In the field of urban mobility, living labs are considered an important vehicle for enabling a real shift from incremental improvements toward fundamental transformation of mobility systems. They provide a structured setting for cooperation between cities, industry, research, and citizens, with active user involvement in the ideation, co-creation, and validation of solutions.

Urban Mobility Living Labs thus represent a growing and diversifying innovation landscape, offering cities and stakeholders opportunities to jointly test and scale solutions in real-life environments, with the active participation of citizens.

5.9.

Impact attribution

The indicator "# Demonstrations/pilots/living labs within a project that actively involve citizens and/or local associations" measures EIT Urban Mobility's contribution to embedding citizen engagement and co-creation in the development and testing of urban mobility solutions. This indicator is directly linked to the objective of ensuring that mobility innovations are socially accepted, inclusive, and responsive to community needs.

By 2024, EIT Urban Mobility reported 244 citizen-engaged demonstrations, pilots, and living labs, surpassing the 2024 target and already achieving more than half of the 2027 goal. This strong performance reflects the KIC's commitment to participatory innovation, with initiatives such as RAPTOR and Citizens on the Move enabling rapid prototyping and collaborative problem-solving between cities, citizens, and solution providers.

At the EU level, citizen engagement is increasingly recognised as a strategic driver of sustainable urban mobility, but remains underdeveloped in practice. Recent research shows that only a minority of EU-funded mobility projects achieve high levels of citizen participation, with less than 15% reaching true co-creation or co-decision-making. EIT Urban Mobility's results are therefore moving in the right direction and exceed the EU average in terms of structured, active citizen and local association involvement.

However, it is important to note that the existence and success of these pilots and living labs are not solely attributable to EIT Urban Mobility. Their development and scaling are also enabled by a range of external factors, including supportive city policies, EU and national funding programmes, local leadership, and the growing maturity of participatory innovation ecosystems across Europe. Barriers such as fragmented governance, limited digital accessibility, and low trust in institutions continue to limit the depth and continuity of citizen engagement across Europe. EIT Urban Mobility's contribution is significant at the project and portfolio level, but systemic change requires broader policy alignment and sustained investment in participatory mechanisms.

Table 143. Impact attribution "# Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations"

Impact indicators	Attribution logic	Attribution type	Evidence robustness	Caveats
# Demonstrations/pilots/living labs within a project that actively involve citizens and/or local associations	This indicator counts the number of EIT Urban Mobility-supported projects that engage citizens and local associations in the co-creation, testing, and validation of mobility solutions. The logic assumes that EIT Urban Mobility's interventions–funding, technical support, and facilitation of participatory processes–were critical enablers. However, a range of external factors, including supportive city policies, EU and national funding, local leadership, and the maturity of participatory innovation ecosystems, also enable the existence and success of these pilots.	**Contribution** – EIT Urban Mobility enabled citizen engagement, but cannot claim full attribution.	**High –** Based on internal monitoring and project reporting, validated through activity leader assessments and portfolio reviews. Data is systematically collected and regularly updated.	**Scope limitations:** KPI measures the number of participatory projects but does not assess the depth, continuity, or systemic impact of engagement. **External factors:** Institutional, technical, and social barriers, as well as city-level policies, funding, and resources, strongly influence outcomes. **Attribution complexity:** While EIT Urban Mobility provided essential support, embedding participatory governance at scale requires coordinated action across multiple stakeholders and policy frameworks.

4.9 EIT's contribution to impacts

In total, 37 indicators were analysed for attribution. Of these, 8 are characterised by direct attribution, 28 indicate a contribution by the KICs to the measured effect, and one shows mixed attribution characteristics, as set out in the table below.

Table 144. EIT's contribution to impacts

Impact indicators	EIT KIC	Attribution type	Evidence robustness
# of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience	EIT Climate-KIC	Direct attribution	High
# Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations		Contribution	Moderate
Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change		Contribution	Moderate
Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through RIS programme)	EIT Digital	Contribution	Moderate
Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality Label by European Technical Universities		Direct attribution	High
# EIT Digital Professional and Online learners		Direct attribution	Moderate
# new micro-credentials developed by EIT Digital-supported universities		Direct attribution	Moderate
% of women students in EIT Digital programmes/Average DESI for Human Capital development in Europe		Mixed attribution	Moderate
Presence of EIT Digital partners among the European Digital Innovation Hubs (EDIHs)		Direct attribution	Moderate
% of alumni who continue their work in the InnoEnergy field, battery sector	EIT InnoEnergy	Contribution	Moderate
Survival rate of a venture managed by a woman entrepreneur (in %)		Contribution	Moderate
People with access to energy in developing countries, thanks to InnoEnergy deployed assets		Contribution	Moderate
External funds raised by supported assets (where InnoEnergy has a financial interest (equity of return on sales)		Contribution	Moderate
The value-added of the InnoEnergy KIC, as reported in the financial statements (in MEUR)		Contribution	Moderate
# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)	EIT Health	Contribution	Moderate
Number of upscaled projects that make healthcare more agile through structured (digitised) processes		Direct attribution	High
Percentage increase in raw materials concentrate produced	EIT RawMaterials	Contribution	Moderate

Number of cases of critical raw materials substitution/reduction		Contribution	Moderate
Percentage increase in advanced materials produced		Contribution	Moderate
# people taking part in EIT Food co-creation activities	EIT Food	Direct attribution	High
# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency		Contribution	Moderate
# EIT Food supported products on the market with levels of salt &/ or free sugars &/or trans & saturated fats reduced to, or below, recommended Food-Based Dietary Guidelines for Europe (targeting food groups known to be major sources of these dietary factors); or products on the market with an improved nutritional profile		Contribution	Moderate
# EIT Food supported products on the market derived from alternative sources (e.g., alternative proteins; new plant varieties; alternative production techniques, etc.)		Contribution	Moderate
# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams		Contribution	Moderate
EUR Social, Environmental & Economic Return on Investment per 1EUR invested in EIT Food portfolio of activities (“Portfolio ROI”)		Contribution	Moderate
% of upskilled employees working in the manufacturing sector	EIT Manufacturing	Contribution	Moderate
Share of women scientists and engineers in manufacturing		Contribution	Moderate
Women board members in manufacturing companies;		Contribution	Moderate
% of women-led startups in manufacturing		Contribution	Moderate
% of women-led consortia in funded innovation activities		Contribution	Moderate
Revenue growth in manufacturing		Contribution	Moderate
# New jobs created in supported Start-ups/Scale-ups		Contribution	Moderate
# of participating companies increasing digital maturity		Contribution	Moderate
# New courses developed	EIT Urban Mobility	Direct attribution	High
# Innovation pilot scalings		Contribution	Moderate
Mobilised funding for sustainable mobility infrastructure		Contribution	Moderate
# Demonstrations/pilots/living labs within a project that actively involve citizens and/or local associations		Contribution	High

Source: Ecorys

Out of indicators with direct attribution properties, 5 have high evidence robustness, while 3 have only moderate evidence robustness. The attribution for the rest of the impact indicators has moderate evidence robustness for all but one indicator – EIT Urban Mobility’s # Demonstrations/pilots/living labs within a project that actively involves citizens and/or local associations (contribution with strong evidence robustness).

5 Conclusions

This study has determined that the European Institute of Innovation and Technology (EIT) and its eight Knowledge and Innovation Communities (KICs) have made a substantial and measurable contribution to strengthening Europe's innovation capacity, fostering economic growth, and generating positive societal outcomes.

The findings confirm that the EIT delivers impact through a distinct ecosystem-oriented approach rather than through isolated interventions. The EIT's added value lies in its ability to mobilise and integrate the Knowledge Triangle, connecting education, research and business actors, and thereby supporting innovation pathways from capacity building to market uptake and scale-up. Beyond monetary effects, the KICs have strengthened Europe's innovation capacity by supporting the creation and growth of start-ups and scale-ups, while also fostering networks and cooperation capacity that contribute to the development of visible innovation ecosystems. **This impact is further reinforced through the EIT's place-based dimension, including the EIT Regional Innovation Scheme (EIT RIS)**, which enables KICs to embed activities in local and regional ecosystems while maintaining a pan-European reach through cross-border collaboration.

At the same time, the observed positive developments reflect the influence of multiple factors beyond the EIT and the KICs. However, the findings suggest that the EIT ecosystem operates in a complementary manner, contributing to and reinforcing these developments through its integrated, ecosystem-oriented approach.

Across the portfolio, the KICs have stimulated entrepreneurship, supported start-ups and scale-ups, and developed a broad base of innovation-driven ventures and educational activities that align closely with EU strategic priorities, particularly the green, digital, and health transitions**.**

There is consistent evidence of positive economic effects. Companies supported by KICs demonstrate significant revenue growth compared to baseline levels, and many qualify as high-growth enterprises within the European innovation ecosystem. While the magnitude of economic benefits varies by sector and KIC maturity, **a clear pattern of innovation-based growth and job creation emerges, with many ventures attributing their success directly to EIT support.** These effects are particularly visible among the more mature KICs, such as EIT Climate-KIC, EIT InnoEnergy, and EIT Digital, which have had more time to consolidate networks, expand market reach, and demonstrate systemic influence.

Employment creation emerges as another strong dimension of EIT's impact, with substantial number of new jobs recorded among KIC-supported companies and clear evidence of positive effects on skills development and career progression**.** Graduates of EIT-labelled programmes report improvements in their entrepreneurial skills, income, and employability, confirming the contribution of EIT education to the development of a skilled and innovation-oriented workforce. However, data on employment outcomes and long-term career trajectories remain fragmented, and the report notes that comprehensive tracking mechanisms are still under development.

In terms of societal impact, the study confirms that EIT support has contributed to addressing key global challenges and advancing the EU's sustainability agenda. **KIC activities align strongly with the European Green Deal, Horizon Europe, and the Sustainable Development Goals, contributing to decarbonisation, digital transformation, gender equality, and regional cohesion across Europe.** Although the extent of these impacts varies by thematic focus and regional context, the overall evidence points to a coherent contribution to systemic change and policy-relevant outcomes.

In undertaking our analysis, the study encountered methodological and data limitations. The diversity of KIC missions and indicator definitions, coupled with uneven data coverage, constrains the comparability and precision of impact estimates. Because many societal outcomes are shaped by external factors, the report cautions that quantitative findings should be interpreted as indicative rather than absolute measures of impact. The Dealroom platform was used to collect and monitor the performance data of KIC-supported companies. However, not all

KICs use this platform as their main tool for storing venture data, and some rely on alternative systems. As a result, not all companies supported by the KICs are registered in Dealroom. Moreover, data for all registered companies are not always available, and some entries are missing for certain years.

The issue of data limitations is illustrated with the example of KPI **"***Number and type of jobs in existing businesses sustained through innovations***".** The only data available to inform the analysis for this indicator came from surveys conducted among KIC-supported companies. The data from the surveys, however, were limited and unreliable, as only a few responses were collected. This is largely because stakeholders tend to associate innovation with the creation of new jobs or the transformation and upgrading of existing roles, rather than the sustaining of current jobs. Therefore, the usefulness of this KPI for measuring EIT impact turns out to be limited.

In conclusion, the study finds that the EIT has successfully fulfilled its mission to integrate education, research, and innovation across Europe, resulting in tangible economic and societal benefits and establishing a distinctive model for cross-sector collaboration. At the same time, it emphasises the need for continued refinement of the EIT Impact Framework, improved harmonisation of data collection, and enhanced methodologies for impact attribution. While younger KICs are still in the early stages of development, their trajectories suggest growing systemic influence and a strong potential for sustained contributions to Europe's long-term innovation and sustainability goals.

More specifically, the **recommendations** from this Report are the following:

1. **EIT should streamline and standardise the EIT Impact Framework and KPI set**, including recalibrating or replacing indicators with persistently weak feasibility.

Justification: There is an uneven interpretability and comparability of some indicators across KICs, as well as recurring measurement constraints. A simplified, harmonised and more feasible KPI architecture would strengthen the credibility of portfolio-level conclusions and reduce reliance on weaker proxies.

2. **KICs should harmonise cross-KIC data systems and apply consistent reporting standards** for ventures, innovations and education, including minimum data completeness requirements and systematic registration of supported entities.

Justification: The economic impact evidence is constrained by inconsistent data coverage and incomplete registration in common platforms, limiting the robustness of findings on jobs, revenues and investment. Shared standards implemented by KICs would directly enhance the quality and aggregation of evidence.

3. **EIT should work with KICs to strengthen impact attribution through longitudinal tracking of learners and ventures** and systematic triangulation with external benchmarks and datasets.

Justification: The study emphasises that EU-wide impacts depend on market and regulatory conditions, so results should be interpreted as a contribution rather than full attribution. Jointly implemented longitudinal follow-up and benchmarking would better capture time-lagged outcomes and provide a more defensible account of EIT added value.

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Annexes

Annex 1: Study framework

This Annex details the methodology applied in this Impact Study. It outlines the structure of the study, the tasks and their sequence, as well as the data sources used. It also includes key methodological considerations that guided the design of the approach, and which should be taken into account when interpreting the findings presented in this report.

Due to the complexity of the Economic Impact analysis, the methodology applied for that component is presented separately in Annex 2.

Study structure

The study was structured into interconnected tasks, each with specific objectives and methodologies.

- Task 0: Inception Phase

This foundational task aligned all stakeholders (EIT, KICs, and the study team) on objectives, methodology, and data availability. Key activities included a kick-off meeting, workshops with KICs to develop simplified impact pathways and clarify indicator definitions (see section *KIC workshops* below), identification of data sources and gaps, and the sampling and selection of impact indicators. Task 0 was conducted in parallel with Task 1 (Desk research) to allow initial insights from KIC engagement to inform ongoing desk research and vice versa. This phase culminated in the delivery of an Inception Report (finalised after the completion of Task 1).

- Task 1: Desk Research

This task was to identify and extract relevant findings from existing evaluations and data analyses related to the EIT and KICs. It involved a systematic review of both direct sources (EIT/KIC reports, previous studies) and external sources (e.g. European Commission reports; see section *Desk research and secondary datasets* below).

- Task 2: Economic Impact Data Collection and Analysis

This task focused on measuring the actual economic impact of KIC activities. It relied primarily on KPIs from the EIT Impact Framework related to revenue generation, start-up and scale-up support, and job creation. Data collection was conducted through analysis of the Dealroom database. Analytical methods included descriptive statistics. This task resulted in the first-stage Impact Study Report.

- Task 3: Societal Impact Data Collection and Analysis

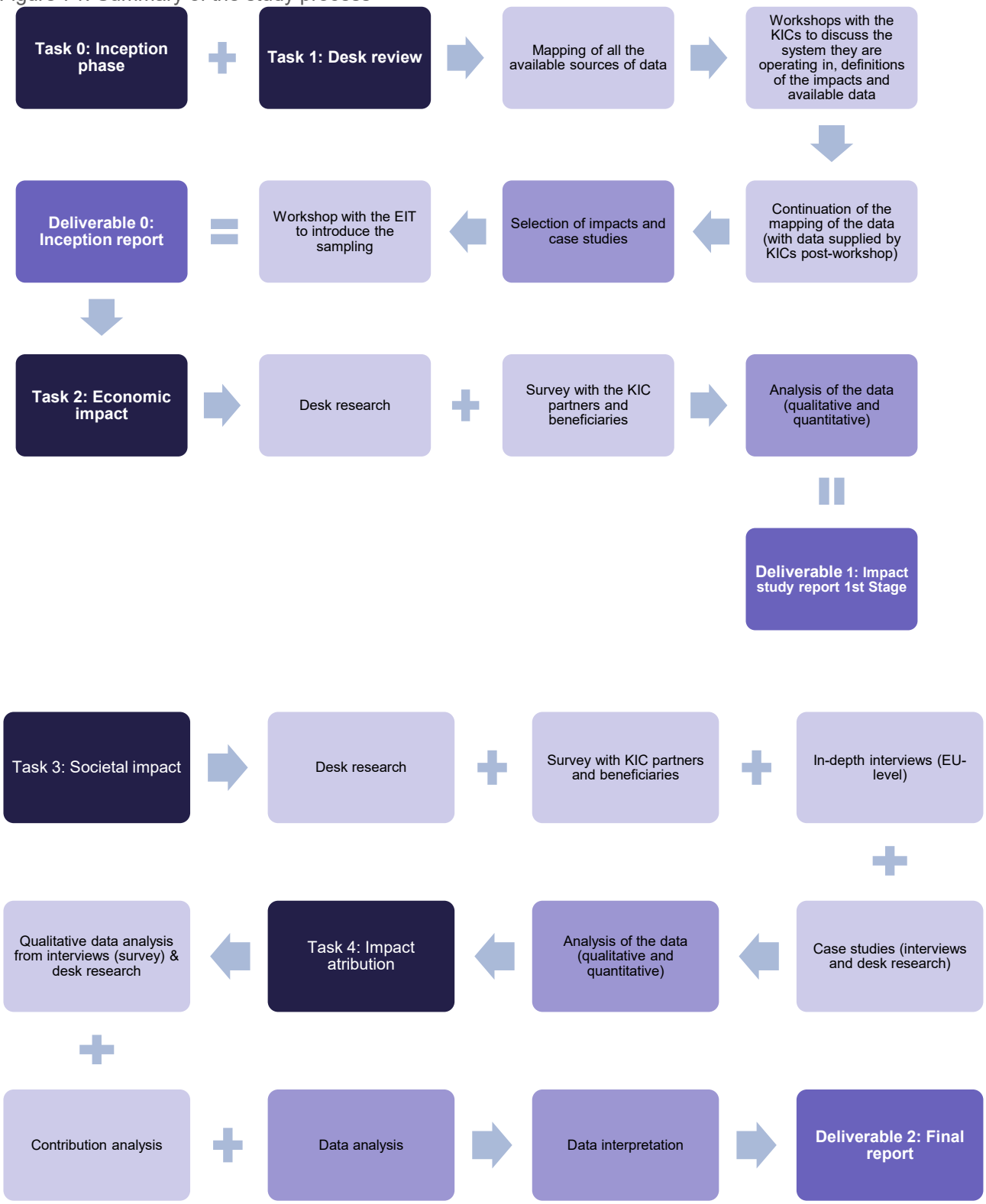
The purpose of this task was to quantitatively assess the KICs' contribution to addressing societal challenges. Activities included a launch of a targeted online survey with KIC beneficiaries and partners (see section *Online survey of KIC partners and ventures* below), refining definitions for selected societal impact indicators, and qualitative and quantitative analysis of the gathered data. Data were gathered through desk research, internal and external data sources (see the section *Desk research and secondary datasets* below), in-depth interviews with EU-level stakeholders and for case studies (see sections *Stakeholder interviews* and *Eight KIC case studies* below), and survey results (see section *Online survey of KIC partners and ventures* below).

- Task 4: Impact Attribution

This final analytical task determined how impacts could be directly attributed to KIC activities, and assessed the EIT's added value. A contribution analysis approach was applied, drawing on qualitative data from workshops, interviews, and surveys, as well as quantitative data.

