

Horizon Europe 2028-2034 (FP10): The Moving Definition of Hard

Why Europe's next research and innovation programme needs a technology-clock view of science, AI delivery capability and budget allocation

Prepared by Patrick Halford - Gaoithe Advisory – June 2026
www.gaoitheadvisory.com

FP10 is the next EU Framework Programme for Research and Innovation.

In current European Commission language, it is the proposed Horizon Europe programme for 2028-2034: a large research and innovation programme intended to strengthen Europe's science base, competitiveness, innovation capacity and ability to respond to real-world challenges.

That is the official frame.

This note is about the pressure underneath that frame.

1. FP10 is being designed against a moving baseline

FP10 is being designed for a Europe whose scientific, industrial and organisational capabilities will change repeatedly before many funded projects even begin.

But Europe is not changing in isolation.

It is reacting to, depending on, competing with and being constrained by global technology and industrial players whose own capabilities are moving at speed.

AI infrastructure. Cloud platforms. Semiconductors. Critical raw materials. Advanced manufacturing. Defence systems. Energy technology. Life sciences. Digital platforms. Industrial automation.

Each of these areas now sits inside a moving global system of capability, capital, supply, dependency and control.

That matters because FP10 is not being built on a stable European baseline.

It is being built in the middle of multiple dependence loops.

Europe depends on external compute to build sovereign AI. It depends on external platforms to scale digital services. It depends on external chips to strengthen advanced industry. It depends on external raw materials to build clean technology. It depends on external industrial capacity to rebuild resilience. It depends on external technology roadmaps while trying to write its own.

This is not a criticism. It is the strategic reality. Europe is trying to build sovereignty while still relying on the systems, suppliers, platforms and capital structures that sovereignty is supposed to reduce dependence on.

That makes FP10 a different kind of programme challenge. It is not only a question of choosing the right research themes.

It is a question of designing funding, consortia, governance and exploitation models that can keep pace with a moving definition of difficulty.

2. The definition of hard is no longer fixed

Some activities that looked expensive, slow or coordination-heavy in 2025 will be materially cheaper, faster or easier by 2028. Some research questions will be narrowed by simulation before large public budgets are committed. Some partner searches will be compressed by AI-supported market, patent, publication and capability scanning. Some project risks will become visible earlier through better monitoring and live external intelligence. Some exploitation work will need to start before the grant agreement is signed, not three years later in the final work package.

At the same time, other bottlenecks will become harder.

Validation may become harder. Data access may become harder. Trust may become harder. Compute access may become harder. Regulation may become harder. Industrial adoption may become harder. Sovereign control may become harder. Delivery across fragmented European systems may become harder.

So the issue is not that everything becomes easier. The issue is that the bottlenecks move.

When the definition of hard moves, the budget should move with it. FP10 cannot afford to fund yesterday's bottlenecks at tomorrow's scale. The central question is therefore not only:

What should Europe fund?

It is also:

Which assumptions about difficulty, dependency and delivery will expire before the money is deployed?

3. AI will change both the science and the project machinery

One of the biggest FP10 shifts may come from two AI capability curves moving together.

The first is the AI co-scientist.

By this, I mean AI systems that help researchers and industrial teams scan literature, generate hypotheses, design experiments, run simulations, interpret data and explore research directions faster than before.

The second is the AI project manager.

By this, I mean AI systems that help consortia map partners, design work packages, test budgets, track risks, monitor deliverables, support reporting, scan markets, plan exploitation and flag when project scope needs to change.

That combination matters. AI will not only change the science inside FP10 projects. It will also change the machinery around those projects. Science acceleration and project acceleration will start to reinforce each other.

A consortium may be able to generate stronger hypotheses earlier, test more options before committing budget, monitor delivery risks continuously, detect exploitation routes sooner, and adjust scope before a project drifts into expensive delay.

That changes the capacity of public funding.

A EUR10 million project in 2030 should not be expected to deliver the same amount of scientific, industrial or organisational output as a EUR10 million project designed around 2025 assumptions.

The nominal budget may be the same. The effective capacity should not be.

If AI co-scientists and AI project managers increase the useful discovery, coordination and delivery capacity available to a consortium, FP10 has to ask a harder budget question:

What should Europe expect from each euro of public funding when the project team is no longer limited to human-only research, coordination and governance capacity?

This is not a case for cutting ambition. It is a case for raising the expected output from funded work.

More hypotheses tested. More options simulated. More partners scanned. More delivery risks spotted early. More exploitation paths tested. More spinout signals detected. More evidence generated before large sums are locked in.

That is the new funding physics.

FP10 should not only ask how much money is available. It should ask what that money can now do.

4. The old proposal machine is exposed

There is another uncomfortable point. FP10 may also change the machinery around European funding itself.

For years, complexity has supported a large industry around call interpretation, partner search, proposal production, work-package design, budget construction, project management, reporting and compliance. That industry exists because the system is hard to navigate.

But complexity is exactly the kind of friction that AI and agentic systems are built to compress. By the time FP10 is fully operating, the development and allocation of funds may need to become far more dynamic. Calls may not remain fixed documents that sit still while the world moves around them.

