

Swedish companies' view on participation in Horizon 2020

Preface

Global investments in R&D have doubled over the last ten years. The landscape is rapidly changing with a pivotal shift towards Asia. This will have an impact on European competitiveness and, in the long run, on future growth and jobs.

The EU framework programme for research and innovation is one important answer to the challenge and must be at the core of the EU policy for future growth. With a ninth programme under way, it is important to draw on the experiences from the current programme, which is now nearing its end.

In this report, the view of Swedish companies on Horizon 2020 is presented. The investigation shows both the positive impact and importance of the EU research programmes, but also challenges and deterrents that should be addressed in the upcoming programme FP9.

Faugert & Co Utvärdering was commissioned by the Confederation of Swedish Enterprise to conduct this study.

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1 Introduction

Main findings of study

- The study is based on a survey of the 50 most active Swedish companies in Horizon 2020 (based on number of granted projects), which yielded 31 responses.
- H2020 provides companies with an arena where they can collaborate with other companies and internationally leading universities and research institutes in highly strategic projects.
- The companies have a very positive view of Horizon 2020 in general and believe that it plays an important role in stimulating investments in R&D and innovation, and contributes to strengthening their competitiveness.
- Companies' Horizon 2020 participation is limited by internal resources. Some companies could participate more if relevant calls were easier to identify and the rules for participation were made simpler.
- Despite the European Commission's efforts to reduce administration in Horizon 2020 compared to previous Framework Programmes, many companies still view burdensome project administration as a strong deterrent.
- Companies believe that the national support system could be improved in terms of better meeting industry needs and by increasing support to actors in the proposal phase.

The Framework Programmes for Research and Technological Development (FPs) created by the European Union/European Commission have been ongoing since 1994. The current iteration, Horizon 2020 (henceforth H2020) is the 8th programme period. With nearly €80 billion of funding available over seven years (2014–2020), H2020 is the world's largest public investment in research and innovation. Actors from all EU Member States and (at present) 16 associated countries may submit proposals for projects in response to calls for proposals in sub-programmes covering a wide range of topics and themes. In contrast to previous programme periods that mainly focused on technological research, H2020 is more oriented towards innovation, economic growth and solving societal challenges. As H2020 nears its end, the 9th programme period (FP9) is under negotiation.

1.1 About the study

The Confederation of Swedish Enterprise (SN) commissioned Faugert & Co Utvärdering to conduct a study to produce knowledge on how Swedish companies view participation in the FPs in general and H2020 in particular, in order to inform SN's policy development. The study is based on a survey of the 50 most active Swedish companies in H2020. The study, which was carried out between December 2017 and February 2018 by Anders Håkansson and Tomas Åström, set out to answer the following questions:

- Why do companies participate in H2020?
- How important is participation in H2020?

- What added value does H2020 offer in comparison with national publicly co-funded R&D programmes and self-funded internal R&D?
- What are the results and impact of companies' participation in the FPs?
- What barriers, deterrents and challenges do companies experience as regards participation in H2020?
- What could motivate companies to participate more in H2020?
- How do companies gather information on H2020 funding opportunities and participation rules?
- How effective is the Swedish H2020 support system?
- What changes in focus and participation rules do companies propose for the next FP?