Figure 71 provides an overview of the study process:

Figure 71. Summary of the study process



Source: Ecorys

Design overview and analytical framework

This section outlines the conceptual and analytical foundations of the Impact Study. It presents the overarching design principles that guided the methodological choices and explains how the analytical framework was structured for consistency, rigour, and relevance. The framework was developed to accommodate the diversity of KIC activities and impact pathways, while enabling a coherent assessment of the EIT's contribution to the European innovation landscape.

The methodological approach adopted was shaped by key considerations:

- First, the study recognises the inherent diversity and complexity of the EIT's multidimensional impact indicators. Given that KICs operate across a range of thematic and sectoral domains, with impacts differing significantly in scope, measurement, and data availability, a flexible and nuanced strategy was required. A tailored approach was therefore prioritised over a rigid, one-size-fits-all methodology.
- The approach aimed to respect the distinctiveness of each KIC while ensuring coherence in the overall assessment. This was intended to capture the complexity of individual contributions and translate them into an integrated overview of the EIT ecosystem as a whole. This principle was also consistent with the EIT's Knowledge Triangle model.
- The methodology was specifically designed to address potential data gaps, ensuring a comprehensive and accurate assessment of impacts. This included the deliberate use of varied methods to identify and fill such gaps.
- A mixed-methods approach was central to the study. This combined quantitative techniques (desk research, surveys, KPIs, econometric analysis) with qualitative methods (interviews, case studies), allowing the study to effectively reflect the diversity of impacts and data sources.

Indicator sampling and selection logic

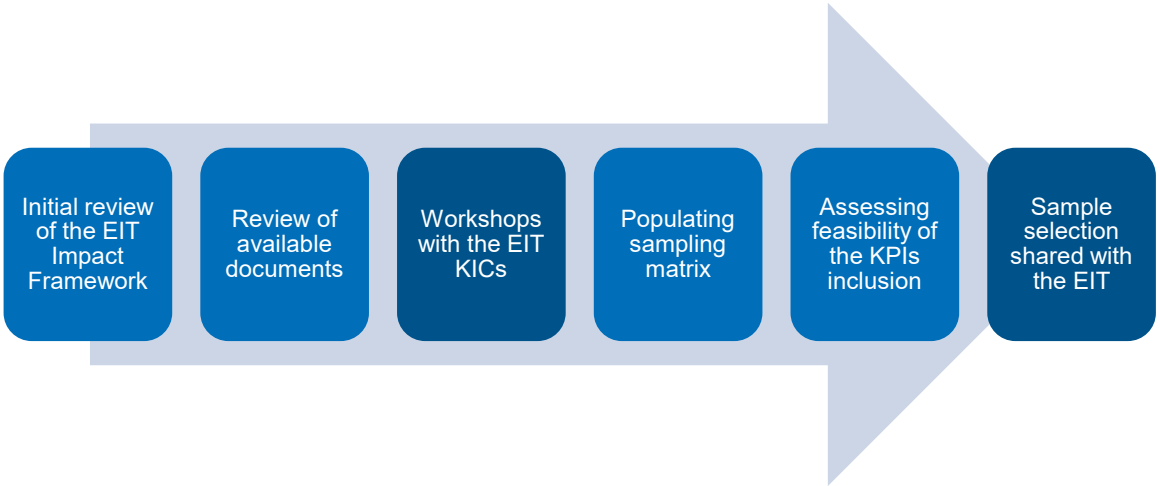
The sampling of impact indicators to be included in the study was conducted in close cooperation with the EIT. While the horizontal (common to all KICs) societal and economic impact KPIs were discussed and agreed upon through meetings and feedback exchanges, the KIC-specific KPIs required the development of specific methods and a tailored matrix.

The approach to sampling those, more complex in nature, KIC-specific indicators was guided by a set of selection criteria/principles:

- **Feasibility/Data Availability**: The presence of high-quality, relevant data was essential. For an indicator to be selected, sufficient data had to be accessible, whether from EIT- and KIC-produced sources, self-reported data, or external sources (see section *Data sources and collection tools* below).
- **Completeness and Reliability**: This criterion assessed whether datasets were adequate to support robust analysis, focusing on the quality and comprehensiveness of the data. For example, an indicator could be considered "feasible" if high-quality, relevant data could be triangulated from multiple sources. Conversely, if data were insufficient or could not be reliably assessed for completeness, the indicator was excluded.
- **Relevance to the KIC**: The degree to which an indicator was considered important for a given KIC, based on its thematic focus, strategic priorities, and operational context.

The methodology applied in Task 0 (see section above on the *Study structure*) included structured steps designed to build a sound understanding of the EIT Impact Framework and the feasibility of assessing selected indicators. This process is summarised in Figure 72:

Figure 72. Sampling exercise (Societal Impacts) – Task 0



Source: Ecorys

The three main steps were:

1. Review of framework and documentation

The team examined the EIT Impact Framework and related documents, including annual KIC reports, external evaluations, and other relevant materials. Definitions were cross-checked with Strategic Agendas, and reported figures were compiled to assess data quality, calculation methods, and availability.

2. Workshops with KICs

Structured sessions were held with six KICs to map intervention logic and clarify indicator definitions. Discussions focused on how Economic and Societal Impact KPIs were measured and reported, and on identifying internal data sources. Outputs directly informed the sampling matrix.

3. Sampling matrix and feasibility assessment

A tailored matrix was used to evaluate each indicator's inclusion based on data availability, triangulation potential, attribution feasibility, KIC preferences, and methodological complexity. Indicators with weak attribution or limited methodological clarity were excluded.

The sampling matrix was structured as:

KPI	Definition (EIT)	Working definition	Direct Data Sources	External Data Sources	Self-Reported Data	Data Availability	Sampling Feasibility	Decision on inclusion

- **KPI** identified the specific KPI as per the Impact Framework.

- **Definition (EIT)** provided the formal definition of the indicator as included in the EIT Impact Framework. This served as the official reference point to build upon.
- **Working Definition** captured how the indicator has been calculated in practice, based on available documentation and insights gathered during workshops with the KICs. Hence, this column included "operationalisation" of the indicator.
- **Direct Data Sources** listed the internal data sources held by the KICs that can be used to calculate or inform the indicator.
- **External Data Sources** included identified relevant external databases or public data sources,
- **Self-Reported Data** indicated whether additional data could be collected through self-reported means, that is, via surveys launched.

For all data sources, the identification included both existing and potential data sources (i.e. sources we know KICs/EIT possess, sources we expect the KICs/EIT possess, and any additional data sources we suggest as potentially enriching the information).

Each source was assessed based on two criteria:

  - **Reliability** – how dependable and credible the source is for measuring or supporting the indicator. It considers factors such as data accuracy, consistency, and methodological soundness. For example:
    - High reliability – official statistics or validated internal databases.
    - Medium reliability – surveys (while based on self-reported data, they follow structured and consistent formats but may include subjective bias) or internal qualitative assessments (informed but may lack external validation or consistent methodology across KICs).
  - **Completeness** – how extensive and comprehensive the data is, considering, for example:
    - How many years of data are available, and whether historical trends can be analysed.
    - Did KICs report that the data is not complete?
    - Is this source complete in terms of how many data points it covers (e.g. Dealroom and percentage of the ventures covered)?

- **Data Availability** offered a qualitative assessment of the overall availability and completeness of the data required to assess the indicator.
- **Sampling Feasibility** evaluated whether it is methodologically feasible to calculate the indicator and establish a credible link (attribution or contribution) to KIC activities.

Based on this analysis, the team held internal discussions to perform a final assessment and select the indicators to include in the study sample. The proposed sample was then shared with the EIT for validation and approval (Inception report).

Approach to economic-impact measurement

The more detailed methodological explanation of the approach to the economic impact assessment is provided in the separate Annex 2. The following section summarises the approach described in detail henceforth.

Generating innovation-based growth

The assessment of innovation-based growth generated by KICs followed the EIT Impact Framework, focusing on revenue growth, survival of supported start-ups and scale-ups, creation of innovation ecosystems, RIS country coverage, and revenues from market-launched innovations.

Data were drawn primarily from the Dealroom database, complemented by KIC-reported information. Dealroom provided annual revenue data for supported companies, though coverage was incomplete: only about one quarter of all identified companies had usable revenue data, with significant variation across KICs. Longitudinal data three years after support were available for a smaller subset, which limited the scope for trend analysis.

For the analysis, companies were grouped into two categories: those with recorded KIC investment (financial support) and those linked to KICs without recorded investment (non-financial support such as mentoring or networking). Both were considered beneficiaries of EIT activities.

The results, therefore, reflect total company revenues rather than the direct and isolated contribution of KICs, as firms often received additional support from other sources. In cases where companies were supported by multiple KICs, they were counted under each. Accordingly, revenue growth should be interpreted as a proxy for KIC-driven impact.

Employment creation

EIT's impact on employment creation was assessed through seven EIT Impact Framework indicators, covering both job creation and sustainability, as well as skills development and graduate employment outcomes. These include: new jobs created in start-ups and scale-ups, employment growth in supported firms, jobs sustained in existing businesses, skill gaps addressed, and career and employment outcomes of EIT Label graduates.

For indicators on job creation and employment growth, the primary source of data was the Dealroom database, which provides annual employee figures for supported companies between 2016 and 2025. However, coverage was incomplete: not all supported companies are included in Dealroom, and data gaps exist for certain years. To improve completeness, additional data were provided directly by some KICs. Overall, employment data were available for around 43% of supported companies, with coverage varying considerably across KICs.

As with revenue analysis, it is not possible to isolate the specific contribution of KICs to employment, since companies often received support from multiple sources. Reported employment figures therefore reflect total jobs in supported firms, serving as a proxy for KIC impact. To refine these estimates, supplementary evidence was drawn from previous evaluations, KIC reports, and dedicated surveys of companies and partners, including surveys conducted in parallel studies of newer KICs.

For indicators on skills and graduate outcomes, the main source was the JRC survey of EIT Label graduates, which provided insights into career development, employment in start-ups, and the wider employability impact of EIT education.

Approach to economic impact attribution

The EIT economic impact attribution applies a **multi-layered benchmarking methodology** designed to capture the relative performance of EIT-supported ventures within the broader European innovation landscape, applying various approaches as listed below.

Benchmarking with Eurostat data: The analysis follows Eurostat's indicators for measuring enterprise growth, enabling direct comparison with EU-wide trends. Employment and revenue growth rates of EIT-supported ventures were calculated and compared to Eurostat's cohort-based approach by firm age. This allows for a consistent assessment of how EIT-backed enterprises perform compared to the average European start-up at similar stages of development. To address the heterogeneity of data, two robust and policy-relevant indicators were selected as

complementary benchmarks, i.e., enterprise survivability and the share of high-growth ventures. These indicators align with international statistical standards (Eurostat/OECD) and provide reliable insights into business resilience and scaling potential, even when precise revenue baselines cannot be established.

Comparative analysis with other European and international programmes: To further contextualise the EIT's performance, EIT indicators were benchmarked against similar innovation programmes and accelerators, including StartupBootcamp, EXIST, and MassChallenge. This comparison allows for an assessment of EIT's relative effectiveness in fostering business survival, growth, and innovation outcomes.

Consideration of programme complexity and support mechanisms: The methodology also acknowledges the inherent complexity of the EIT's structure and the diversity of its interventions, which combine financial investment with non-financial support such as mentoring, training, R&D facilitation, and ecosystem networking. These mechanisms are widely recognised in the literature as key enablers of start-up success, enhancing firms' growth potential, resilience, and ability to attract follow-on investment. By incorporating both quantitative benchmarks and qualitative context, the approach provides a nuanced, evidence-based attribution of economic impact, demonstrating how the EIT contributes to employment creation, revenue expansion, and the overall strength of Europe's innovation ecosystem.

Approach to societal-impact measurement

Measuring KIC-specific Societal Impact presented a complex challenge due to the diverse thematic orientations and operational models of individual KICs. The following section outlines the methodological considerations and practical observations that shaped the approach to assessing Societal Impact, developed during Task 0 and Task 1, and summarised in the Inception report.

While the Impact Framework provides a common reference, its application across KICs has proven uneven. Each KIC interprets and operationalises Societal Impact in ways that reflect its sectoral focus, maturity, and strategic priorities. As a result, the study encountered significant variation in both the scope and detail of reported indicators, requiring a flexible and context-sensitive approach to analysis.

KICs **differ substantially in how they conceptualise and operationalise societal Impact**. Some adopt a detailed set of KPIs, while others rely on broader, aggregated categories with less granularity. Even within individual KICs, multiple levels of impact are reflected, ranging from high-level achievements (e.g. environmental outcomes) to project-level outputs and results.

The societal KPIs defined in the EIT Impact Framework **do not always align with how KICs calculate or interpret them in practice**. Annual reporting often shows variation in definitions and methodologies, with KICs applying different interpretations. Approaches include the use of proxies, forecasts, portfolio-level assessments, or the reporting of core EIT KPIs. This lack of consistency complicates cross-KIC comparability.

Most calculations are based on **internal data and self-assessments**, either conducted by MEL divisions within KICs or commissioned from external studies. Where KPIs are clearly defined and systematically tracked, attribution of KIC activities to societal outcomes is more straightforward. However, for broader or compound indicators, particularly environment-related KPIs such as CO_2 reduction, direct causal links are difficult to establish due to data limitations and the diffuse nature of impacts.

KICs also vary in the prioritisation and perceived usefulness of indicators. While some place significant emphasis on specific metrics, others regard certain KPIs as too complex or indirect to provide meaningful insights.

The introduction of the new EIT Impact Framework in 2022 (see Chapter *2.0 Introduction*) created further challenges for longitudinal analysis. **Limited historical data exists** for some indicators, restricting the ability to assess performance trends over time or to establish benchmarks.

Workshops conducted during the study revealed that KICs **do not always clearly distinguish between outputs, outcomes, and impacts**. In some cases, outcomes were equated with impacts, which risks overstating the level of change achieved.

For the purposes of this study, these differences are acknowledged explicitly and addressed through a flexible, mixed-methods approach.

Approach to societal impact attribution[803]

We have executed a contribution analysis as the overall evaluation approach. Contribution analysis provides insights regarding the nature and level of importance of an intervention's contribution. It also provides an increased understanding of how, why, and for whom the observed results and impacts have (or have not) occurred and the roles played by the intervention and other factors.[804] This involves a structured process of critical thinking to analyse other explanations of the change process, such as the activities of other interventions or contextual dynamics. Within the societal impact analysis, we have based our contribution analysis on data resulting from the surveys, desk research, interviews and EIT statistics. For each of the selected societal impact indicators, we have completed the following aspects:

- **Attribution logic** – The description of the contribution that the EIT has made to the achievements for the indicator.
- **Attribution type** – The type of contribution. We distinguished two types:
  - ▷ Attribution: The achievements made on the indicator can be attributed to the EIT.
  - ▷ Contribution: The achievements made on the indicator have been achieved partially due to the EIT's contributions.
- **Evidence robustness** – The robustness of the data underpinning the contribution logic and type. We distinguished three types:
  - ▷ Moderate: There is a limited triangulation of data supporting the contribution.
  - ▷ High: There is a strong triangulation of data supporting the contribution.
- **Caveats** – The shortcomings identified in defining the contribution logic, type and robustness (see also section on study limitations).

Data sources and collection tools

The analysis drew on a range of data sources and methods, reflecting the diversity of KIC activities and the complexity of assessing their impacts. The sources can be grouped into three main categories:

Direct Sources

This category included data provided directly by the EIT and the KICs. It comprised KIC reports/monitoring data detailing activities, achievements, and impacts, as well as previous evaluations and studies related to the EIT and

[803] For clarity and consistency, we use the heading "Impact Attribution" throughout this report. However, the text and tables in each section specify whether the EIT's role is best described as "direct attribution" (for input indicators fully controlled by EIT) or as a "contribution" (for outcome/impact indicators where EIT is one of several influencing factors).
[804] Apgar and Levine (2024). Better evaluation: Contribution analysis. https://www.betterevaluation.org/methods-approaches/approaches/contribution-analysis

its KICs. Dealroom database data, which tracked start-ups and scale-ups supported by the KICs, was also included in this category, as its completeness depends on the KICs. These sources offered a first-hand perspective on operations and reported outcomes, and as such were recognised as data sources of high reliability, though limited completeness (lack of historical data, caused by the changes in the Impact Framework).

Self-Reported Data

This category consisted of data collected directly from stakeholders involved in or affected by KIC activities. It included both quantitative and qualitative inputs gathered through surveys and in-depth interviews, including those conducted for case studies. These sources provided insights into selected indicators from the perspective of beneficiaries and partners and were introduced in different sections of the analysis. At the same time, the reliability and completeness of this data were occasionally limited due to the inherent bias of those methods and the variable responsiveness of stakeholders.

External Sources

External or reference sources comprised data not originating from the EIT or its stakeholders. This category covered databases, as well as third-party studies and reports. These sources supported specific indicators, provided insights into the overall impacts of the EIT within the innovation ecosystem, and enabled triangulation and validation of findings. Only high-level data sources were used, limited to databases and EU-level grey literature, excluding academic publications and general data sources.

Desk research and secondary datasets

This section summarises the sources used for the societal impact analysis and the broader assessment of EIT impacts. The Dealroom database is described separately in Annex 2, where the methodology applied for the economic impact analysis is presented.

The desk research drew on sources which can be broadly categorised:

1. Qualitative and quantitative data produced by the EIT and EIT KICs, or commissioned by them.
2. Reports analysing the functioning of the EIT and its role within the broader innovation ecosystem.
3. External databases not affiliated with the EIT or KICs.
4. High-level reports addressing the thematic areas under consideration.

Each source type had distinct characteristics and was utilised differently (Table 145).

Table 145. Summary of desk research sources

Source	Examples of types of sources	Type of data	How it was used in the study
EIT/KICs produced data	• EIT monitoring data (all centrally reported short-term KPIs, 2021-2023) • EIT core KPIs 2010-2024 • EIT monitoring data on impact indicators (2023)	Quantitative	Provided the core evidence base for assessing performance: the outputs and outcomes of KIC activities. Used as supporting evidence for some Societal Impact indicators.

	• EIT KIC reviews 3-years and 7-years, and final assessments of KIC performance	Quantitative and qualitative	
	• KIC produced reports and data: • Annual reports • Impact reports • Project data • Reports produced on the request of the KICs	Qualitative and quantitative	Supplemented monitoring data (above) with contextual evidence, including case-specific results and narrative explanations of outcomes/impacts.
Reports on EIT	• European Commission, Interim Evaluation of Horizon Europe Framework Programme (2021-2024) • European Commission, Evaluation Study of the European Framework Programmes for Innovative Europe • European Commission, Evaluation Study on European Framework Programmes for Digital and Industrial Transition • European Commission, Evaluation Study on Horizon Europe's Contribution to a Resilient Europe	Qualitative and quantitative	Provided external evaluation evidence, offering insights into EIT's positioning within Horizon Europe and the broader EU R&I policy framework.
External databases	• Eurostat • European Environment Agency, GHGs in the EU • WHO, Life expectancy at birth • EIGE, Gender Statistics Database	Quantitative	Served as independent benchmarks/data sources to assess KPI-specific impacts in comparison with EU values, averages and targets. Provided global and European context for specific impacts, helping situate KIC contributions within broader frameworks.
High-level thematic reports	• IPCC (Intergovernmental Panel on Climate Change), Climate Change 2023: Synthesis Report • Copernicus Climate Change Service (C3S) and the World Meteorological Organization (WMO), European State of the Climate 2024	Qualitative and quantitative	

Source: Ecorys

Each data source, whether quantitative or qualitative, was analysed using methods appropriate to its nature. All sources were systematically reviewed, and only those judged to best reflect and substantiate the study's findings were integrated into the analysis.