They may become living funding frames, continuously tuned against a global clock of what is technically hard, strategically urgent, industrially constrained and scientifically possible.

Consortia may start to self-assemble around live capability maps, not static partner-search rituals.

Evaluation may become partly automated, with agents testing proposals against policy priorities, technology baselines, delivery credibility, partner capability, duplication risk, exploitation pathways and dependency exposure.

Funding allocation may become more adaptive, shifting as evidence changes.

Project governance may become more continuous, with automated monitoring of delivery risk, scope drift, emerging competitors, new scientific results, industrial uptake, regulatory change and spinout potential.

Mid-project scope changes may become normal rather than exceptional.

Spinouts may be detected, shaped and supported while the project is still running, not treated as a late exploitation afterthought.

This does not remove the need for human judgement. It makes judgement more important. But it weakens the old business model built around navigating administrative fog.

If agents can read the call, scan the field, map partners, generate proposal structures, test budgets, monitor delivery and flag exploitation routes, then the value shifts.

The value is no longer in producing applications. The value is in deciding what should exist.

Which problem deserves money? Which bottleneck has moved? Which consortium is real? Which capability is missing? Which dependency is dangerous? Which project should be stopped, merged, redirected or spun out?

FP10 should not simply digitise the old proposal machine. It should ask whether parts of that machine are still needed.

5. Failed applications may not stay failed

In the current system, most applications do not get funded.

That creates a familiar pattern: large amounts of intellectual effort are spent building consortia, writing proposals and shaping project ideas that never receive public money.

Some of those ideas die. Some wait for the next call. Some are recycled. Some disappear into the filing system.

But by the time FP10 is operating, that pattern may also change. If AI reduces the cost of research design, partner search, market mapping, technical validation, exploitation planning and early project coordination, more unfunded consortia may be able to continue without waiting for Brussels.

They may self-fund a smaller version. They may run a pilot before the call result. They may use national, regional or private money. They may build a commercial demonstrator. They may form a spinout. They may redirect toward customers. They may come back to FP10 later with evidence, not just intent.

That changes the role of European funding.

FP10 will not only be choosing between static applications. It may be choosing between live opportunity systems, some of which are already moving.

That puts pressure on the old evaluation model. If an unfunded consortium can keep advancing, validating and attracting capital after rejection, then the funding system needs a way to keep watching the field.

Not everything valuable will sit still after the deadline. Not every rejected proposal will remain a failed proposal. Some will become companies. Some will become regional initiatives. Some will become industrial partnerships. Some will become future strategic assets. Some will prove that the original call logic was too slow.

The old model treats evaluation as a gate. The new model may need to treat evaluation as an ongoing signal.

6. What this means for FP10 positioning

Industrials, research institutions, investors, clusters and European funding bodies should not wait for the call text.

By the time the call text appears, the best consortium should already exist.

The stronger move is to scan now for where European priorities, global dependence loops and AI-enabled capability shifts are already converging.

That means asking harder questions before the formal funding machinery starts.

Where is Europe exposed?

Where is the bottleneck moving?

Which assumed difficulty is already collapsing?

Which new difficulty is emerging?

Which partners should already be in the room?

Which project architecture will still make sense in 2030?

Which parts of the old proposal and governance model are becoming dead weight?

Which funding areas will need dynamic adjustment rather than fixed call logic?

This is not grant writing. It is strategic positioning before the grant-writing race begins.

For investors, the same shift creates a different opportunity. If FP10-relevant consortia, spinouts and industrial projects start forming before calls are visible, then the investment signal also moves earlier.

The opportunity is not only to back funded projects after public money arrives.

It is to spot unfunded or pre-funded teams, technologies and industrial coalitions that are already moving around a real European bottleneck. In that world, FP10 becomes part of the investment landscape, not a separate public-funding lane.

7. The FP10 Technology Clock Scan

The FP10 Technology Clock Scan is a practical outside-in method for identifying where future FP10 opportunities, pressure points and consortium architectures are forming before they become obvious. It scans a domain through five lenses:

European priority: What Europe is clearly trying to strengthen, protect or reduce dependence on.

Global movement: Which non-European technology, industrial, capital or supply-chain players are changing the baseline.

Capability shift: Where AI, automation, simulation, agents or scientific tools are changing what is possible.

Moving bottleneck: What is becoming easier, what is becoming harder, and where funding should follow the new constraint.

Consortium opportunity: Which universities, RTOs, companies, SMEs, clusters or regions could form a credible project architecture before the call is visible.

The output is not a generic report. It is a positioning tool. It shows where FP10-relevant opportunities are forming, which assumptions are expiring, which partners matter, and what should be done in the next 90 days.

8. The point

Horizon Europe 2028-2034 is not being designed for a stable world.

It is being designed for a Europe trying to build sovereignty while still operating inside global dependence loops. It is being designed during a period when AI is changing the cost, speed and coordination logic of science, industry, project delivery and governance.

That changes the role of funding. The old question was:

Can we win the call?

The better question is:

Should this call, consortium and budget logic still exist by the time the money moves?

That is the moving definition of hard. And it is where FP10's real strategic challenge begins.