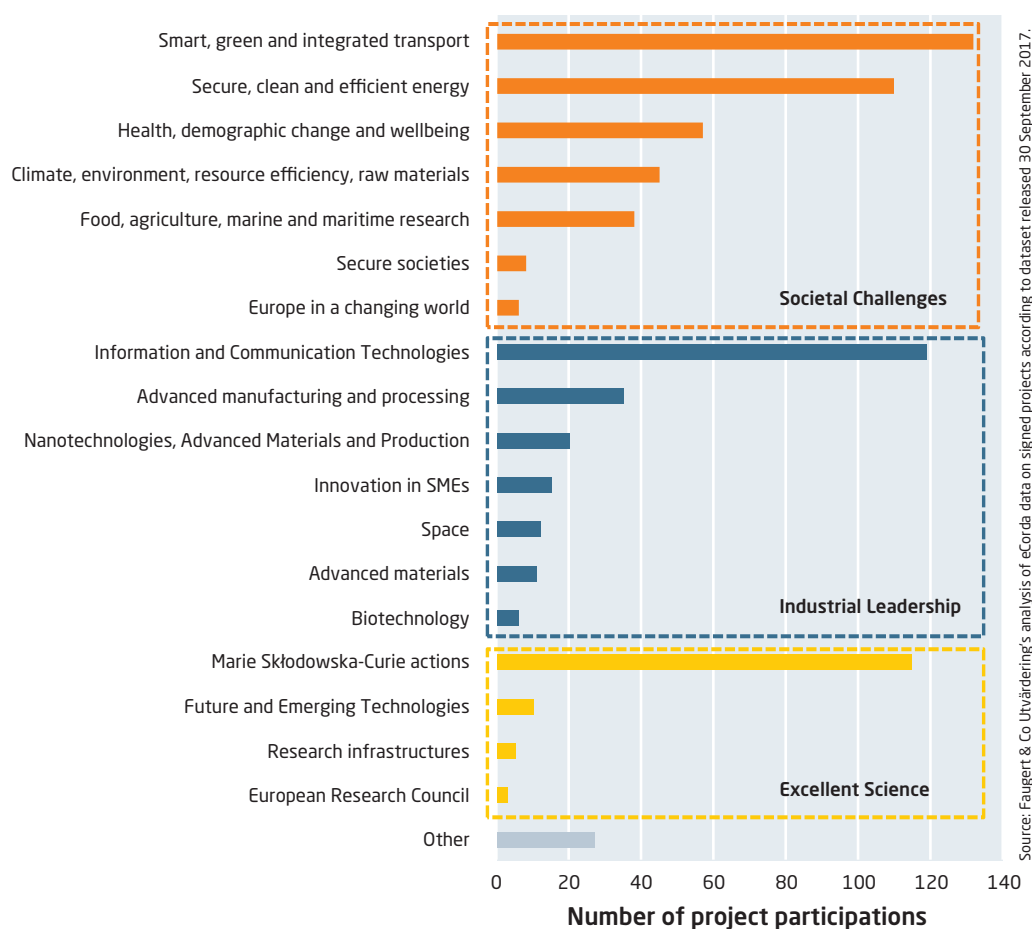
The companies included in the survey were identified through participation data in signed H2020 projects from the eCorda database. The dataset was released by the European Commission on 30 September 2017 and made available by Vinnova on 10 October 2017. At the time there were 36 companies with more than two project participations in H2020 and an additional 77 companies with two project participations. The latter were differentiated by the amount of EC funding granted. We were unable to identify a relevant contact person for 4 of the top 50 participating companies and 4 companies were represented by the same individual, for which reason replacement companies were added from the list of companies with two project participations so as to end up with a gross list of 50 companies. We directed the survey to top management (R&D manager, CTO or equivalent) and the list of individuals and their e-mail addresses was collated with the help of SN complemented with Googling.

The 50 survey invitations resulted in 31 responses, which corresponds to a response rate of 62 percent. Among SMEs the response rate was only just over 50 percent whilst it was close to 70 percent among non-SMEs. The survey was conducted between 18 December 2017 and 26 January 2018. Non-responders were reminded on three occasions.

1.2 Swedish companies' participation in H2020 in brief

Overall, Sweden is among the ten most successful countries in H2020 in terms of EC funding granted to Swedish organisations, and the Swedish private sector is also faring well in H2020. It is the sector that has the highest project participation rate in both the Industrial Leadership and the Societal Challenges pillars. The private sector had by 2016 secured one-quarter of all funding granted to Swedish actors and was responsible for 30 percent of all Swedish project participations.¹ Swedish companies' participation in H2020's pillars and sub-programmes are illustrated in Figure 1. Companies naturally participate the most in the Societal Challenges and Industrial Leadership pillars that are most obviously industry relevant, and three sub-programmes gather a substantial share of all company participations, namely "Transport", "Energy" and "ICT". Except for the Marie Skłodowska-Curie actions, few companies participate in the Excellent Science pillar.

¹ K. Danerlöv och J. Wefer, "Årsbok 2016 – Svenskt deltagande i europeiska program för forskning och innovation", Vinnova Analys VA 2017:03.

Figure 1. Breakdown of company project participation per sub-programme and pillar.