KIC workshops

As part of Task 0, workshops were conducted with KICs for three main purposes: to better understand their impact pathways, their interpretation of societal impact KPIs (i.e. how they had been calculating them to date), and the availability of supporting data.

Each workshop consisted of two distinct consecutive parts.

In the **first part**, following an introduction to the exercise, participants, selected at the discretion of each KIC, were invited to use the interactive Microsoft Whiteboard platform to provide information on their KIC's outputs (e.g. delivered activities, programmes), outcomes (e.g. students educated, start-ups supported), and link these to Societal Impacts.

The aim was to create simplified, generalised impact pathways illustrating how intended impacts were expected to be achieved. Participants were also asked to add relevant actors (e.g. partners, investment funds) and external factors (i.e. elements that could influence the pathway). This exercise resulted in complex diagrams, which primarily served as a starting point for discussions on the impacts KICs aimed to achieve and the mechanisms through which they intended to do so.

The exercise demonstrated that impact pathways were neither straightforward nor short. The resulting diagrams contained numerous elements, and linking them directly to impacts proved challenging, as many KIC activities were broadly intended to contribute to the desired outcomes. Furthermore, participants had trouble differentiating between different categories (output-outcomes-impacts), which was in part caused by the very definition of the KPIs (result-based impact indicators)

In the **second part**, an Excel spreadsheet was shared to facilitate a detailed discussion of each impact indicator. The objective was to gain a clearer understanding of how each KPI was interpreted by the KICs and how it had been calculated for the annual Impact Reports.

Six workshops were conducted. In the case of two KICs, a more concise format was applied, focusing only on the availability of data sources and the interpretation of indicators.

The insights of these workshops were then used in sampling of the indicators, but also as a reference point in understanding how KPIs are defined. Hence, the report follows the feedback of the participants on how each Societal Impact indicator is presented (that is, guided by the KIC's understanding of it).

Online survey of KIC partners and ventures

The survey for EIT partners and ventures was launched in May 2025 and remained open for two months. Two separate but aligned questionnaires were developed: one targeting ventures and the other targeting partners, each containing specific, though largely comparable, questions. The design of the survey aimed to collect insights on the role of the EIT in achieving results and evidence related specifically to economic and societal impacts. The findings from both strands are presented in the appropriate sections of this report.

The questionnaire was prepared in consultation with the EIT and approved before dissemination. It was also developed in coordination with the external contractor conducting the 7-year assessment of EIT Manufacturing and EIT Urban Mobility, with the objective of ensuring alignment and enabling comparative use of the results across both studies.[805]

Survey dissemination was managed by the KICs, who contacted their respective partners and supported ventures directly. This approach was chosen to comply with GDPR requirements, as no personal data was collected or processed. In addition, the surveys were fully anonymous, a measure deemed important given the inclusion of potentially sensitive questions such as those relating to company revenues.

The survey was designed and implemented as a voluntary self-assessment instrument. While this provides valuable insights into the experiences and perceptions of EIT stakeholders, the results are subject to the methodological limitations inherent to survey-based research. These include potential self-selection bias and

[805] Therefore, partners and ventures supported by both KICs were not contacted directly to be surveyed.

variation in respondents' interpretation of key questions. Nonetheless, the survey provides an important quantitative evidence base, supplementing other data sources used in the Impact Study.

The number of responses varies across survey items, as not all respondents completed the full questionnaire. Item-level non-response was most pronounced in the latter sections of the survey (KIC-specific Societal Impacts, impact on skills development), where respondents occasionally dropped out and did not return. As a result, the most complete datasets are those relating to Economic Impacts, where coverage is comparatively high. This is a positive outcome for the purposes of the study, as the economic impact questions were central to the quantitative analysis, and the design of including those questions at the beginning was intentional. This is also the reason why in the statistics presented throughout this report, the number of respondents does not always sum to the same values across questions.

For societal impacts and broader perceptions of the EIT's role, the survey yielded fewer complete responses. Nevertheless, the qualitative orientation of these sections means that the data collected remains analytically valuable. While the reduced number of responses limits the generalisation of findings in these areas, the data provides useful insights and complements evidence gathered from other sources, including interviews and case studies.

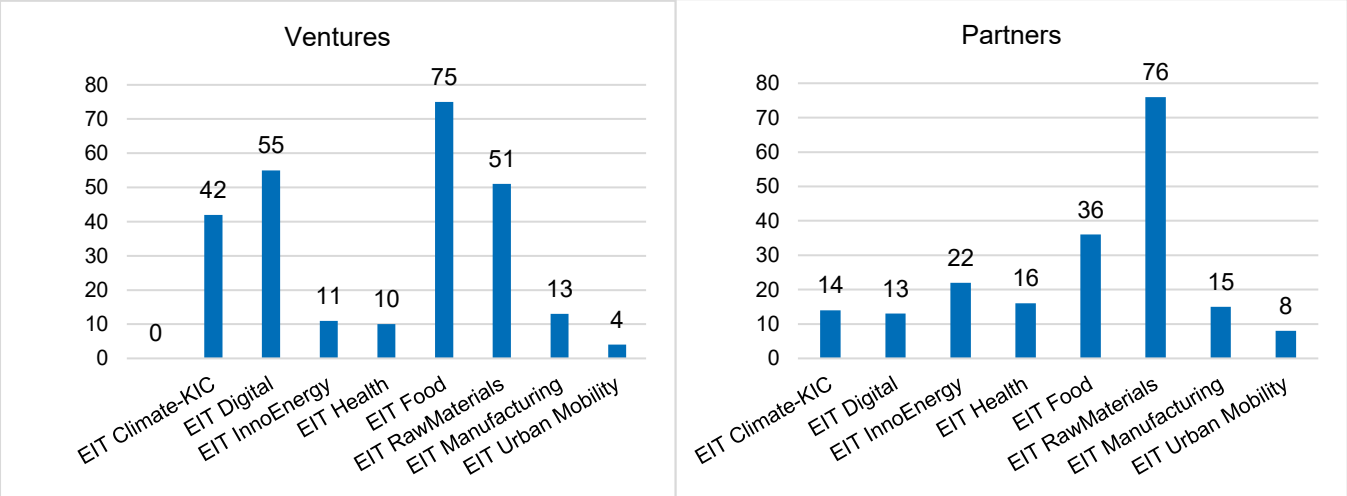
Altogether, 295 ventures and 164 partner respondents started (opened) the survey.

Collaborating KICs

The question asked respondents to identify all the KICs with which they were in any relationship, which means they could choose more than one KIC (Figure 73). Those situations were consistent with findings of the economic impact analysis, which shows that some ventures were supported by more than one KIC throughout their journey.[806]

In both cases, the most respondents reported on relations with the EIT Food and EIT RawMaterials, the least with EIT Health (ventures) and EIT Digital (partners)

Figure 73. Participation in survey (opened surveys)

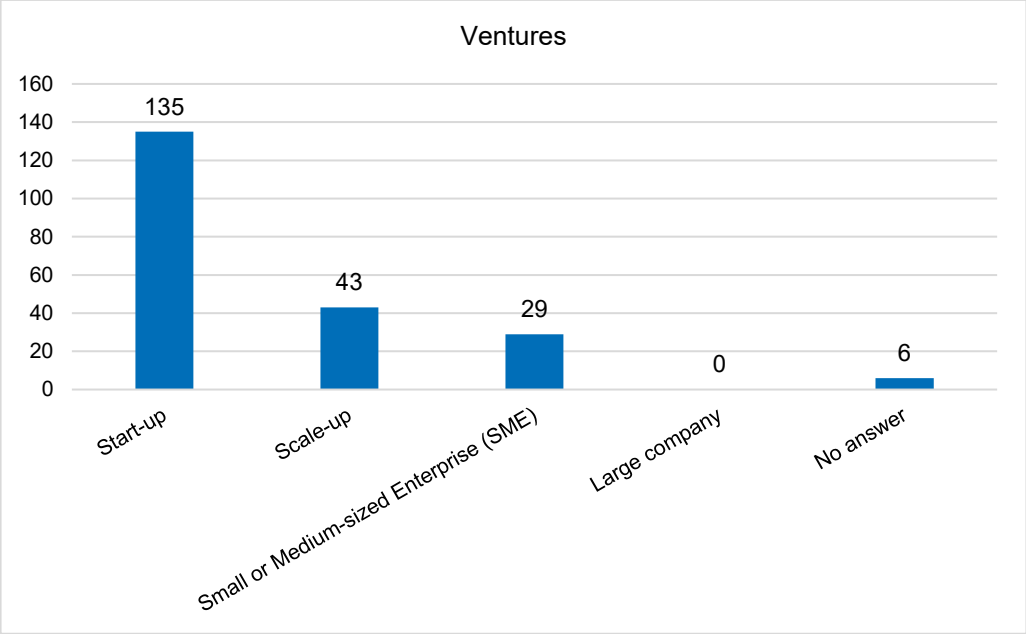


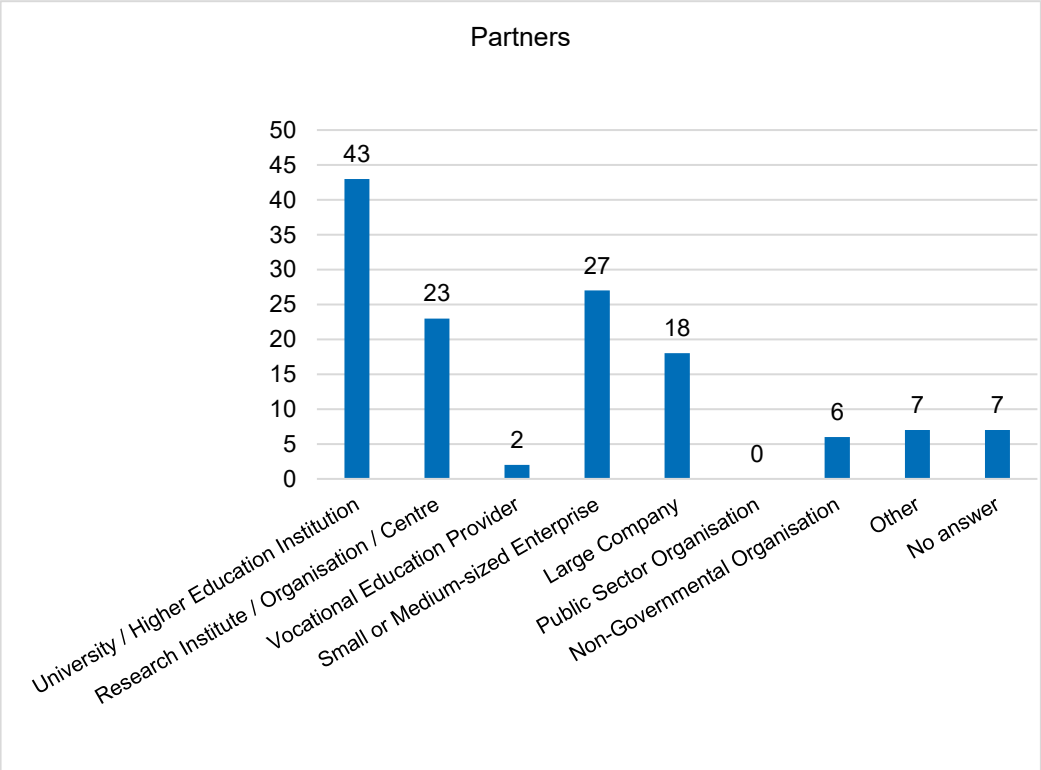
[806] This is also a reason why EIT Urban Mobility and Manufacturing were reported on, while their beneficiaries were not reached directly.

- Type of organisation

Most ventures are identified as a start-up, and none as a large company. Most partners are identified as HEIs, SMEs, and research institutions (Figure 74)

Figure 74 Type of organisations represented in survey sample

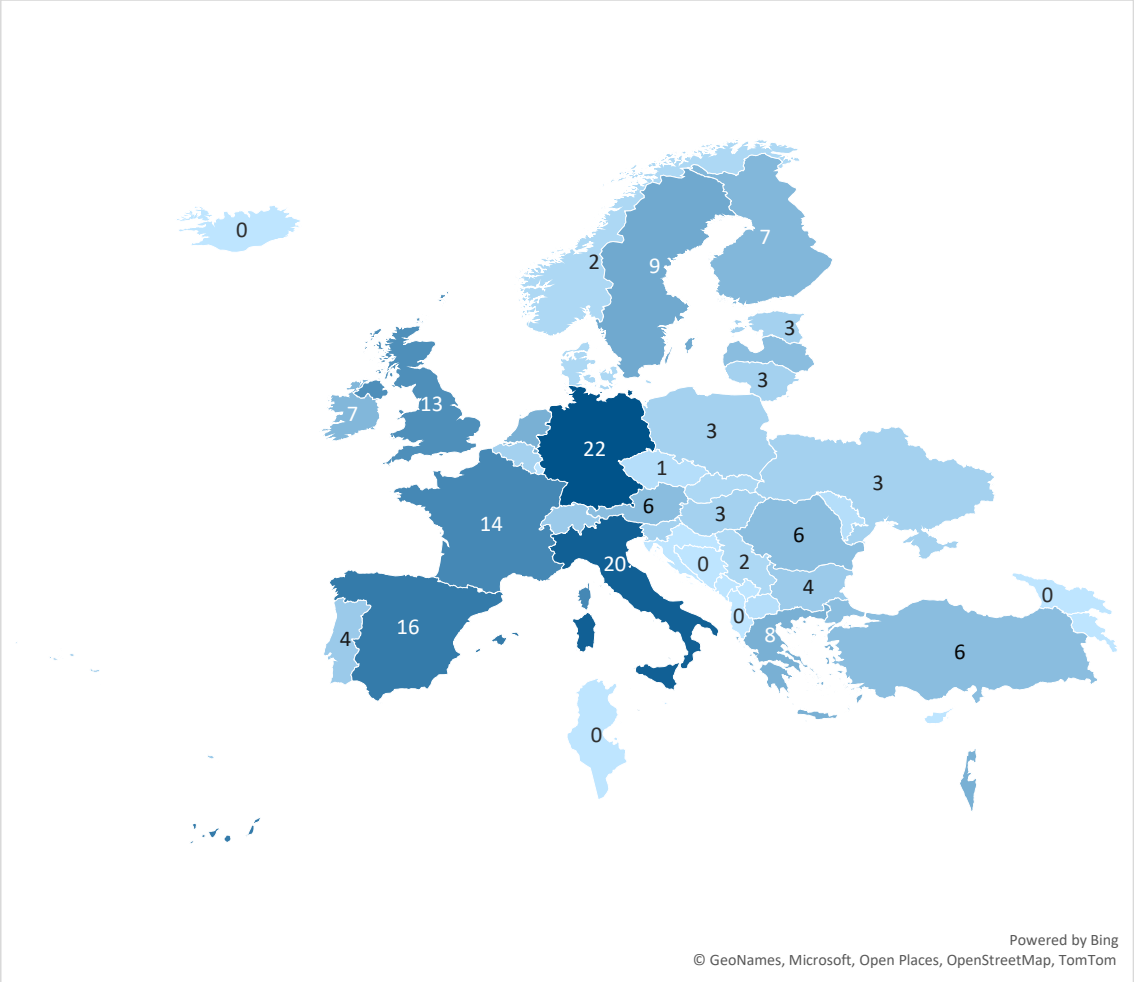




Geographical breakdown

Respondents were from ventures mostly from Western European countries: Germany, Italy, Spain, France and the United Kingdom (Figure 75). There was a lower representation of ventures from other countries and an overall weaker representation of RIS countries.[807]

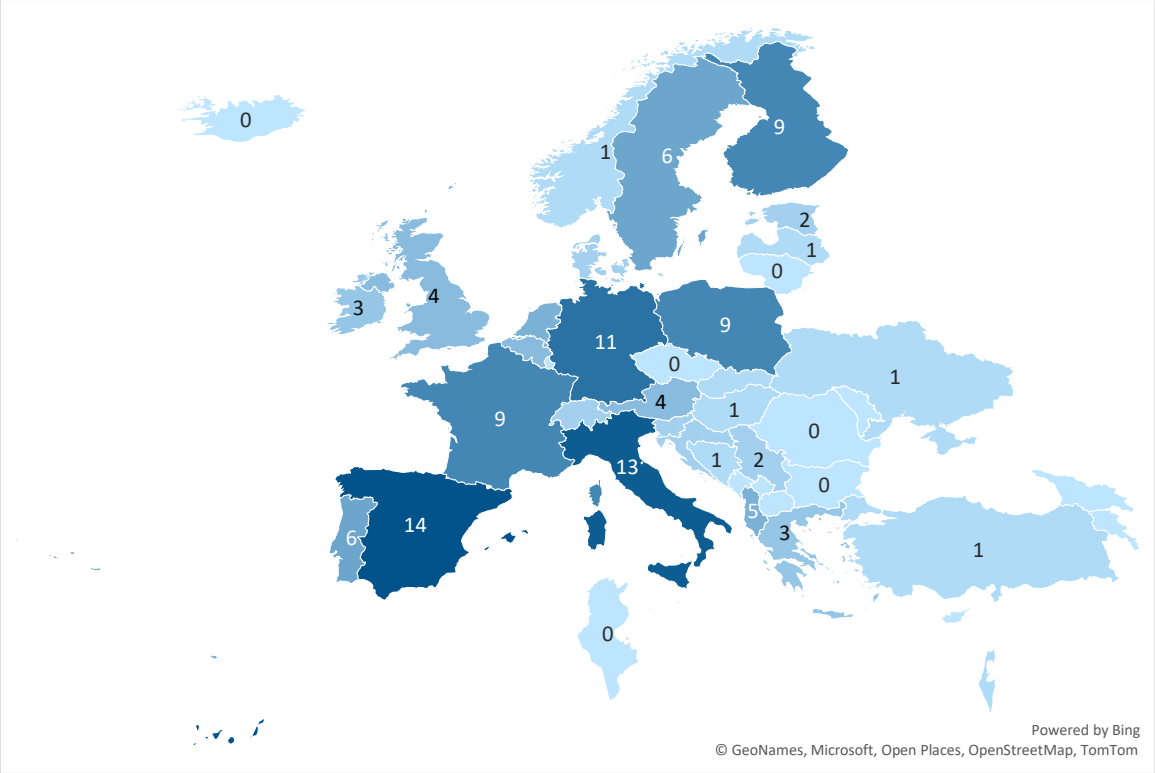
Figure 75. Country representation – ventures



For partners (Figure 76), Western European countries were most represented, and the most responses were collected from Spain.[808]

[807] Additional countries reported included Brazil, Mexico, Tanzania, Colombia, Kenya
[808] Additional countries reported included the United States of America.