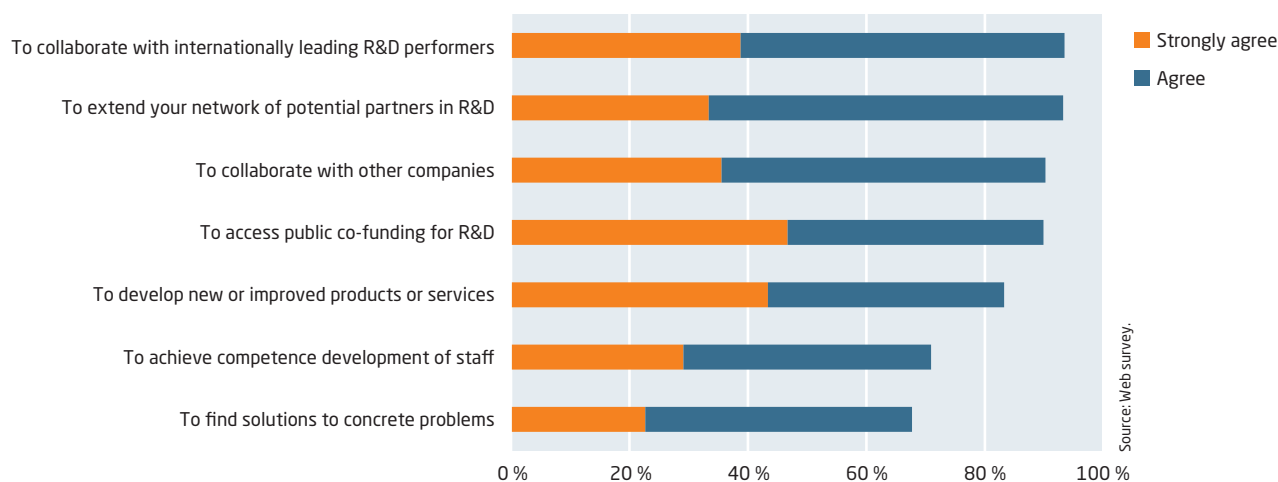
Our population of the 50 most active Swedish companies together account for 235 project participations, which correspond to roughly 30 percent of all Swedish project participations by the private sector. Consequently, participation is highly skewed with a small number of active project participants and a long tail of companies with one project participation.

2 Results

2.1 Importance of H2020 participation

What motivates companies to participate in H2020? Figure 2 reveals that collaboration with internationally leading R&D performers (universities and research institutes) is the highest rated motive.² H2020 also provides companies with opportunities to extend their network of potential partners for future R&D collaborations, this was the second highest ranked motive. Nine of ten companies are motivated to participate in H2020 because it provides an arena where they can collaborate with other companies, and give access to public co-funding for R&D. Slightly lower rated overall are opportunities to develop new or improved products and services. However, on this issue respondents representing large companies and SMEs disagree. Product and service development is among the highest rated alternatives for SMEs, and the second lowest rated for large companies. We know from previous studies that large companies and SMEs tend to participate in publicly co-funded R&D projects for different reasons. Large companies generally have long-term objectives like general competence development and recruitment of trained researchers, whereas most SMEs, often with little R&D experience and limited internal R&D resources, tend to participate in projects to solve short-term problems that lie close to their core product or service. However, these two sub-groups are very small, and analyses of small groups are inherently unreliable, but in this case the findings seem to confirm findings of previous studies.

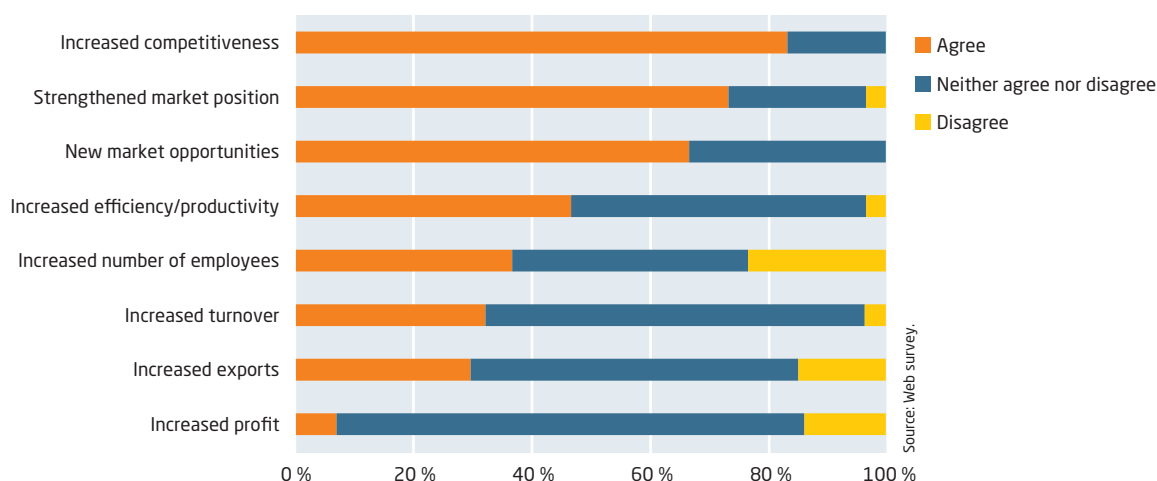
Figure 2. Companies' rationale for participating in H2020.



² Questions were posed as statements for respondents to rate on a Likert-type scale: "Strongly agree", "Agree", "Neither agree nor disagree", "Disagree", "Strongly disagree" or "Don't know".

Companies believe that their participation in H2020 and in previous FPs has had significant long-term impact, see Figure 3. A large share of companies perceive that their participation has increased their competitiveness, strengthened their market position and provided them with new market opportunities. Almost half of the companies agree that FP participation has contributed to increased efficiency or productivity, but this has rarely yielded increased profit; only 7 percent (equal to 2 responses) believe that this is the case. Approximately 30 percent of the companies agree that FP participation has contributed to growing the company in terms of turnover, number of employees or exports.

Figure 3. Perceived impact of participation in H2020 and previous FPs.

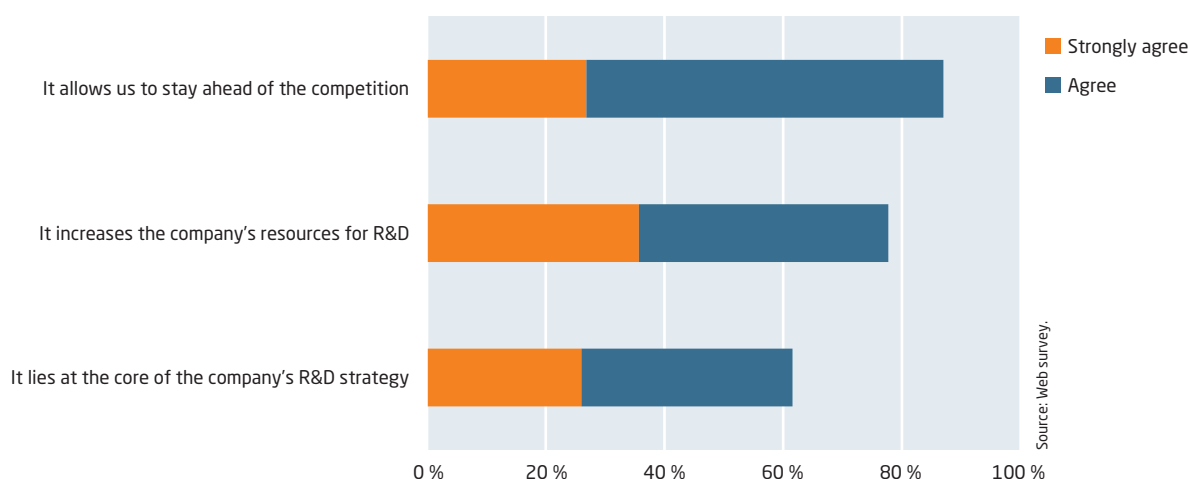


Why is participation in H2020 important for companies? To what problem is H2020 a solution? Part of the answer is given in Figure 4. More than 80 percent of the companies believe that H2020 participation enables them to stay ahead of the competition. This is also in line with the results in Figure 2, which illustrated that FP participation contributes to making companies more competitive, enables them to enter into new markets and strengthens their position in existing ones.

We already now know that one of companies' main rationales for participation is gaining access to additional funding for R&D, so it is not surprising that many agree that one of H2020's most important offers to companies, and in particular SMEs, is that it provides additional resources for R&D.

Slightly lower rated is the statement that H2020 participation is important to fulfil the company's overall R&D strategy. We have received some comments from larger companies, which also coincide with what they have expressed in other studies, that publicly co-funded multi-partner projects are not so suitable for product development and commercialisation, but rather for technology development and transfer. This result seems to partly contradict sentiments expressed by large companies that they are becoming ever less likely to participate in publicly co-funded R&D projects that do not fit with their R&D strategies.³

³ T. Åström, A. Håkansson, M. Bergman, E. M. Johansson, M. Terrell and R. Danell, "Harder, lighter and faster – Impact assessment of a selection of Vinnova's materials-related programmes", Vinnova Analys VA 2017:02.

Figure 4. Companies' view on why participation in H2020 is important.

We asked companies to describe in free text what added values H2020 projects offer. The most frequent response is that H2020 provides an arena for international collaboration between suppliers, customers, competitors and leading European R&D partners, or an opportunity to find partners with cutting-edge knowledge and competence on specific topics. H2020 projects are also widely appreciated for allowing an extended scope and involvement of a wider range of stakeholders than national R&D projects. Active participation in European networks and projects also provides companies with a larger and more diverse recruitment base.