Figure 76. Country representation – partners



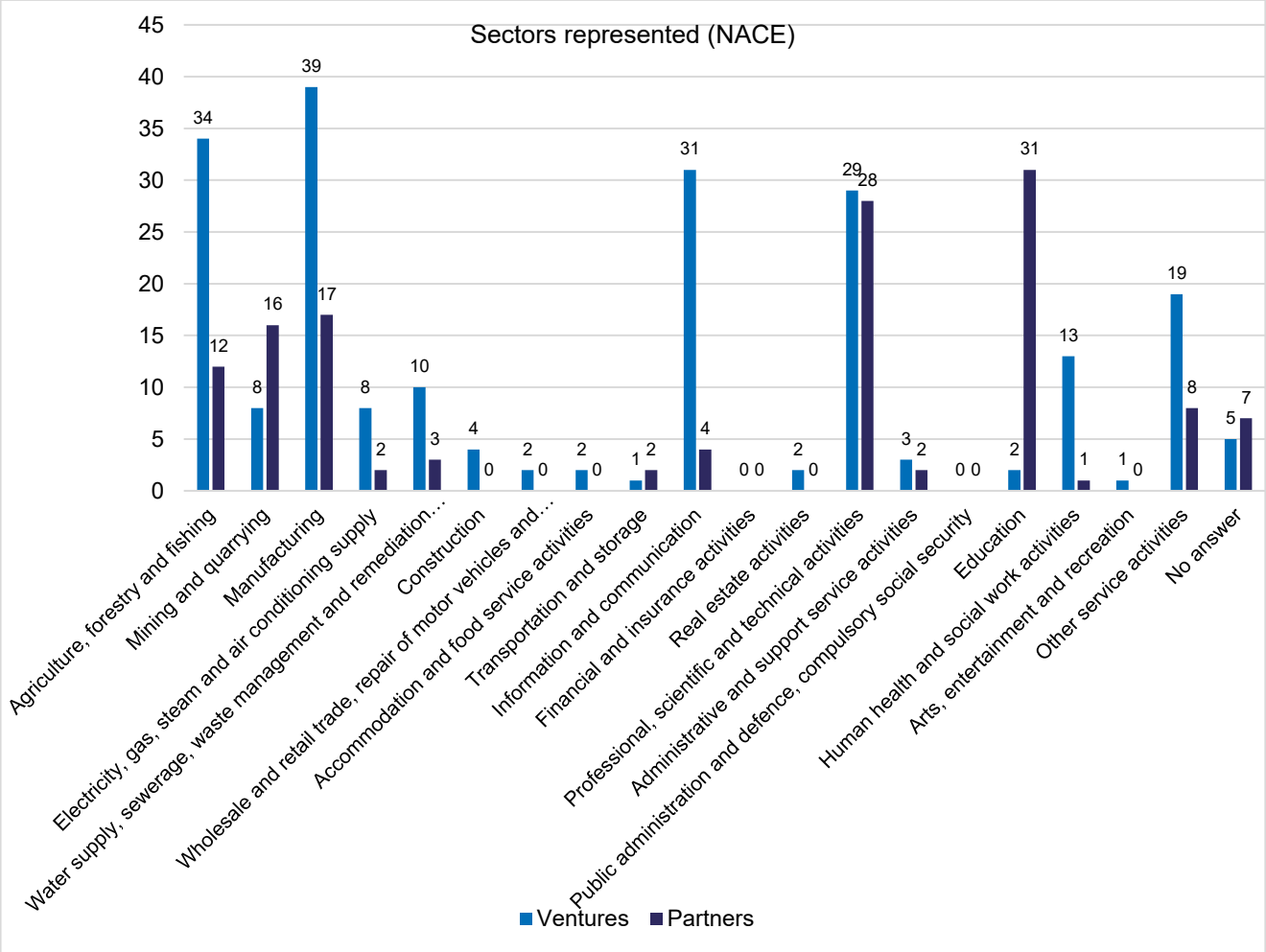
Sectors represented

Sectors, according to the NACE codes,[809] were, as expected, not universally represented. Financial and Insurance Activities, Public Administration and Defence, and Accommodation and Food Service Activities showed minimal or no representation among partners. Similarly, Construction, Wholesale and Retail Trade, and Arts, Entertainment and Recreation had very limited engagement from ventures.

Overall, ventures were more concentrated in production and technology-driven sectors (Figure 77), while partners are more engaged in academic and professional domains, in line with their characteristics.[810]

[809] https://ec.europa.eu/competition/mergers/cases/index/nace_all.html
[810] Survey results

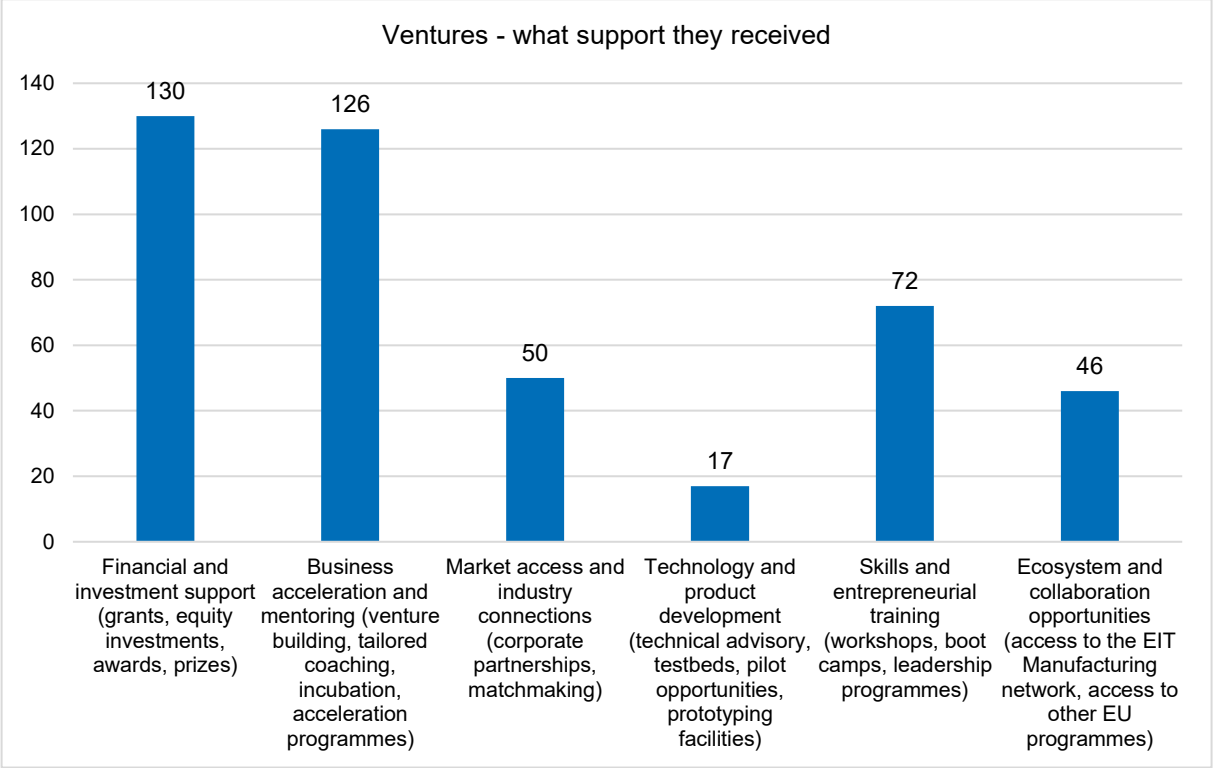
Figure 77. Sectoral representation – survey participants

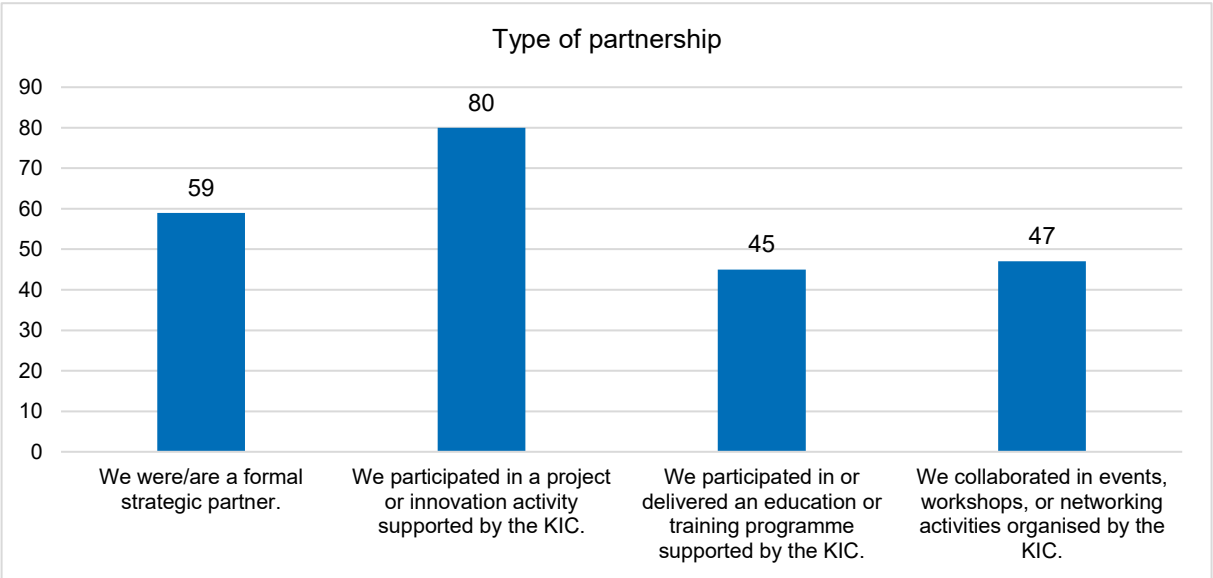


Relationship with KICs

Overall, ventures reported that they primarily benefited from direct support mechanisms aimed at growth and market readiness (Figure 78). Partners were more engaged in strategic, educational, and collaborative roles within the KIC ecosystem, mostly in innovation projects or activities.

Figure 78. Ventures – type of support received





Stakeholder interviews

The findings, particularly those concerning the added value of the EIT within the European innovation ecosystem, were enriched with data from interviews conducted with selected representatives of European Commission Directorates-General (DGs).

The selection of interviewees was based on the thematic scope of the study, reflecting the thematic coverage of the KICs, and their relevance to the subject matter. The list of interviewees was proposed and approved by a representative of DG EAC (under which the EIT operates), and the research tools used were pre-approved by the EIT.

Each interview lasted approximately one hour and was conducted online. Depending on stakeholder preference, interviews were held either individually or in a group format. The topics discussed were tailored to each DG's specialisation and aligned with the operational focus of the respective KICs. Each interview addressed a (single) specific thematic area.

The following themes were covered:

- Research and Innovation.
- Skills for Competitiveness.
- Biotechnology and Food Systems.
- Green Transition and Circular Economy.
- Health Innovation Ecosystems.
- Industrial Transformation.

Ten interviews were conducted: DG RTD (4), DG GROW (3), and DG EMPL (3).

Additionally, ad hoc communication was established with the KICs to support coordination throughout the study. These interactions focused on data availability, sharing of sources, clarifying common understanding, and preparing case studies. As these exchanges were considered part of ongoing collaboration with the KICs, they were not formally tracked. They were conducted as needed to maintain transparency and foster a constructive working relationship.

Eight KIC case studies

Eight case studies were prepared, one for each KIC, each focusing on a specific project or initiative that best exemplifies the KIC's contribution to societal change, as per one chosen KPI. The role of case studies was to provide an illustration of the impact pathway of a single societal impact KPI – from how the activity was planned and designed, to how it influenced the beneficiaries.

The methodology combined desk research with stakeholder interviews to gather comprehensive insights.

Each case study began with targeted desk research aimed at constructing a detailed understanding of the selected initiative. To enrich the analysis with firsthand perspectives, semi-structured interviews. Interviewees were selected in collaboration with the respective KICs. Depending on the initiative and KIC's understanding of the case study goals, interviews were conducted with persons who were/are engaged in designing and implementing the initiative, and those who benefited from it.

However, because of the nature of some initiatives and the principle of not overburdening the stakeholders with repeated contacts, only a limited number of interviews were conducted with beneficiaries. Instead, to show their perspectives, other sources were used (published success stories, interviews, materials shared by KICs).

The interviews included a set of questions, aiming at gathering feedback and insights on:

- The rationale behind launching the initiative and the societal need it aimed to address.
- The specific challenge targeted and how success was defined.
- Resources, partnerships, and actions undertaken.
- Tangible results and impacts on beneficiaries.

- Attribution of outcomes to KIC support.

While the case studies followed a common thematic scope and purpose, they also reflect the unique characteristics of each initiative and the operational diversity across KICs. As such, some inherent differences in structure and emphasis were present. These differences were not only acknowledged but encouraged, guaranteeing that each case study remained relevant and contextually grounded. All case studies were developed in close collaboration with the respective KICs, whose active engagement and agency in shaping the narratives were central to the process.

Study limitations

Economic Impact analysis

The economic impact analysis has some inherent limitations due to the nature of the data sources and the ongoing studies covering the indicators in the economic impact category. It should also be noted, before proceeding into the report, that the achievements of the KICs should be assessed in the context of both their maturity and the thematic area they cover. Understandably, first-wave KICs tend to show higher achievements, as they have existed much longer than those established in subsequent waves; while some may have a broader impact, others may have a more direct but limited effect (caused by the specificity of the sector). This should not be viewed as a weakness, but rather considered an important contextual factor.

Therefore, the main limitations are:

- The **Dealroom platform data**. Dealroom is a primary and main source of information about the companies supported, but it varies in completeness depending on the indicator analysed and the specific KIC. It is less complete for assessing revenue growth, somewhat more complete for employment, but it varies across KICs. This limited the ability to conduct a comprehensive time-series analysis, as some benchmark data were missing.

The precise methods used to address this are detailed in Annex 1 (methodology) and Annex 2 (data sources and limitations), and the limitations are discussed in more detail in each chapter. To further mitigate this limitation, a survey was launched targeting KIC partners and supported ventures to enhance data quality and completeness.

- **Two other concurrent studies are being conducted**: the 7-Year Assessment of EIT Manufacturing and EIT Urban Mobility, and the DG EAC and DG JRC collaborative study on EIT impact (social and economic impacts). The former has the same scope regarding economic impacts as this analysis, so data for those two KICs are included. More significantly, the DG EAC and JRC study includes career tracking of EIT Label programme graduates, addressing questions around employment, entrepreneurship pathways, and skills gaps.

In addition, the study limitations for each of the indicators are presented in Table 146.

Table 146. Economic impact KPIs, data sources, approach to estimate impact and limitations

KPI title and definition	Data source	Approach to calculate the indicator	Limitations
Contribution to the revenue growth of organisations trading or employing innovations developed with the KIC support Percent and absolute (in EUR) contribution to revenue growth of organisations trading or employing innovations (i.e., innovative services, products, technology or business models) developed with KIC support. This indicator encompasses both companies supported by KICs and companies that trade or employ innovations supported by KICs. Companies are classified by country (including EIT RIS countries).	Dealroom data on revenues.	Dealroom data was checked and cleaned of duplicates. When a company was supported by more than one KIC, the support of both KICs was considered. For the companies that report the date of the KIC financial support ("support indicated"), revenue growth was calculated as the difference between the revenues in the last reported year (usually 2023) and the revenues in a baseline year. A baseline year is a year of support or, if data is unavailable, the first reported year after. For the companies for which the year of KIC support is unknown ("support not indicated"), we calculate the difference between revenues for the last reported year (usually 2023) and three years prior to this date. Revenue growth was presented per country and analysed per regions (EU, RIS, EU non-RIS and other countries).	Not all companies supported by the KICs are registered in Dealroom. Data on revenues is missing for some companies. No data on revenues past 2023. No information is available on the direct KIC contribution to revenue growth and distinguishing the support from other factors.
Number and revenue of start-ups and scale-ups supported by KICs and which were trading 3 years after KIC support ceased Number and revenue of start-ups and scale-ups supported by KICs trading 3 years after KIC support ceased. This indicator will also include information on: • Number and revenue of start-ups previously created by EIT Labelled students enrolled and graduates. • Number and revenue of start-ups created as a result of HEI CBI. • Number and revenue of start-ups created as a result of the cross-KIC projects.	Dealroom data on revenues. Previous assessments of KICs activities and impacts. KICs self-reported data and KICs specific studies.	Dealroom data was checked and cleaned of duplicates. In the case of EIT Food and EIT Urban Mobility, the data provided by the KICs was added to the Dealroom data, and duplicates were removed. When a company was supported by more than one KIC, the support of both KICs was considered. Data from other sources were added and cross-checked. The revenues after 3 years were calculated as the sum of the revenues of a given company three years after the last reported KIC support. Revenues were presented per country and analysed per regions (EU, RIS, EU non-RIS and other countries).	Not all companies supported by the KICs are registered in Dealroom. Data on revenues is missing for some companies. No data on revenues past 2023.