Some of the large companies suggest that H2020 participation provides several strategic advantages. H2020 projects can provide opportunities for knowledge sharing between industry actors, strategic intelligence on topics of common interest and new trends. Large H2020 initiatives can have a huge impact in terms of determining pathways of industry-specific technology development, standardisation and specialisation of R&D partners. Therefore, it can be crucial for companies to participate in these projects or initiatives in order to influence future developments in industry.

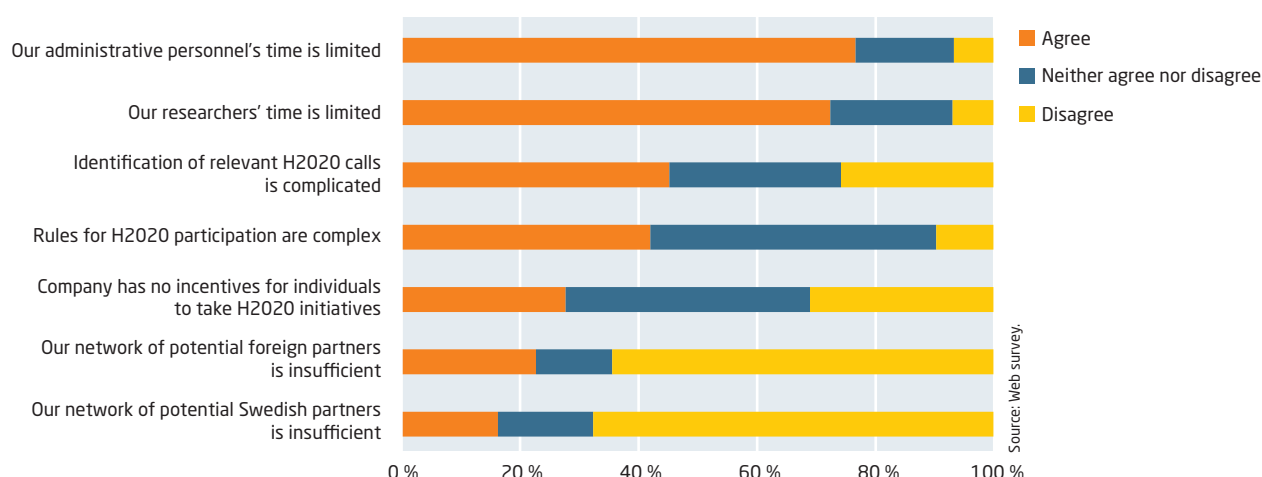
2.2 Barriers and deterrents to participation in H2020

We queried companies about both barriers and deterrents to H2020 participation. Barriers are more fundamental and mostly structural, whereas deterrents are subtle and generally pertain to individual preferences and perceptions. However, we acknowledge that there is a degree of overlap between the two categories.

If we first turn to perceived barriers, see Figure 5, we see that companies experience limited administrative and research capacity as the most prominent barriers (77 % and 72% agree, respectively). This may imply that companies are restricted in their capacity to participate in proposals (and projects) for a number of reasons. A company may find it difficult to assign sufficient resources already in the proposal stage, both R&D and administrative personnel, particularly if it wants to have a large role in the consortium. Most universities and some research institutes have specialised personnel to assist with administrative tasks connected with proposal production and on-going project administration. Since most companies lack such specialised administrators,

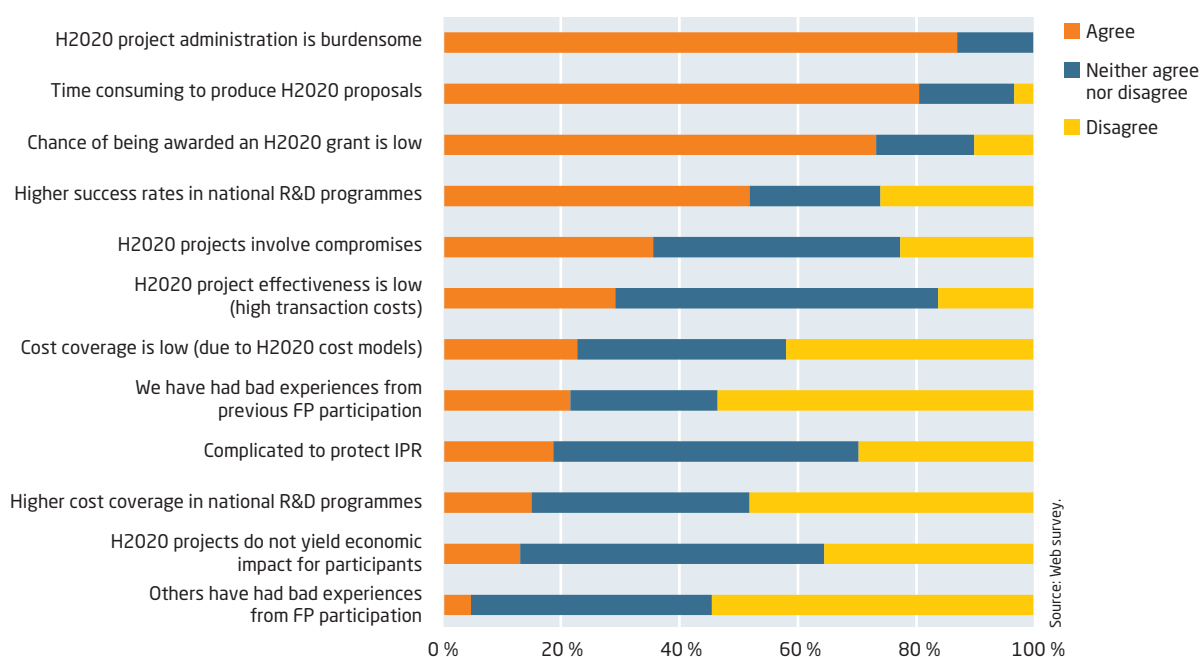
the administrative burden to participation in H2020 proposals and projects may be a particularly notable barrier. Companies are obliged to co-fund their participation in projects in cash or – more commonly – in kind, generally by personnel allocating time to the project, and this is also clearly a limiting factor. Some 40 percent of companies find that the rules for H2020 participation are complex and that it is complicated to identify relevant calls for proposals, and this can also pose a bottleneck both in terms of lack of knowledge and in requiring more personnel resources. From the free-text responses, we learn that some companies solve this issue by trusting their partners in universities and research institutes to take on larger responsibilities in producing proposals and handling project administration.

Figure 5. Barriers to companies submitting or contributing to an H2020 proposal.



When it comes to companies offering incentives for individuals to take initiatives to participate in H2020, roughly 30 percent of respondents agree that their company lacks such incentives, whereas another 30 percent disagree. Here we notice another difference between large companies and SMEs, where the latter state that they to a greater extent do incentivise individuals. Most companies believe that they are well connected both internationally and nationally, and few see the extent of their networks as barriers to participation.

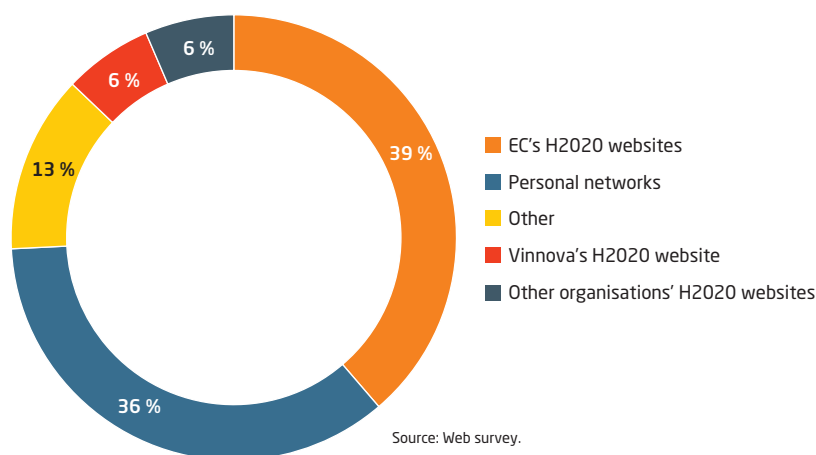
As illustrated in Figure 6, the most prominent deterrent is the perception that it is time-consuming to produce proposals, with over 80 percent of respondents agreeing (of which 45% strongly agree). The second highest rated deterrent is that H2020 project administration is burdensome. H2020 was conceived with the ambition of reducing administration, and it is difficult to determine if the perception of an overly bureaucratic administration reflects the situation in H2020 or experiences from previous FPs. Many H2020 sub-programmes are also infamous for their fierce competition and subsequently low success rates. This issue is the third highest rated deterrent with 74 percent of respondents agreeing, and correspondingly some 52 percent agree that higher success rates in national R&D programmes discourages H2020 participation. Combined with the view that proposal production is time-consuming, it is easy to understand why companies find it rational to abstain from some H2020 opportunities.