• Number of start-ups/scale-ups ceased trading. For start-ups and scale-ups, the data is expected to include the following: start-up/scale-up registration number, sector, annual revenue data, capital value, date of registration, date KIC support ceased and (if applicable) date ceased trading. Companies will be classified by countries (including EIT RIS countries).			
Visible innovation ecosystems not previously in existence An innovation ecosystem is a highly symbiotic (players are highly dependent on each other's inputs and outputs) network of researchers, educators/trainers and companies interacting in a specific area (location and theme) for the generation of new research, development and innovation. Innovation ecosystems are identifiable, such as through the outputs (for example, in a specific area of R&I) they produce and the relationships of members of the ecosystem. They are less mature and business-oriented compared with "business ecosystems". Innovation ecosystems are likely to be associated with CLCs but could also emerge in other locations where KICs are active. Information on innovation ecosystems will include the number and details of organisations from the EIT RIS-defined regions.	KICs self-reported data. Data on the number of KIC entities, provided by the EIT. Previous assessments of KIC's activities and impacts.	Our approach to measuring the visible innovation ecosystems is based on sub-indicators that define the scale of and cover the various elements of the KPI definition. In order to estimate the KIC's contribution to the creation of innovation ecosystems, the following sub-indicators were used: • Number of co-location centres (CLCs). • Hubs and other entities established by the KICs. • Number of active partners. • Number of start-ups created. • Number of start-ups supported. • Graduates from EIT-labelled programmes. The number of KIC entities was calculated based on the EIT-provided data updated to 2025. The same applies to the number of active partnerships. For the number of active partnerships, the active partnerships for the period 2023-2025 are calculated cumulatively to avoid potential bias. Considering that the partnerships for such a period of time more accurately cover the impact of the KICs on local and regional innovation ecosystems, this is a rather dynamic indicator, and using a snapshot of a specific moment might deviate from the results. The other three sub-indicators (Number of start-ups created, Number of start-ups supported, and Graduates from EIT-labelled programmes) are calculated cumulatively, based on KIC-reported data	No information is reported by the KICs about the exact indicator, and sub-indicators were used instead. No information is available on a country level for the number of start-ups created, the number of start-ups supported, and Graduates from EIT-labelled programmes.

		and data provided by the EIT, considering the total numbers since the establishment of each KIC. A multidimensional approach has been used for each of the KICs, using the sub-indicator values transformed into z-values, which represent each KIC's key strengths.	
Share of indicated innovation ecosystems that cover RIS countries This indicator builds on the impact indicators described earlier on innovation ecosystems. It measures the extent to which RIS countries are covered/included in the innovation ecosystems created or strengthened with support from EIT KICs.	KIC self-reported data or specific studies. Data on the number of KIC entities, provided by the EIT. Previous assessments of KIC activities and impacts.	Similar to the previous indicator, the indicator is defined by a set of five sub-indicators. However, the only difference in the calculations is that for the sub-indicators Number of start-ups created, Number of start-ups supported, and Graduates from EIT-labelled programmes, only data for 2021-2023 is considered. This is because the EIT RIS was implemented on a voluntary basis during its first seven years, starting from 2014, when it was launched, and there was no obligation to report the data before 2021.	No information is reported by the KICs about the exact indicator, and thus, sub-indicators were used instead. Only data for 2021-2023 were used for the Number of start-ups created, the Number of start-ups supported, and the number of Graduates from EIT-labelled programmes. No information is available on a country level for the number of start-ups created, the number of start-ups supported, and Graduates from EIT-labelled programmes.
New jobs created in start-ups / scale-ups New direct jobs created in start-ups/scale-ups; New indirect jobs resulting from KIC-supported start-ups / scale-ups; New job types/families created in KIC sector; Number of persons employed in new job types: job type can include recently emerging job profiles, new job profiles, adapted job profiles and their related job family. Reported per country, including RIS countries.	Dealroom data on jobs created in start-ups and scale-ups supported by KICs. Data on supported start-ups and scale-ups and employed persons in them provided by EIT Food and EIT Urban Mobility. Previous assessments of KIC activities and impacts. KIC self-reported data and KIC-specific studies.	Dealroom data was checked and cleaned of duplicates. In the case of EIT Food and EIT Urban Mobility, the data provided by the KICs was added to the Dealroom data, and duplicates were removed. When a company was supported by more than one KIC, the support of both KICs was considered. Maximum employment in the period 2016-2025 was calculated for each company and summed up per KIC. Thus, possible fluctuations and decreases in the number of employees have been eliminated. The difference between the maximum and minimum employment was also calculated as another estimate of the KIC's possible net contribution. Employment was presented per country and analysed per regions (EU, RIS, EU non-RIS and other countries).	Not all companies supported by the KICs are registered in Dealroom. Data is missing for some companies and for some years. No information is available to distinguish between direct and indirect jobs. No information is available on the direct contribution of the KICs to the creation of new jobs.
Impact on employment growth as a result of a company being engaged with KICs	Dealroom data on jobs created in start-ups and scale-ups supported by	Dealroom data was checked and filtered by the following criteria: investor, data of first investment, HQ country of the company. Based on these criteria, two main cases were outlined.	Not all companies supported by the KICs are listed in Dealroom. Data is missing for some companies and for some years.

Percent and absolute (in FTE) contribution to employment growth of organisations trading or employing innovations (i.e., innovative services, products, technology or business models) developed with KIC support. This indicator will encompass both companies that were supported by KICs and companies that trade or employ innovations supported by KICs. Companies will be classified by countries (incl. EIT RIS countries).	KICs through investment or by other means. Data on supported start-ups and scale-ups and employed persons in them provided by EIT Food and EIT Urban Mobility. Surveys among ventures supported by KICs and KIC partners. Previous assessments of KIC activities and impacts.	In the first case, the focus was on companies for which the first year of EIT KIC's support was known. In this case, employment growth was assessed for the years following this first investment. Totals for employees in all companies supported by a given KIC were calculated. However, since data was missing for some of the years, another calculation was made, comparing the first announced employment data after the KIC's initial investment and the last announced employment data. Thus, we controlled for growth fluctuations caused by missing data. In the second case, where data about the first investment of EIT KICs in the companies was missing, employment growth was calculated for the entire period between 2016 and 2025. Once again, to control for missing information when calculating absolute and percentage growth, the first year when employment data was reported by a given start-up was compared to the last year with reported data. In cases where the difference between employees in the first and last year is negative (employment decrease), it is assumed that there was no impact, and employment growth is considered zero. For both cases, the employment growth was calculated for RIS and Non-RIS countries in order to assess geographical distribution.	No information is available on the direct contribution of the KICs to employment growth. Low response rate to the surveys among KIC-supported ventures and partners.
Number and type of jobs in existing businesses sustained through innovations Number and type of jobs safeguarded or replaced as a result of KIC activities that otherwise would have disappeared due to different skills or different ways of working needed, or external changes.	KIC final and seven-year review reports. KI self-reported data. Dealroom data on jobs created in start-ups and scale-ups supported by KICs, as well as data on the companies no longer in operation.	The available data from the various sources was analysed and triangulated. The Dealroom data on companies supported by KICs that are no longer in operation and their employees was used to calculate the jobs lost. The latest year's number of employees in companies supported by KICs for which data is available was compared to the maximum number of employees as an estimate of job sustainability.	Only limited data is available. Previous surveys show that it is difficult for companies to understand and report this indicator as they see their cooperation with the KICs as contributing to the creation of new jobs and transforming/upgrading jobs, not as a means to sustain existing jobs. The KICS share this understanding.
Revenue from the innovations launched on the market Total revenue from the innovations launched on the market for the reported	Ecorys, based on a survey among start-ups supported by KICs, as well as surveys carried out in mid-	The data derived from a survey among start-ups supported by KICs and surveys carried out in mid-2025 as part of the 7-year Review of EIT	Very low response rate in regard to the absolute annual revenue from the innovations launched on the market.

year in EUR. This indicator is directly linked to the one above and measures the revenue of innovations launched on the market, as reported by the indicator above. Supporting evidence: KIC LE Profit and Loss Statement (P&L) / Balance Sheet or a Statement signed by the KIC CEO/CFO instead. Markets to be defined per country (incl. RIS countries). The data should also include information on whether the innovation was supported through the HEI Capacity Building Initiative.	2025 as part of the 7-year Review of EIT Manufacturing and EIT Urban Mobility. Previous assessments of KICs' activities and impacts.	Manufacturing and EIT Urban Mobility were merged together, cleansed, and analysed. Data on ventures and partners that have either traded or used KIC-supported innovations, or know about other organisations using or trading them, was analysed. Data on the growth reported by these ventures and partners was also considered. A geographical analysis of the responses was performed to obtain information on the effects in RIS and non-RIS countries.	Uneven sample of responses for the different KICs.
Number and type of skill gaps and/or skill shortages filled by the KIC sector Number of KIC partners or employers in the KIC sector reporting a reduction in skills gaps through the employment of EIT beneficiaries, incl. graduates and/or reduced skill shortages in the labour market. Reported per country, including RIS countries.	Two surveys were carried out in mid-2025: one among ventures supported by the KICs and another among KICs' partners. The following KICs were covered: EIT Climate-KIC; EIT Digital; EIT InnoEnergy; EIT Health; EIT RawMaterials; and EIT Food. Data on EIT Manufacturing and EIT Urban Mobility provided by CSIL. The data was collected through separate surveys conducted as part of their 7-year performance assessment.	Two aspects of filling skill gaps have been analysed: • Filling skill gaps through employing KIC graduates and trainees based on responses to the question: "Has employing individuals trained by the KICs helped to fill skill gaps within your organisation?" • Filling skill gaps through participation in KIC provided education and training, based on responses to the question: "Has participation in KIC-provided education or training resulted in filling skill gaps in your organisation?" The data on ventures and KICs partners was analysed separately.	Low response rate of the surveys, and particularly to the skill gaps-related questions. Uneven sample of responses for the different KICs. Relatively more responses gathered by EIT Manufacturing and EIT Urban Mobility supported ventures and partners which dominate the overall assessments. The contribution of EIT Urban Mobility is reflected to a lesser extent in the assessment of the KICS' geographical impact on filling ventures' skill gaps, as only a limited number of respondents indicated the location of their venture.
Career growth of participants in EIT-labelled education Career growth is measured through steady progress of the job grade/level, satisfaction with work, contribution to creating impact, and an increase in salary/work conditions.	JRC survey among individuals engaged in KIC-provided education and training, including EIT labelled programmes.	The following data were collected through the survey: • Participants in EIT-labelled education have improved educational levels. Survey question: Qualification Awarded. • Satisfaction with the impact of the EIT labelled programmes in terms of developing skills, networking, or support needed for	There was a low response rate to the survey. A total of 297 responses were received, of which 257 related to EIT-labelled programmes.

Data to include links to the education activity–level (master, doctoral, professional, etc). and to be compared against the baseline-standard (average) results in the sector (against the non-EIT average).		entrepreneurship and innovation. Survey question: Overall, to what extent did the EIT labelled programme help you develop the skills, network, or support needed for entrepreneurship and innovation? • Annual net income increase of the EIT labelled graduates. Survey question: Annual net income after taxes and deductions in this position	
Students and graduates from EIT-labelled programmes who joined start-ups Number of students (also per country) who joined start-ups during their EIT Label MSc and PhD studies. Number of learners who joined start-ups as a result of their participation in other EIT-labelled activities up to 1 year after the activity ended. JOIN means join as an owner of an existing start-up or be employed by a start-up. Structured data: ○ Number of students who joined start-ups and their country of citizenship ○ In case of non-degree labelled activities, an explanation of the link between joining the start-up and the labelled education activity attended.	JRC survey among individuals engaged in KIC-provided education and training, including EIT-labelled programmes.	The following data collected through the survey were used: • Participants in EIT-labelled education who joined start-ups after graduation or during the programme, or created start-ups. Survey question: Have you joined a start-up following your participation in an EIT-labelled programme? • Participants in EIT-labelled education who launched an innovation within an already existing company or their own start-up after/during an EIT-labelled programme. Survey question: Have you launched any innovation (product, service, or technology) to the market, either independently or within an organisation? • Geographical distributions of the EIT-labelled programmes after/during which the participants joined start-ups after graduation or during the programme, or created start-ups.	Low response rate to the survey. 297 responses received in total, of which 257 related to EIT-labelled programmes. Uneven sample of responses for the different KICs.
EIT Label graduates employed Number of EIT Label Master and PhD graduates employed in a sector relevant to their Label degree and % of all EIT-labelled learners graduated the same year (by country of citizenship). Data to include EIT-labelled graduates employed before or offered employment prior to graduation and employed in a	JRC survey among individuals engaged in KIC-provided education and training including EIT-labelled programmes	The following data collected through the survey were used: • Participants in EIT-labelled education. Survey question: Qualification Awarded. • Graduates who are employed following an EIT labelled programme: Survey question: Company name.	Low response rate to the survey. 297 responses received in total, of which 257 related to EIT labelled programmes. Uneven sample of responses for the different KICs.

degree-relevant sector up to 3 years after graduation.		• Annual net income increase of the EIT labelled graduates. Survey question: Annual net income after taxes and deductions in this position.	
Total non-EIT financing generated by the KIC Legal Entity Total financing generated by the KIC LE in year N (absolute value in EUR). Sub-indicator: Financial sustainability (FS) coefficient (%) calculated as the total financing generated by the KIC LE divided by the total EIT grant in year N. Structured data to be provided: KICs' reports on FS and completed templates (financing sources presented per category, as per the adopted EIT legal package in Horizon Europe: 1) Contributions from partner organisations, forming a substantial source of funding (Unrestricted revenue to the KIC LE, such as membership fees, not co-financing of projects). 2) Voluntary contributions from Member States, associated countries or third countries or public authorities within them (revenue to the KIC LE or CLCs fully controlled by the KIC LE). 3) Contributions from international bodies or institutions (cash contributions, not grants or tenders won). 4) Revenue generated by the KICs' own assets and activities and royalties from intellectual property rights, broken down in the following categories: (a) ROI and Equity: revenue shares, license fees, exits from equity investments; (b) Education: revenues from Masters course, revenues from Doctoral courses, revenues from other education/training services; (c) Services and Consulting: revenues from	KIC self-reported data or specific studies. Data on the number of KIC entities, provided by the EIT.	The absolute non-EIT financing, generated by the KIC LEs for 2017-2023, was calculated. In addition, the Financial Sustainability (FS) coefficient (%) was analysed, calculated as the total financing generated by the KIC divided by the total EIT grant in year N. The following sources are considered non-EIT financing, contributing to the FS, as described in the Financial Sustainability Manual: a) Contributions from partner organisations, forming a substantial source of funding; b) Voluntary contributions from Member States, associated countries or third countries or public authorities within them; c) Contributions from international bodies or institutions; d) Revenue generated by the KICs' own assets and activities and royalties from intellectual property rights; e) Capital endowments; f) Bequests, donations and contributions from individuals, institutions, foundations or any other bodies established under national law; g) Financial instruments, including those funded from the general budget of the Union.	Geographical separation of the data is unavailable. There is no distinction between RIS and non-RIS countries. Data available for 2017-2023 only.

consulting or other services.5) Capital endowments.6) Bequests, donations and contributions from individuals, institutions, foundations or any other bodies established under national law. 7) Financial instruments, including those funded from the general budget of the Union.			

Societal impact analysis

Assessing the societal impacts of the EIT and its KICs poses methodological challenges. While the study has applied a structured approach and followed the EIT Impact Framework to ensure consistency, limitations should be considered when interpreting the findings.

The most fundamental limitation concerns the timing of impact measurement. Societal impacts from innovation support – such as environmental improvements, health outcomes, or systemic changes in education and skills – typically **take many years to materialise**. For several KICs of 2nd, 3rd, 4th wave, not enough time has elapsed to observe these effects in full. As a result, the evidence presented here should be understood as early signals of potential impact rather than definitive assessments of long-term outcomes.

The introduction of the new EIT Impact Framework in 2022 has created a discontinuity in the data series. Historical data for societal indicators are scarce or inconsistent, limiting the ability to track trends over time or to compare results across different programming periods. As a result, longitudinal analysis of societal impacts remains constrained.

Nevertheless, the study has adhered strictly to the EIT Impact Framework indicators. While this guarantees alignment with EIT monitoring and reporting systems, it also **constrains the scope of analysis**. Some relevant effects, particularly indirect or emerging societal impacts, may fall outside the framework and therefore remain unmeasured. This creates the risk of underrepresenting the full range of societal contributions made by the KICs. Also, the sampling of indicators was shaped by data feasibility. Some KIC-specific impacts were excluded because suitable data could not be identified or validated. This means that certain societal effects may be underrepresented in the study.

KICs differ in how they **operationalise** societal impact indicators, and in some cases, causal links between KIC activities and societal outcomes are difficult to establish. Broader or compound indicators, for instance, those relating to environmental performance, are influenced by a wide range of external factors beyond KIC interventions. As a result, attribution is challenging, and findings must be interpreted as indicative of contribution rather than direct causation.

Furthermore, societal indicators are reported unevenly across KICs, reflecting their diverse thematic orientations, levels of maturity, and internal monitoring capacities. Definitions, calculation methods, and reporting **practices vary**, sometimes substantially. This lack of standardisation reduces comparability across KICs and undermines the robustness of aggregate estimates.

A significant part of the evidence base for societal impact assessment comes from self-reported sources, including surveys, interviews, case studies, and KIC monitoring reports. While these provide valuable qualitative and contextual insights, they also **carry risks of subjectivity**, selective reporting, and response bias. This can lead to either over- or under-estimation of the actual societal impacts achieved, though this risk was actively addressed, to a degree possible, in the study.

Impact attribution

The economic impact attribution analysis has several limitations constraining the precision of the EIT economic impact attribution. Despite the robustness of the benchmarking approach, the available data, sourced primarily from Dealroom and KIC-provided datasets, was often incomplete or inconsistent regarding the nature and extent of EIT support. Particular investment amounts were usually unavailable, and it was frequently unclear whether ventures received direct financial investment, non-financial assistance (like mentoring, training, or in-kind contributions), or a combination of the two. This made it more difficult to pinpoint the exact causes of the observed performance outcomes and EIT interventions. Furthermore, benchmarking against other European and

international programmes was limited, considering the scarcity of detailed and comparable data reported by these programmes. Most of the initiatives report survival rates and profitability mainly, making cross-programme comparisons only partially representative.

For the societal impact attribution analysis, four main limitations emerged. Each societal impact indicator was limited by external factors, attribution complexity, scope limitations, and/or data/methodological limitations, as outlined in more depth below.

- External factors: Outcomes are influenced by conditions outside EIT's control, such as national policies, EU programs, market dynamics, and partner actions. These external drivers dilute the exclusive attribution of results to EIT interventions.
- Attribution complexity: Drawing direct causal links from EIT activities to long-term societal outcomes is challenging. Many indicators capture immediate outputs (e.g. partnerships formed, people trained) which do not directly translate to final impacts (like emissions reduced or jobs created) without contributions from other actors.
- Scope limitations: Several KPIs measure only a narrow aspect of impact (e.g. number of engagements, percentage increases from a low baseline), without reflecting quality, scale, or durability of the outcomes. High relative gains or large participation counts can be misleading if the baseline is low or if the metric ignores actual effectiveness and the magnitude of change.
- Data and methodological limitations: In various cases, the available data lack granularity and consistency, hindering precise attribution. Indicators often rely on self-reported or aggregated data without clear definitions or follow-up, tracking participation rather than outcomes. Some metrics lack transparency in methodology (e.g. what qualifies as "involvement" or how support is measured) and may even include data outside the intended scope, further clouding attribution.

Annex 2: Economic Impact Analysis methodology

Measuring the economic impact of KICs is based on quantitative and qualitative analysis of a set of KPIs defined in the EIT Impact Framework 2021-2027. The indicators were analysed following the Horizon Europe impact pathways as presented in Table 147:

Table 147. Horizon Europe pathways and the respective EIT KPIs, intended to measure KICs' contribution

Horizon Europe impact pathway	EIT Impact Framework 2021-2027 KPIs
Generating innovation-based growth	Contribution to revenue growth of organisations trading or employing innovations developed with the KIC support. Number and revenue of start-ups and scale-ups supported by KICs trading 3 years after KIC support ceased. Visible innovation ecosystems not previously in existence. Share of the indicated innovation ecosystem that covers RIS countries. Revenue from the innovations launched on the market.
Creating more and better jobs	New jobs created in start-ups / scale-ups. Impact on employment growth as a result of the company being engaged with KICs. Number and type of jobs in existing businesses sustained through innovations. Number and type of skill gaps and/or skill shortages filled by the KIC sector. Career growth of participants in EIT-labelled education. Students and graduates from EIT-labelled programmes who joined start-ups.

	EIT Label graduates employed.
Leveraging investments in R&I	Total non-EIT financing generated by the KIC Legal Entity.

Source: Ecorys

Data was collected through extensive desk research of EIT centrally collected data, KICs reports, information provided by KICs, previous evaluations and surveys, and Dealroom data on supported companies.

In addition, a survey was conducted among KIC partners and supported start-ups and scale-ups. The purpose of both was to better understand how these partnerships/support forms have contributed to innovation, organisational development, skill building, and broader economic and societal outcomes. They were considered a supplementary source of information for the economic impact assessment (through questions on company growth) and for the societal impact assessment. In essence, surveys are treated as a "third leg" of triangulation, which would allow more well-rounded, complete data. This would be of special importance at the stage of attributing the EIT influence on achieved impacts, which was covered by subsequent stages of the study.

Because of ongoing 7-year assessments of the EIT Manufacturing and Urban Mobility, the contractor launched surveys of a similar scope for this assignment. Nevertheless, the questionnaires for the surveys were discussed to be aligned with the survey launched as part of this study. Table 148 summarises the contents of the survey

Table 148. Summary of the survey for partners and ventures supported

Overview of the survey contents	
Survey for ventures supported	**Survey for partners**

• Profile of the venture (type, age, sector, country).
• Type of EIT KIC support received (e.g. funding, mentoring, training).
• Outcomes of support in terms of: Innovation development and adoption; Revenue and employment growth.
• Impact on skills (via hiring or training).
• Collaborations formed through the KIC ecosystem.
• Perceived societal and environmental contributions (e.g. CO_2 reduction, sustainability, resilience).
	• Profile of the organisation (e.g. HEI, company, public body).
	• Nature of engagement with EIT KICs (partnership roles and activities).
	• Outcomes of collaboration in terms of:
	  ○ Employment and revenue growth.
	  ○ Use or promotion of KIC-developed innovations.
	  ○ Upskilling and addressing labour market needs.
	  ○ New partnerships and ecosystem participation.
	  ○ Wider impacts on the sector and society (e.g. innovation diffusion, addressing climate and resource challenges).

Source: Ecorys

The analyses applied a mixed-methods approach, supplementing quantitative data with qualitative evidence and combining data sources to create the most comprehensive picture possible of the observed impacts.

The impact was considered in terms of KICs (sectors) as well as in terms of geographical coverage, considering EIT RIS countries and non-RIS countries.

To support the assessment of the KICs' impact on the establishment of visible innovation ecosystems, we developed a multidimensional approach for representing the indicator through several sub-indicators: number of entities established by the KIC, number of active partners, number of start-ups created, number of start-ups supported, graduates from EIT-labelled programmes.

The final values were estimated by transforming and standardising the values for each sub-indicator into z-values and, thereafter, converting them into values from 0 to 100 (where 0 is the KIC with the lowest score for the

respective sub-indicator and 100 is the KIC with the highest score). Thus, we highlighted the areas in which each KIC has the highest or the lowest contribution in establishing innovation ecosystems.

Annex 3: KIC Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

The following Annex includes summaries of the KICs' Strategic Objectives and intended impacts as per the Strategic Agendas of each KIC (annexes to them) and the EIT Impact Framework, which support the analysis included in the Societal Impact Analysis. All the data in the tables comes from those two sources alone, and the source of each data is indicated in the table.

Table 149. EIT Climate-KIC – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Target (SA)	Strategic Objectives (SA)[811]	SDG (SA)	Societal and economic impact to be created by 2027 (SA)	Impact KPI (SA)	Matching impact KPI definition (IF)[812]
Helped Europe avoid over 500 million tons (CO_2eq) of emissions.	A. Focus on systems innovation to address systems needing change to tackle emissions and improve resilience.	13.1 13.2 11.5	Slowing emissions in partnership with EIT Climate-KIC countries and sub-national places (cities, regions)	Avoided or sequestered greenhouse gas emissions measured as MT CO_2 equivalent (cf. baseline year) in places where we work. # People with strengthened climate resilience in places where we work. Avoided or sequestered greenhouse gas emissions measured as MT CO2 equivalent (cf. baseline year). # People with strengthened climate resilience.	
Strengthened the resilience of 10 million people to the impacts of climate change.		13.1 13.2 11.5	Strengthened resilience to the unavoidable impacts of climate change (helping communities mitigate against the impacts of climate change through better understanding, preparation, and management of climate risks, and developing solutions for transformative adaptation)		
Leveraged over EUR 100bn to support the scale-up of innovations to tackle climate change.	E. Funding for innovation	13	Innovation can help de-risk investments, attract private money and speed up the transformation.	# Billion Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change.	**Euros leveraged to support the scale-up/diffusion of innovations to tackle climate change.**

[811] The link between the target and Strategic Objective was established by Ecorys, and is not included in this format in the strategic documents.
[812] The link between the impact KPI (EIT Impact Framework) and the target included in the Strategic Agenda was provided by Ecorys, and is not included in strategic documents in the same way.

				# and revenue of start-ups and scale-ups supported by KIC trading 3 years after KIC support ceased KIC Revenues (EITHE11.1) to enable KIC and the KIC Community to deliver on our impact thesis.	
Generated 50 000 green jobs.	D. Supporting the creation of net new climate-friendly jobs.	13.1 8.2 8.3 8.4 8.6	Expanding the availability of new climate-friendly jobs	**Combined # new jobs created in start-ups/scale-ups, and # jobs/employment in existing businesses, partners sustained through innovations.**	
Became the strategic partner of choice for over 100 cities, regions, countries and large-scale businesses across Europe, orchestrating change through innovation to achieve net-zero emissions and climate resilience.	B. Sustainable innovation ecosystems	8.3 8.4 13.2 13.3	Examples of cities, regions, countries, and large-scale businesses that have succeeded in an ambition to tackle climate change at the speed and scale needed. (Such cases are also aligned to our strategic objective of changing cities, land-use, materials, and finance systems.)	**# of places/challenge owners with an agreement to work in partnership with EIT Climate-KIC to achieve rapid decarbonisation and resilience.**	
Enhanced the innovation and entrepreneurial skills of over 200 000 people across Europe, equipping them to be climate leaders, including supporting 1 260 EIT Label graduates and 82 Higher Education Institutions.	C. Next-generation climate entrepreneurship, leadership, and capability.	4.7 8.3 8.4	EIT Climate-KIC will help Europe expand its conception of "impact" beyond greenhouse emissions reductions to better reflect the systemic nature of climate change and the many environmental and social objectives set out in the Paris Agreement and the European Green Deal.	# of people with enhanced innovation and entrepreneurial skills # and type of skill gaps/or skill shortages filled by KIC/sector (noting skills gaps on climate action leadership, circular economy, green building design etc).	

Table 150. EIT Digital – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Strategic Objective	SDG (SA)	Societal impact to be achieved by 2027	Impact KPI (SA)	Matching impact KPI definition (IF)
Building world-class European industry players in digital	9, especially 9.3	Increasing the access to high-speed networks and strengthening the role of European digital companies deploying high-speed networks (fixed and mobile, e.g. 5G) provision.		% of high speed network world market share by the providers from the EU
	9, especially 9.3	Strengthening the economic impact of EU digital firms through increasing the share of exports of their digital services to non-EU markets		% of services of firms involved with EIT Digital (start-ups, scale-ups, partners) exported to non-EU markets
Increased EU Member States digital competitiveness	8, especially 8.3	Increased competitiveness of EU Member States with a special focus on countries with a DESI (Digital Economy and Society) score <50		**Level of participation of Member States with DESI lower than 50 in EIT Digital Activities (e.g., through RIS programme)**
	8, especially 8.3	Increased centrality of organisations from the Widening Countries (or countries with DESI below 50) in EIT Digital activities (based on Network analysis)		Extent to which the Widening Countries (or countries with DESI below 50) are more central in EIT Digital activities (based on Network analysis) compared to 2021 baseline
Increased societal and economic impact from European Digital R&D investments in areas strategic for Europe	8, especially 8.2, 8.10, 11, especially 11.2, 11.6, 3, especially 3.4	Bring deep tech digital R&D results to the market in areas strategic for Europe: Digital Industry – the digital transformation of the industry, from production to logistics to retail; Digital Wellbeing – safeguarding health for the youth, the working professional and the elderly by analysing sensor data; Digital Finance – the disruption of digital transactions and institutions with technologies that allow transparency, efficiency, security and trust; Digital Cities – serving the cities with digital technologies addressing urban mobility, citizen inclusiveness and engagement, and city safety; Digital Tech – inventing the digital future with core technologies providing secure, robust, responsive and intelligent communications and computation.		Market uptake and accumulated turnover of EIT Digital innovative products and services and accelerated scaleups: • data platform-based sustainable digital industry solutions. • digital wellbeing solutions for quality-of-life improvement through sensing and data analysis. • sovereign embedded payment solutions in digital finance. • "city as a data platform"-based solution for sustainable cities. • trusted and secure IoT, data sovereignty and Artificial Intelligence based solutions.
A European higher education system delivering	4, especially 4.3, 4.4, 4.5 8, especially 8.6	Increased digital talent development in Europe by transforming the European ICT Master and Doctoral Programmes with a stronger focus on societal needs and on entrepreneurship		**Adoption of the EIT Digital Master School model, Industrial Doctoral School model and EIT Quality label European Technical universities**

entrepreneurial digital skills	4, especially 4.4	Increased digital upskilling of European professionals to build the competencies needed to keep pace with fast-paced digital technology development	**Number of EIT Digital Professional and Online learners** **Number of new micro-credentials developed by EIT Digital-supported universities**
	4, especially 4.5	Increased gender equality in digital education in Europe	**% of women students in EIT Digital programmes** **Average DESI for Human Capital development in Europe**
Bring European values to the digital world	17, especially 17.8, 17.14	Supporting European regulation and digital standards that address key European values such as ethics of AI, data protection, and trusted social media platforms	Deployment of an effective thought leadership and policy support capacity demonstrated by uptake and adoption (by governments, EC and other governmental organizations) of EIT Digital initiatives, policy recommendations and publications (e.g., Makers and Shapers journey, policy reports on Digital Industry, Cybersecurity and AI) **Presence of EIT Digital partners among the European Digital Innovation Hubs**
	8, especially 8.3	Increased influence of EIT Digital on Digital Innovation Hubs	

Table 151. EIT InnoEnergy – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Strategic Objective (SA)	SDG (SA)	Societal impact to be achieved by 2027	Impact KPI (SA) Matching impact KPI definition (IF)
SO1: Decrease the GHG emissions	7, 9, 11, 12 13	Promoting sustained, and clean economic growth	GigaTons of CO2 saved
SO2: Decrease cost of energy	7, 9, 13	Decreasing the costs of energy	Money saved by substituting existing technologies by InnoEnergy assets (EUR million)
SO3: Increase the operability of the energy system	7, 9, 11, 12	Increasing the availability of the innovative energy	TWh generated from renewable sources based on InnoEnergy innovations

SO4: Job creation (or maintenance)	5, 4, 8	Ensuring the workforce in the InnoEnergy field Promoting gender balance in the InnoEnergy sector	# and type of skill gaps and/or skill shortages filled to accelerate the energy transition # students working/leading new ventures % of alumni who continue their work in the InnoEnergy field, battery sector **The survival rate of a venture managed by a woman entrepreneur (in %)** **Investment attracted by women entrepreneurs (in MEUR)**
SO5: Growth	1, 7, 10, 8, 9	Increasing the availability of the innovative energy Pooling resources for InnoEnergy sector's growth	**People with access to energy in developing countries thanks to InnoEnergy deployed assets** **External funds raised by supported assets (where InnoEnergy has a financial interest (equity of return on sales)** **The value-added of the InnoEnergy KIC, as reported in the financial statements (in MEUR)**

Table 152. EIT Health – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

KIC Strategic Objective	SDG (SA)	Societal and economic impact to be created by 2027 (SA)	Measures of societal impact (SA)	Impact KPI (SA and Matching impact KPI definition IF)
Better Health	3, especially 3.4	Citizens and patients involved in seeking solutions for multi-morbid and chronic conditions (societal)	# Patients impacted: number of people with a pre-existing health condition (i.e. patients) that experience an improvement in Quality of Life (QoL) and/or Life Years Gained (LYG)	**# citizens and patients involved (ideation, co-creation); where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)**
	3, especially 3.4	Citizens and patients benefitting from EIT Health products and services (**societal**)	# Citizens leading healthier lives: number of citizens who have adopted a healthier lifestyle after having taken part (e.g. in an innovation project or education programme) or having benefited from a product, service or process generated	# citizens and patients benefitting from products & services; where (and if) possible, per disease areas (such as cancer) and range of application (prevention, diagnosis, treatment)

			with EIT Health support (demonstrated e.g. by sales).	
Sustainable Health Systems	3, especially 3.8	Creating sustainable healthcare systems (**societal**)	# upscaled projects that strengthen healthcare systems through (cost) efficiency gains. Measures how well inputs (resources such as number of hours worked by e.g. health care staff, facilities, health care interventions) are used to produce outputs (e.g. health outcomes, survival, QoL). Efficiency measurement identifies "best practice" and makes it possible to free up resources to be used elsewhere (to the benefits of patients). Such gains may be the result of new collaborations, new players, new payment models etc. Scalability is a key aspect of these projects. **# upscaled projects that make healthcare more agile through the adoption of digital tools.**	# upscaled projects that strengthen healthcare systems through (cost) efficiency gains and/or by improving the individual experience of care
	3, especially 3.8	Creating structured processes for the accelerated implementation and scaling up of innovations, using digital tools (**societal**)		**# upscaled projects that make healthcare more agile through structured (digitised) processes**
Competitive Health Economy	8	Creating new jobs with a better capacity to take up innovations (economic)	Generating innovation-based growth # Products/services launched (also part of CORE KPI, cf. table 4.1) # Projects/start-ups that achieve multi-country implementation/market entry Creating more and better jobs and training the people to do these # New jobs created in start-ups/scale-ups	# New jobs or employment created in new businesses
	8	Creating new jobs with a better capacity to take up innovations (economic)		# New jobs or employment created, sustained, reformulated or upgraded in existing businesses
	8	Innovations launched on the market (based on KIC support) (economic)		# Products/services launched

	8	Innovation ecosystems are created, and they evolve into public-private business ecosystems (economic)	# and type of jobs and/or employment in existing businesses # Professionals/graduates completing training/education programme	# Solution / products / services that achieve multi-country implementation / market entry / scaling
	8	Increased entrepreneurial and innovation competency supporting innovation-based growth (economic)	Leveraging investment in Research and Innovation EUR Investment attracted	# Prof/graduates completing training/education programme (including those starting their own business)
	8	Investment attracted by start-ups and scale-ups supported by KICs (including to roll out innovations into routine care and reimbursement schemes) (economic)		EUR Investment attracted (including to roll out innovations into routine care and reimbursement schemes)

Table 153. EIT RawMaterials – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Strategic Objectives (SA)	SDG (SA)	Societal and economic impact to be created by 2027 (SA)	Impact KPIs (SA)	Matching impact KPI definition (IF)[813]
Securing raw materials supply)	9.1-5, 12.4-8	Business creation	Investment attracted in resources	
	9.1-5, 12.4-8	Improve industrial competitiveness	Savings and increases in sales	
	9.1-5, 12.4-8	Infrastructure investment	New pilot/demo plants, prototypes	
	9.1-5, 11.2, 11.3, 12.4-8	Raw materials concentrate produced	Percentage increase	**Percentage increase in raw materials concentrate produced**
	8.4	Integration of the RIS region	% funding to RIS in non-RIS projects	
	4.4, 4.7	Ensure stable RM workforce	Created/maintained/re-skilled jobs	
	4.3, 4.5, 5.5	Improve gender balance	Women graduating from RM courses	

[813] The link between the Impact KPI in the Strategic Agenda and the corresponding KPI in the Impact Framework was established by Ecorys.