Figure 6. Deterrents to companies submitting or contributing to a H2020 proposal.

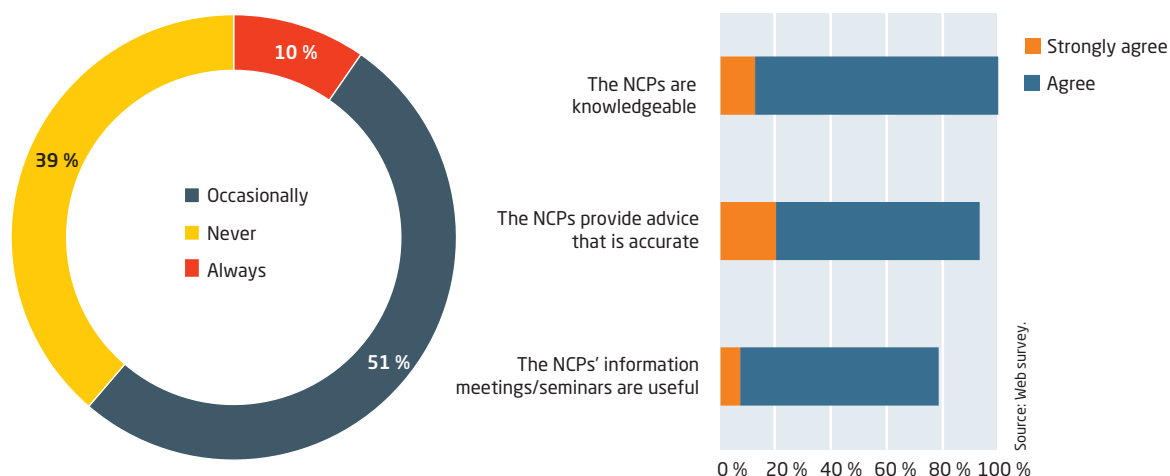
Roughly a third of companies believe that H2020 projects are characterised by low effectiveness compared to the alternatives and that they involve discouraging compromises. Less than one in five companies experience that it is complicated to protect intellectual property rights (IPR) or that projects do not yield economic impact for the company. There are several suggested deterrents where respondents disagree significantly. It is generally agreed upon that companies are offered sufficient cost coverage in H2020, and most companies do not perceive this as a deterrent. Neither do they experience that cost coverage is better in national R&D programmes. Finally, the survey results clearly show that companies are not deterred by previous bad experiences, either rumoured nor self-experienced.

2.3 Information and support to participation in H2020

The two main sources for information regarding H2020 funding opportunities and developments are the EC's H2020 websites and respondents' personal networks, as shown in Figure 7. However, if we only look at responses from large companies, personal networks are clearly the primary source of information. Few respondents use Vinnova's website for information, although Vinnova is tasked with the national EU Coordination Function and employs most of Sweden's National Contact Points (NCPs).

Figure 7. Preferred channel for sourcing information about developments in H2020.

The network of NCPs is the main structure to provide guidance, practical information and assistance on all aspects of H2020 participation. The task of the NCPs is to provide support to individuals and organisations that wish to participate in H2020, both individually and collectively in various types of information meetings. We asked how often companies consult NCPs when they appraise calls or participate in development of proposals and the result is shown in Figure 8. Only one in ten companies interact with NCPs regularly and four out of ten never use NCPs. Every other company occasionally seeks advice from NCPs. It is important to remember that the surveyed companies are the most experienced company participants and thus perhaps not the primary target audience for the NCPs. Companies that state that they have interacted with NCPs were further asked to express their satisfaction with the NCPs' services, and respondents almost unanimously agree that NCPs are knowledgeable and provide accurate advice.

Figure 8. How often companies consult NCPs when appraising H2020 opportunities or preparing proposals for H2020 (left). Degree of satisfaction with NCPs (right).

We asked companies to elaborate in free-text format on how national advisory services and financial support systems could be improved to encourage increased participation. According to several respondents, Swedish authorities could better advocate industry needs, could directly involve industry actors when influencing instruments and calls, and could assist companies in identifying upcoming calls. Multiple comments stress that companies are dependent on close collaboration with universities and research institutes, which take the main burden of identifying calls, building consortia and producing proposals, and ask for increased direct financial support (or indirect by supporting R&D performers) in the proposal phase.

Several comments were made asking for increased alignment of national funding and FP funding priorities. This could be achieved by further adaptation of national R&D programmes to H2020 policy priorities, in order to make publicly co-funded R&D projects even more geared towards future H2020 participation.