	7.2, 7.3, 11.2, 11.3, 13.2	Carbon savings	% CO2 emitted savings	
Designing materials solutions	9.1-5, 12.4-8	Business creation	Investment attracted in resources	
	9.1-5, 12.4-8	Improve industrial competitiveness	Savings and increases in sales	
	9.1-5, 12.4-8	Infrastructure investment	New pilot/demo plants, prototypes	
	8.4	Integration of the RIS region	% funding to RIS in non-RIS projects	
	4.3, 4.5, 5.5, 12.4-8	Improve gender balance	Women graduating from RM courses	
	7.2, 7.3, 11.2, 11.3, 12.4-8	CRM substitution/reduction	Number of cases	**Number of cases or critical raw materials substitution/reduction**
	9.1-5, 11.2, 11.3, 12.4-8	Advanced materials produced	Percentage increase	**Percentage increase in advanced materials produced**
	9.1-5, 11.2, 11.3, 12.4-8	Advanced materials development	Number of new advanced materials	**Number of new advanced materials developed**
	7.2, 7.3, 11.2, 11.3, 12.4-8	Advanced materials development	**Improved products with less toxic materials**	
	4.4, 4.7	Ensure stable RM workforce	Created/maintained/re-skilled jobs	
	13.2	Carbon savings	% CO2 emitted savings	
Closing materials loops	9.1-5, 11.2, 11.3, 12.4-8	Infrastructure investment	New pilot/demo plants, prototypes	
	8.4	Integration of the RIS region	% funding to RIS in non-RIS projects	
	4.4, 4.7	Ensure stable RM workforce	Created/maintained/re-skilled jobs	
	4.3, 4.5, 5.5	Improve gender balance	Women graduating from RM courses	
	9.1-5, 12.4-8	Business creation	Investment attracted in resources	
	9.1-5, 12.4-8	Improve industrial competitiveness	Savings and increases in sales	
	9.1-5, 11.2, 11.3, 12.4-8	Increased recycling rate over current rate	Recovery of selected CRM	
	6.3, 6.4, 12.4-8	Enhanced sustainability	% new and existing processing plants with reduced discharge	

	9.1-5, 12.4-8	Enhanced sustainability	% European companies using sustainability standards
	7.2, 7.3, 11.2, 11.3, 13.2	Carbon savings	% CO2 emitted savings

Table 154. EIT Food – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Strategic Objective (SA)	Impact Goal(s) (SA)	Farm to Fork Strategy Goal(s) (SA)	SDG (SA)	Societal impact to be created by 2027	Actions (SA)	Impact KPI (SA)	Matching impact KPI (IF)
SO1: Address low consumer trust in food	Improving Trust Conditions	Promote sustainable food consumption & shift to healthy, sustainable diets	2, 3, 4, 12, 13	Improvement in conditions for enhanced public trust arising from participation in the food system - Increased public engagement in food system	SO1.1: Develop citizen participation across food supply network; SO1.2: New communication culture to reach EU citizens	**# people taking part in EIT Food co-creation activities**	
SO2: Enabling healthier and more sustainable individual consumer choice	Improving Trust Conditions; Dietary Impact	Promote sustainable food consumption; Stimulate sustainable food processing, retail	2, 3, 12, 13	Reduction in relative risk of obesity and Non-Communicable Disease (NCD) prevalence in target populations through increased intake of foods with a healthier nutritional profile	SO2.1: Informed consumer choices; SO2.2: Superior nutritional composition via innovation; SO2.3: Convenient individualisation	Number of consumers using EIT Food-supported technology, products, or guidance to personalise or change their diet in line with relevant Food-Based Dietary Guidelines for Europe	
				Reduction in relative risk of obesity and Non-Communicable Disease (NCD) prevalence in target populations due to known dietary factors		**Number of EIT Food-supported products on the market with reduced levels of salt, free sugars, trans and saturated fats meeting or falling below recommended Food-Based Dietary Guidelines for Europe, or with an improved nutritional profile**	
SO3: Build consumer-centric	Improving Trust Conditions;	Promote sustainable	2, 3, 12,	Improvement in conditions for enhanced public trust through	SO3.1: Develop integrated digital		

connected food system	Dietary Impact; Improved Environmental Impact	food consumption; Combat food fraud along supply chain	13, 14, 15	participation in the food system, increased adoption and uptake of innovation, and improved food safety and security	supply network; SO3.2: Improve transparency & integrity	**# new digital solutions in use to improve supply chain efficiency, integrity and/or transparency**
				Reduction in relative risk (R) of obesity & Non-Communicable Disease (NCD) prevalence in target populations due to known dietary factors – Improved Food Safety & Security		
SO4: Enhance sustainability via resource stewardship	Improved Environmental Impact	Reduce food loss & waste	2, 3, 6, 7, 11, 12, 13, 14, 15	Improved Environmental Impact of Agri-Food systems	SO4.1: Tackle environmental hotspots; SO4.2: Alternative sustainable ingredients; SO4.3: Circular excellence by valorising side streams	Volume reduction in CO2 equivalent tonnes from Agri-Food system
				Improved Environmental Impact of Agri-Food systems – Improvement in impact on ecosystems due to factors identified as EU Green Deal and/or CAP targets (inter alia water quality and use; use of chemical pesticides; antimicrobial use; nutrient loss; biodiversity protection) Reduction in Food Waste & Food Loss		**# EIT Food supported products on the market derived from alternative sources (e.g., alternative proteins; new plant varieties; alternative production techniques, etc.)** **# new products or processes launched with EIT Food support using revalorised &/ or reintegrated food system side-streams and waste streams**
SO5: Educate to engage, innovate & advance	Circular, Sustainable Economy	Enable the Transition	4, 5, 8, 9, 10	Enabling Transition to a Circular & Sustainable Economy	SO5.1: Demand-driven higher education; SO5.2: Entrepreneur education; SO5.3: Build HEI innovation capacity	% of alumni of KIC Education activities retained in the food system # new skills and professions developed

Table 155. EIT Manufacturing – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

Strategic Objective	SDG (SA)	Societal impact to be achieved by 2027	Impact KPI (SA) Matching impact KPI definition (IF)	Old SA Impact KPI
SO1: Put people at the center of manufacturing innovation (Old SA: SO1: Competitive Manufacturing Skills and Social Sustainability)	4, especially 4.3, 4.4, 4.5, 4.7 5, especially 5.b 8, especially 8.5, 8.6 10, especially 10.2	A strong European talent pool with skill levels that make our industry competitive on a global scale. Transversal and flexible skills in line with changing job market requirements.	**% of upskilled employees working in the manufacturing sector**	% of highly qualified employees working in the manufacturing sector reaches 30% (24% in 2017) # and type of skill gaps and/or skill shortages filled by KIC sector
		In first step focusing on gender balance, reaching a strong women impact on the European Manufacturing innovation and Start-up arena	**% of women-led startups in manufacturing** **% of women-led consortia in funded innovation activities**	**Share of women (25-64) scientists and engineers in manufacturing at least 30% (baseline 20% in 2018)** **Women Board Members in Manufacturing companies above 40% (baseline 31.2% in 2020)**
		Manufacturing as the go-to-job for creative and innovative people of all ages, genders and physical capabilities. Best possible use of automation to support humans in the workplace. Citizens that feel safe, empowered, inspired and innovative at work.		Assessed attractiveness of workplaces in manufacturing among KIC partner employees is increased by 20%.
SO2: Accelerate green Manufacturing (Old SA: SO2: Powerful Manufacturing Innovation Ecosystems)	7, especially 7.3 and 7.a 8, especially 8.2 9, especially 9.4 12, especially 12.2 and 12.5 13, especially 13.3	Europe's manufacturing industry is a role model in terms of circular product design. Products manufactured in Europe are easier to maintain and repair, upgrade and recycle than those produced elsewhere. Europe is the world market leader for circular economy processes and technologies.	% circular material use rate	
		Additional value is created through open innovation activities and by merging creative engineering and business		# of pre-existing (already documented) dynamic innovation ecosystems evolving into business ecosystems

	17, especially 17.7	expertise in hotspots to solve the European industries' problems. Well-functioning networks for disruptive innovation along and across supply-chains.		# of Visible innovation ecosystems not previously in existence
		Attractive open regional arenas, empowering ideas that satisfy industry needs and allow venture capital to flow into emerging and growing companies.		Manufacturing value added (share of GDP) exceeds 16% (baseline 14% in 2018) # New jobs created in Start-ups/Scale-ups # and revenue of Start -ups and Scale-ups supported by KICs trading 3 years after KIC support ceased
		Worldwide, Europe is the first continent to become climate-neutral and has the highest share of production facilities with a net zero-carbon footprint.	Reduction of GHG emissions compared to 2005	
SO3: Foster sovereignty and Competetiveness (Old SA SO3: Globally Competitive and Resilient Manufacturing)	9, especially 9.1, 9.2, 9.3, 9.5, and 9.b 17, especially 17.6, 17.16, and 17.17	European industry is the global innovation hotspot for manufacturing technology and solutions and a core engine of societal growth.	**Revenue growth in manufacturing** **# New jobs created in supported Start-ups/Scale-ups**	
		European industry is the global innovation hotspot for manufacturing technology and solutions and a core engine of societal growth and persistence. Highly versatile manufacturing companies and supply chains across all European countries that outperform other global regions as a team, especially with regards to customised small or single batch production.		Manufacturing value added (share of GDP) exceeds 16% (baseline 14% in 2018) The development of European Manufacturing value added outperforms those of other regions, specifically North America and China
SO4: Environmental		Europe's manufacturing industry is a role model in terms of circular product design. Products manufactured in Europe are easier to maintain and repair,		Circular material use rate in manufacturing sector exceeds 15% (baseline 11% in 2014)

ly Sustainable Manufacturing	upgrade and recycle than those produced elsewhere. Europe is the world market leader for circular economy processes and technologies.		
	Worldwide, Europe has the highest share of production facilities with a net zero-carbon footprint.		Reduction of GHG emissions in non-ETS industry by at least 25% (compared to 2005
SO5: Manufacturing fit for the Digital Age	European manufacturing companies make extensive use of industrial data and digital business platforms and manage their supply chains and customers in digital eco-systems.		**# of participating companies increasing digital maturity**
	Efficiency, flexibility and eco-friendliness in manufacturing is high through the application of digital technologies over the whole product cycle.		

Table 156. EIT Urban Mobility – Strategic Objectives and intended impacts as per the Strategic Agenda and the EIT Impact Framework

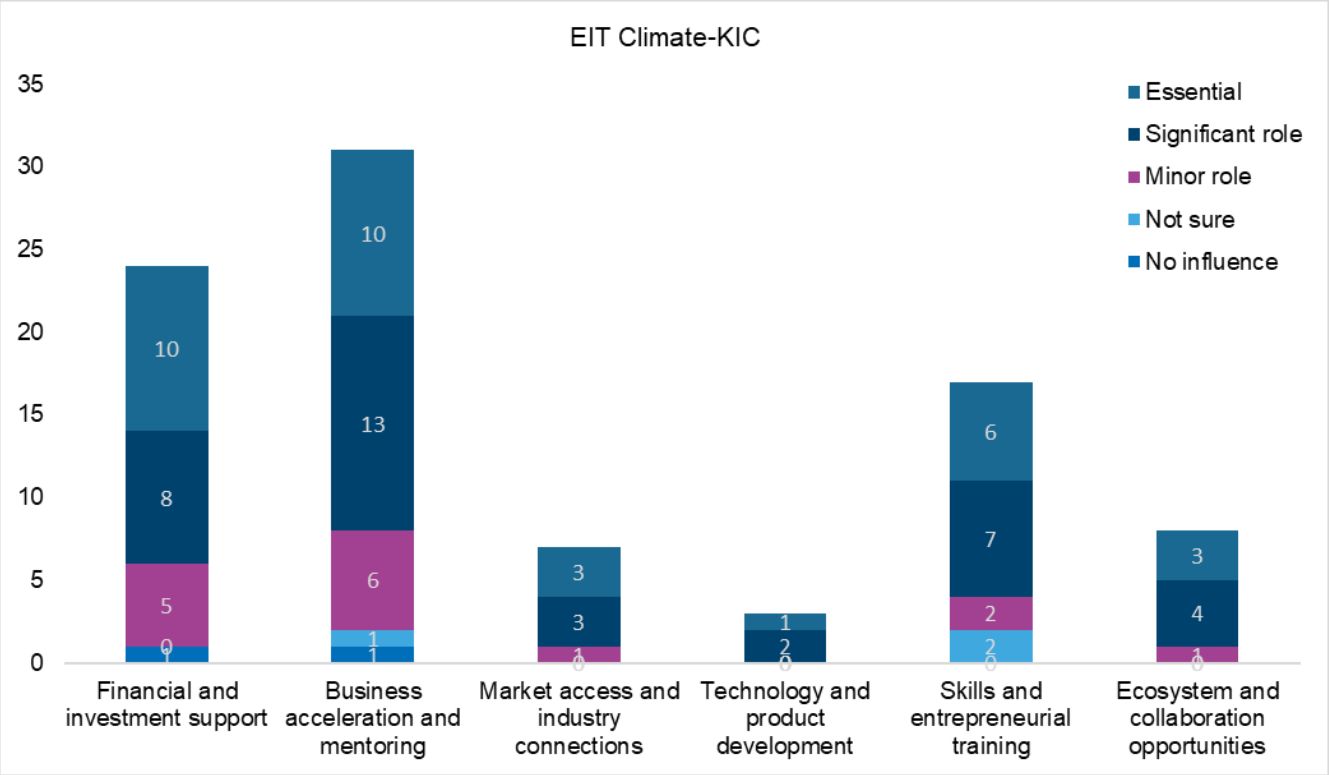
Strategic Objective	SDG (SA)	Societal impact to be achieved by 2027	Impact KPI (SA)	Matching impact KPI definition (IF)
S01-Create liveable urban spaces	11.2 11.7	Improve the quality of public space design and public infrastructure to encourage active modes and enhance the use of other alternative modes to motorised individual traffic. Introduce more green and blue elements to address climate emergency. Create the conditions through projects for public space to improve social inclusion and community cohesion.	# Public realm improvements (KSN03) Improved quality of public space design and public infrastructure to encourage active modes and enhance the use of other alternative modes to motorised individual traffic. More green and blue elements introduced to address climate emergency. Conditions created through projects for public space to improve social inclusion and community cohesion.	

		Repurposing traffic road space to public places which encourage healthy and clean mobility and new flexible uses that could benefit urban liveability, the local economy and the environment. Improve the quality of public space for healthy lifestyles and mobility habits, and enhance accessibility for all. Develop new forms and flexible models of urban road space use.	Repurposed traffic road space to public places which encourage healthy and clean mobility and new flexible uses that could benefit urban liveability, the local economy, and the environment. Improved quality of public space for healthy lifestyles and mobility habits and enhance accessibility for all. New forms and flexible models developed of urban road space use. Road space reallocation to public space.	
	3.9	A modal shift to clean and healthy mobility alternatives to motorised transport. Reduce emissions from urban logistic operations by introducing new technologies and cleaner solutions.	City Club city inhabitants exposed to emissions in urban areas (derived from road transport)	
SO2-Close the knowledge gap	4.4	Creating new competencies that match future needs for the mobility sector including data management, software development, new transport fuels and modes of transport, innovation and entrepreneurship.	# Participants in non-degree education and training	
	8.1	Creating new competencies that match future needs and creating new solutions that can be implemented on the ground.	# Start-ups created of EIT labelled MSc/PhD programmes	
	4.4 13.1	Creating new competencies that match future needs for the mobility sector and respond to city challenges.	**# New courses developed**	
SO3-Deploy green, safe, inclusive mobility solutions for people and goods	11.2 11.6 11.7 13.2	Delivering on the impact of reducing GHG emissions and creating liveable urban areas through implementation and scaling of solutions.	**# Innovation pilot scalings (KSN01)**	
	11.2	Moving away from investments and incentives benefiting individual motorised transport towards an increased share of public-private investments and incentives for sustainable urban mobility measures and services.	**Mobilised funding on sustainable mobility infrastructure**	
	11.2 11.6 11.7 13.2	Designing and testing new innovations that support the paradigmatic shift away from car-dependent urban mobility to people-centred urban accessibility.	# Designed/tested innovations	

SO4-Accelerate market opportunities	11.2 11.6 11.7 13.2	Creating marketed innovations that can be implemented enables the longer term and economic sustainability of solutions, which delivers on impact.	# Marketed Innovations	
	8.1	Supporting new market opportunities developed and newly emerging players in the urban mobility industry and ecosystem.	# Supported start-ups/scale-ups	
SO5-Promote effective policies and behavioural change	11.3	Increased citizen involvement and level of active participation in decision making and co-creation of urban mobility solutions	**# Demonstrations/pilots/ living labs within a project that actively involve citizens and/or local associations (KSN02)**	
	3.9 9.1	Mode share is a commonly used indicator that measures the impact of a city's policies on travel behaviour. As a result of continued investment in sustainable mobility, the KIC will contribute to increase the mode share of walking, cycling, public transport use combined and reduce individual motorised transport	Modal share of sustainable mobility. As a result of continued investment in sustainable mobility, the KIC will contribute to increase the mode share of walking, cycling, public transport use combined and reduce individual motorised transport.	

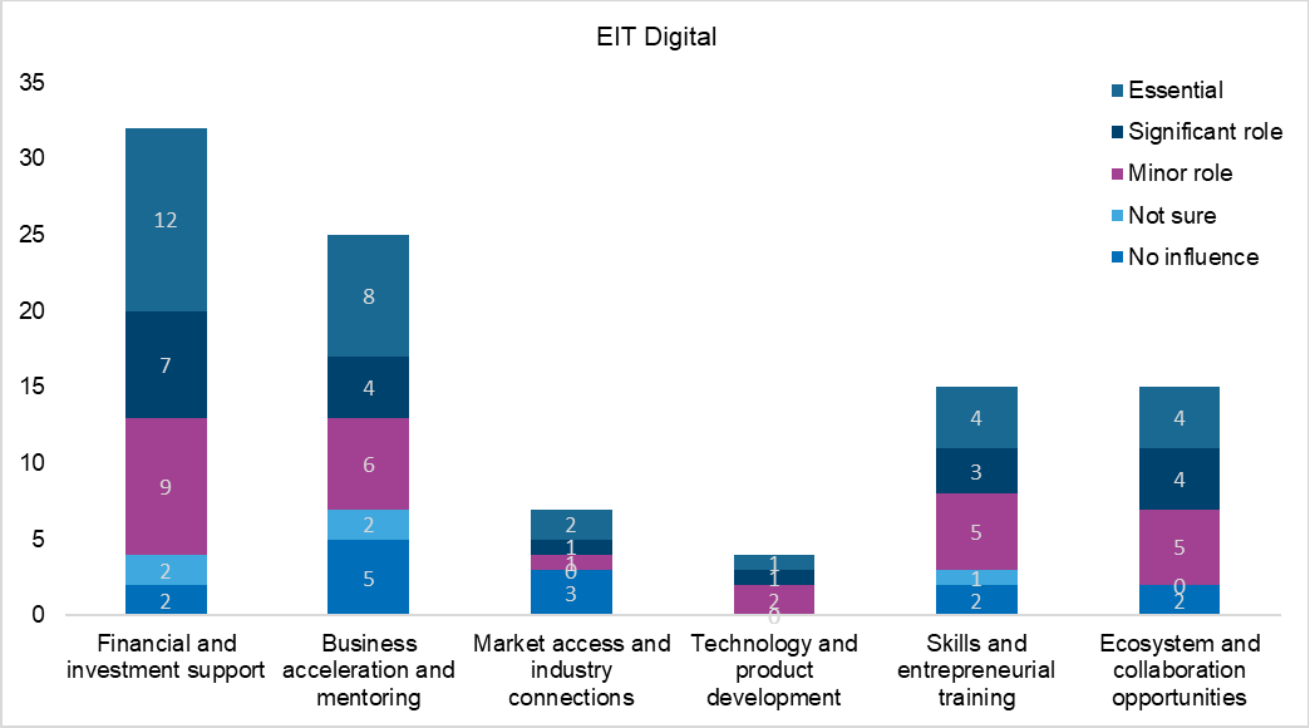
Annex 4: Survey results by KIC

Figure 79. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Climate KIC



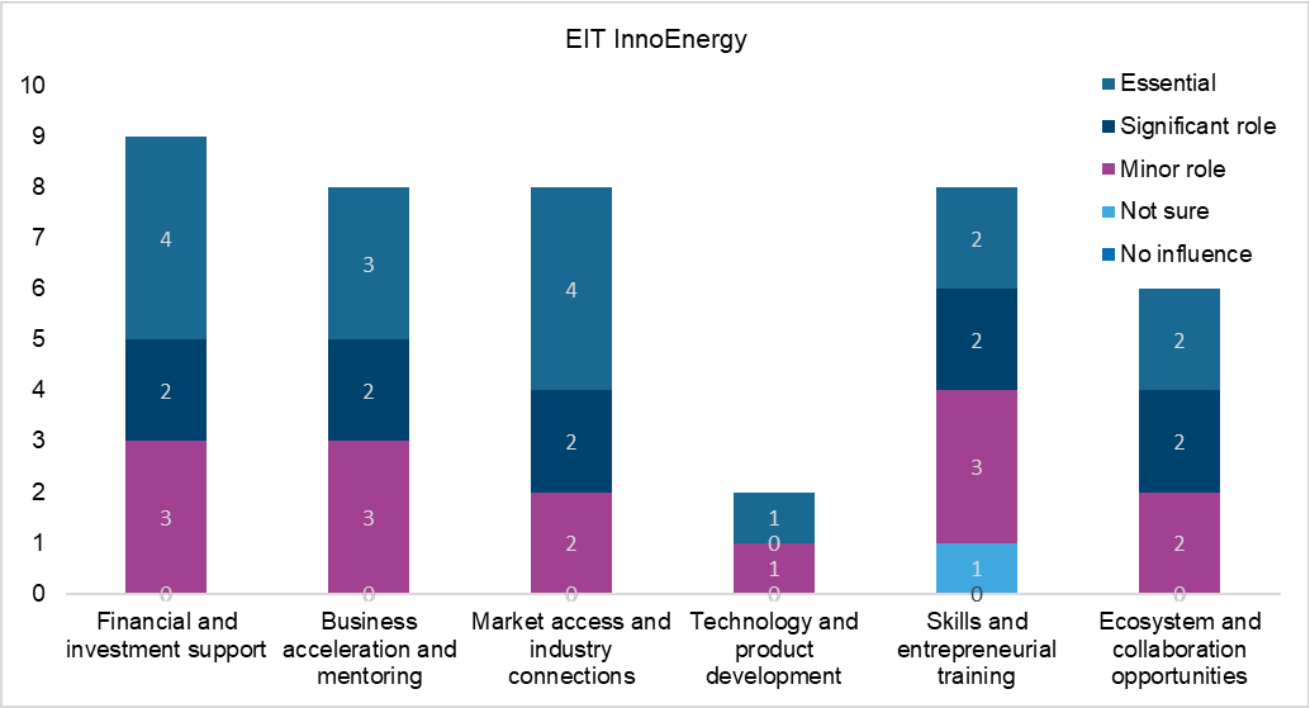
Source: Ecorys, based on the survey with ventures supported

Figure 80. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Digital



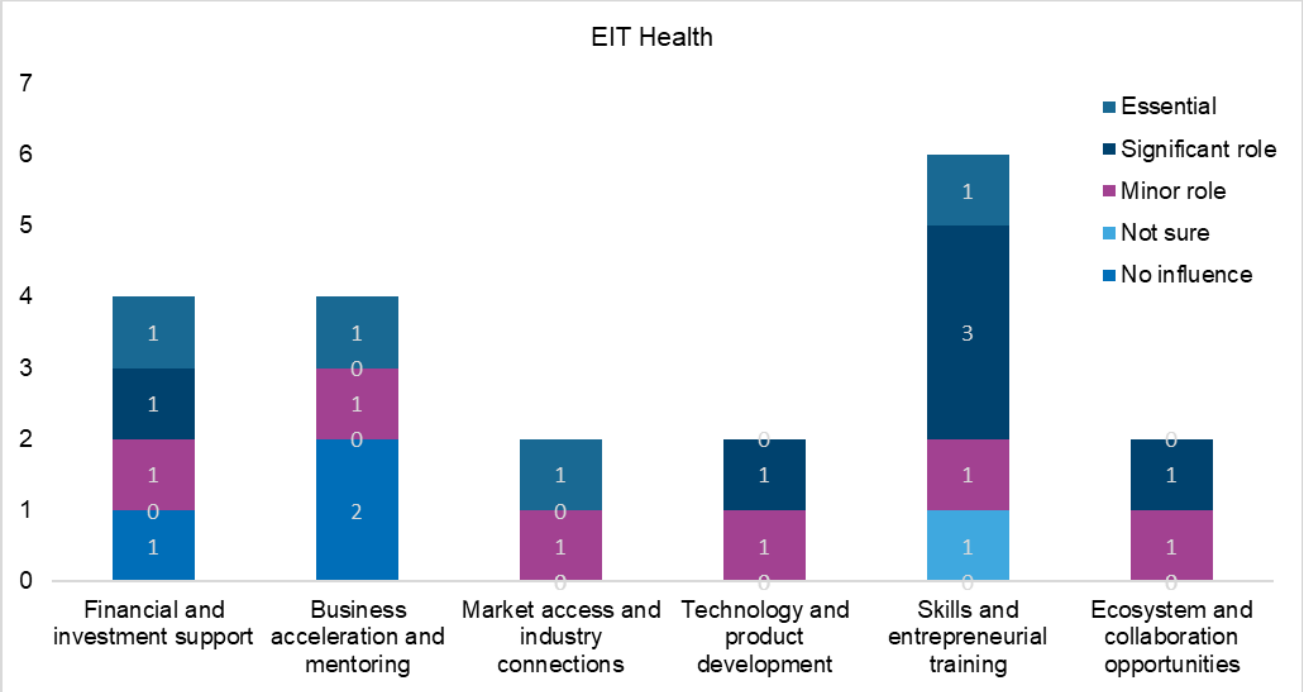
Source: Ecorys, based on the survey with ventures supported

Figure 81. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT InnoEnergy



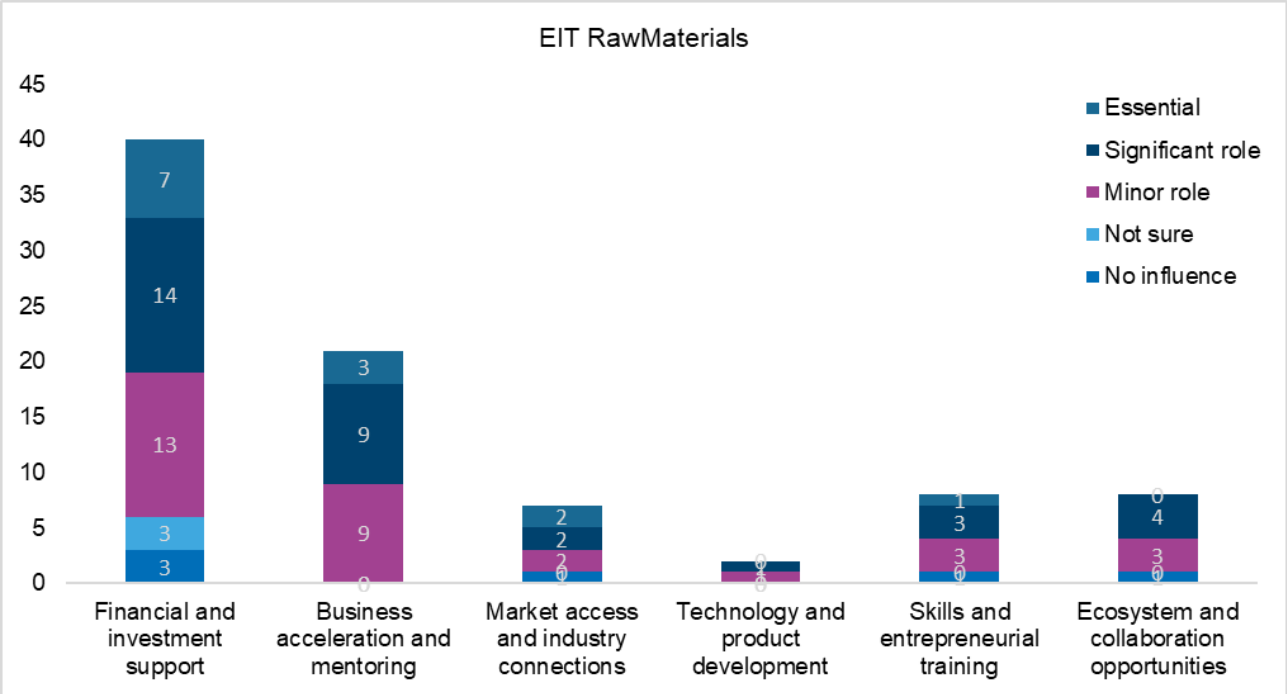
Source: Ecorys, based on the survey with ventures supported

Figure 82. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Health



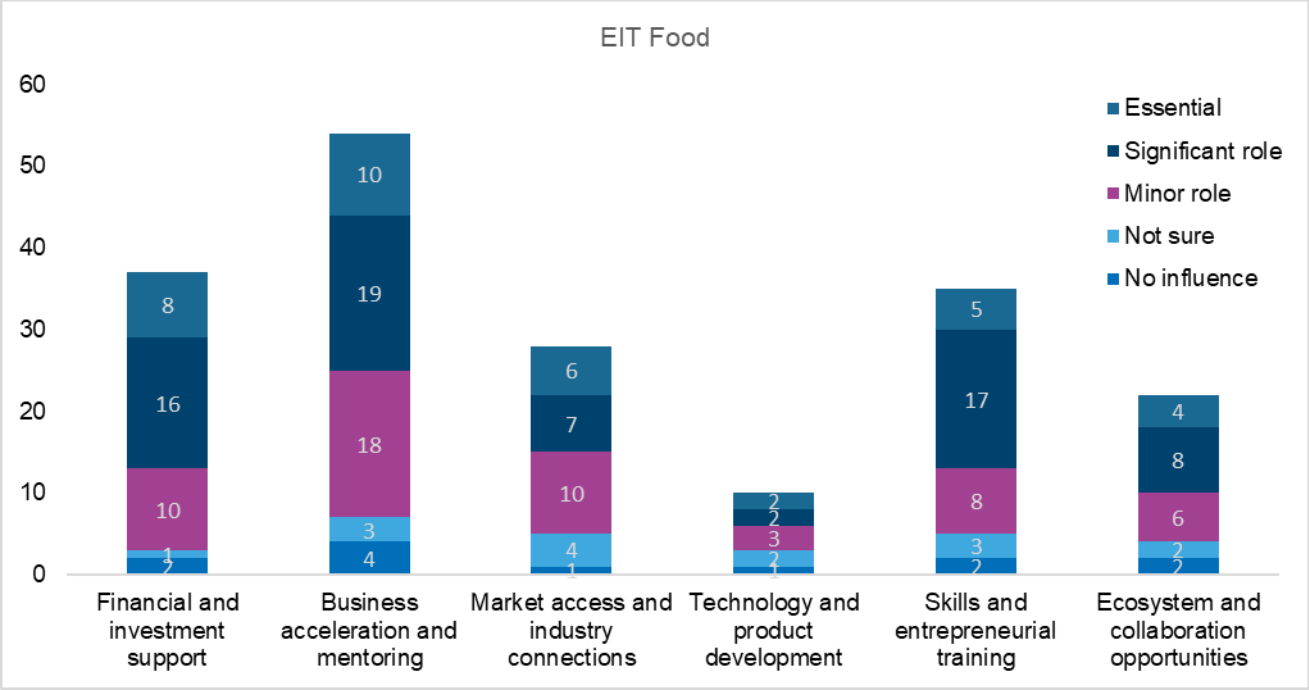
Source: Ecorys, based on the survey with ventures supported

Figure 83. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT RawMaterials



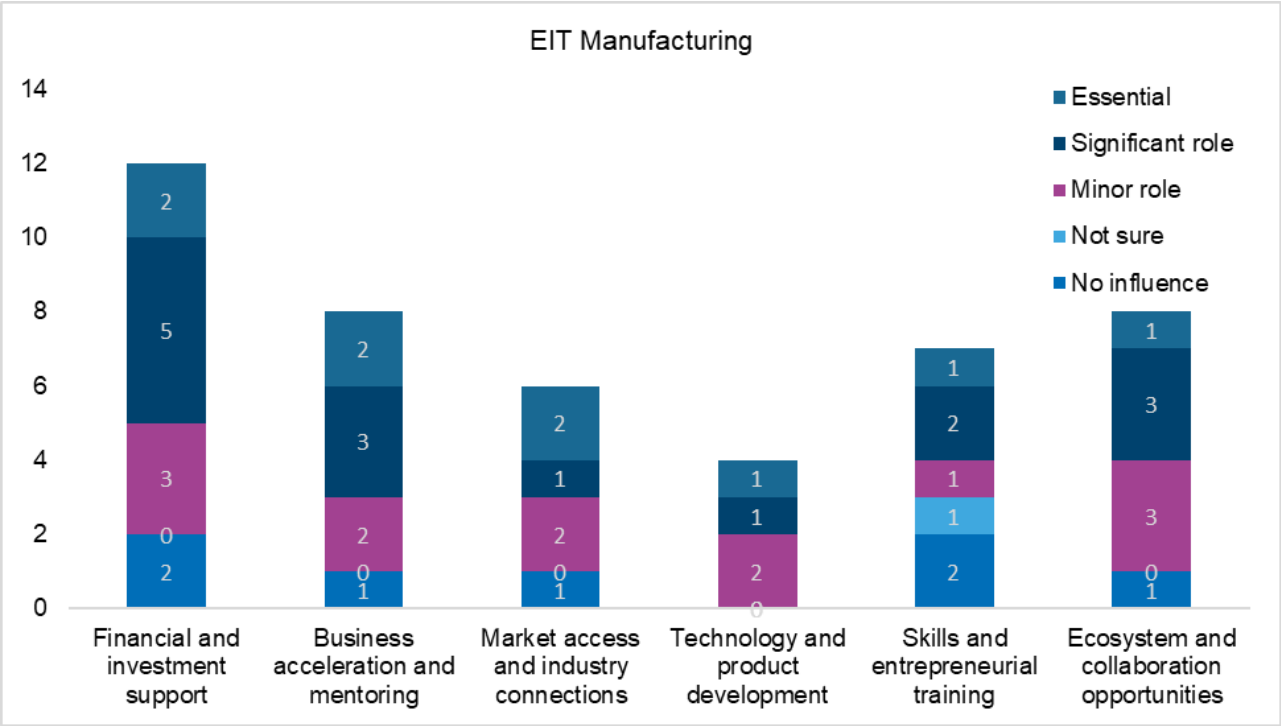
Source: Ecorys, based on the survey with ventures supported

Figure 84. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Food



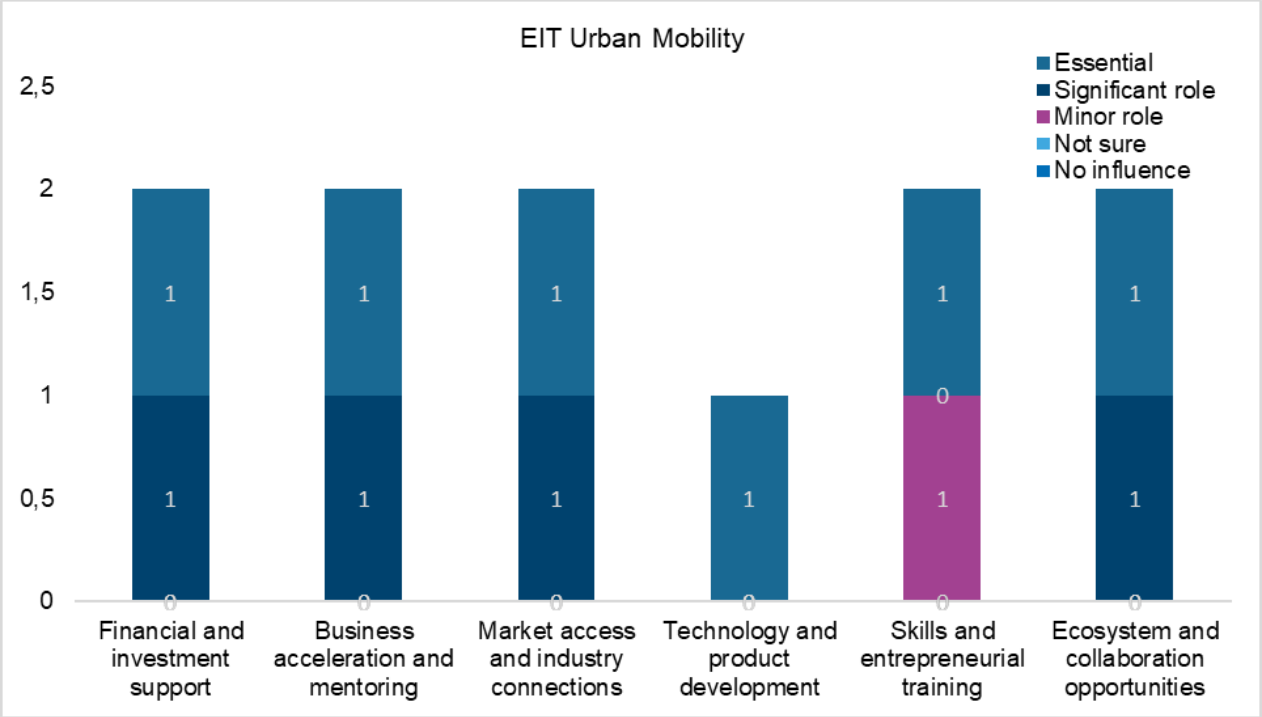
Source: Ecorys, based on the survey with ventures supported

Figure 85. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Manufacturing



Source: Ecorys, based on the survey with ventures supported (for 7-year assessment of EIT Manufacturing)

Figure 86. Share of answers for the survey question "To what extent do you believe that KIC support contributed to your company's economic achievements?" with respect to KIC and the type of support – EIT Urban Mobility



Source: Ecorys, based on the survey with ventures supported (for 7-year assessment of EIT Manufacturing)

Table 157. Ventures' responses to the question "Has employing individuals trained by the KICs helped to fill skill gaps within your organisation?"

KIC	Yes	No, they did not fill skill gaps	Not sure	Total responded
	%	%	%	#
EIT Climate-KIC	71%	14%	14%	7
EIT Digital	56%	33%	11%	9
EIT InnoEnergy	40%	20%	40%	5
EIT Health	50%	0%	50%	2
EIT RawMaterials	67%	33%	0%	6
EIT Food	67%	17%	17%	6
EIT Manufacturing	23%	43%	34%	35
EIT Urban Mobility	25%	61%	14%	57
Total	**34%**	**46%**	**20%**	**127**

Source: Ecorys, based on data from surveys among ventures supported by KICs

Table 158. Partners' responses to the question "Has employing individuals trained by the KICs helped to fill skill gaps within your organisation?"

KIC	Yes	No, they did not fill skill gaps	Not sure	Total responded

	%	%	%	#
EIT Climate-KIC	60%	20%	20%	5
EIT Digital	40%	20%	40%	5
EIT InnoEnergy	57%	14%	29%	7
EIT Health	67%	0%	33%	3
EIT RawMaterials	52%	30%	17%	23
EIT Food	67%	22%	11%	9
EIT Manufacturing	58%	17%	25%	65
EIT Urban Mobility	30%	32%	38%	50
Total	**49%**	**23%**	**28%**	**167**

Source: Ecorys, based on data from surveys among KICs' partners

Table 159. Graduates' responses to the question on the country of the University where they got the degree

Country of University	Number	Country of the university	Number
Sweden	62	Nigeria	4
Spain	49	Brazil	3
Italy	47	Czech Republic	3
France	46	Hungary	3
Germany	41	Australia	2
Belgium	33	Denmark	2
Portugal	23	England	2
Netherlands	21	Estonia	2
Finland	17	Greece	2
Poland	14	Mexico	2
UnitedKingdom	8	Ukraine	2
India	7	Lithuania	1
Austria	6	Mongolia	1
China	5	Pakistan	1
Ireland	5	Philippines	1
Switzerland	5	Slovakia	1
Colombia	4	Türkiye	1
Ghana	4		

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