A suggestion put forth by an influential multinational company is that Swedish funding agencies could increase their funding of side participation in individual H2020 projects. Budget restrictions sometimes forces companies to exclude Swedish partners that could have benefited from participation in the H2020 project. National funding of side participation (i.e. through Vinnova or other national funding agencies) would enable additional parallel participation of Swedish organisations in highly strategic or important projects, and thus contribute to more Swedish organisations benefitting from the project.

We also received a few comments on what changes companies advocate in the process of planning FP9. Regarding rules and funding conditions the most frequent comment made was a request for further simplification and streamlining of H2020 project administration, which includes harmonising funding conditions, funding rates and reporting requirement between the EU and national funding agencies. In terms of content, some respondents wish that Sweden's collective input to the negotiations on FP9 is based in the national R&D efforts currently in effect, that the FP9 maintains the same funding level as H2020 and that activities for tackling global challenges and the Agenda 2030 goals are supported.

3 Discussion and conclusions

H2020 is the world's largest single public investment in R&D with close to €80bn in total public funding over a seven-year period. Sweden performs rather well overall, although there are troubling signs in terms of fewer proposals and lower success rates in H2020 than in FP7 relative six comparable countries, including our closest Nordic neighbours.^{4,5} The Swedish private sector is widely represented in H2020, but the bulk of participation is concentrated to a few very active and knowledge-intensive companies.

It deserves to be mentioned once again that this study has not investigated the views on H2020 in the private sector in general but rather among a positive selection of companies, which certainly introduces a significant bias in the results. This group of companies nevertheless represents many of the largest employers of R&D personnel in Sweden. Just Ericsson, Saab, Volvo Cars and AB Volvo (all respondents of this survey) employed approximately 22 000 persons in R&D in Sweden in 2015.⁶ These companies, together with several other large knowledge-intensive companies, are responsible for a large share of private investments in R&D, and are simultaneously major beneficiaries or co-funders of Swedish public R&D programmes, thus influencing the research agendas of Sweden's universities, university colleges and research institutes. Hence, it is safe to say that they represent a most important group of stakeholders in the Swedish R&D and innovation system.

The overall conclusion of this study is that these influential companies have a very positive view of H2020 in general and believe that it plays an important role in stimulating investments in R&D and innovation, and contributes to strengthening their competitiveness. H2020 provides large companies with an arena for international cooperation along the value chain and with leading R&D partners, and they consider participation to be of high strategic importance. At the same time, H2020 gives smaller companies opportunities to expand by stimulating investments in R&D and innovation, establishing or expanding international networks of partners and potential clients. These are just a few examples of the benefits that H2020 brings to participants from the private sector.

The study also shows that companies' H2020 participation is limited by the internal resources, mainly R&D and administrative personnel. There is also evidence to suggest that some companies could participate more if relevant calls were easier to identify and the rules for participation were simpler. In addition, many companies are deterred from H2020 participation because of a demanding proposal process (in combination with low success rates). Despite the EC's efforts to reduce administration in H2020 compared to previous FPs, many companies still view burdensome project administration as a strong deterrent. We explored these issues in more detail

⁴ T. Åström, N. Brown, B. Mahieu, A. Håkansson, P. Varnai and E. Arnold, "Norwegian participation in Horizon 2020 in health, ICT and industry. A study on the potential for increased participation", Research Council of Norway, 2017.

⁵ K. A. Piirainen (ed.), K. Halme, T. Åström, N. Brown, M. Wain, K. Nielsen, X. Potau, H. Lamminkoski, V. Salminen, J. Huovari, H. Lahtinen, H. Koskela, E. Arnold, P. Boekholt and H. Urth, "How can the EU Framework Programme for Research and Innovation increase the economic and societal impact of RDI funding in Finland?", Publications of the Government's analysis, assessment and research activities 8/2018, Prime Minister's Office, Helsinki, Finland, 2018.

⁶ <https://www.nyteknik.se/innovation/4-av-10-fou-anstallda-utvecklar-programvara-6578226>

in a recently published study on the potential for increased H2020 participation in Norway. In short, we can conclude that the results are well in line with what we found in the Norwegian study. Despite Norway's generous (from a Swedish perspective) financial and advisory support measures, companies seem to have the same views on barriers and deterrents to H2020 participation.⁷

Companies monitor H2020 developments primarily through the EC's website and their personal networks. The NCP's are only occasionally used by the responding companies, which is not surprising given that they are a positive selection of frequent participants that clearly have more in-house H2020 knowledge than the average company. However, companies believe that the national support system can be improved in terms of better understanding industry needs and actively influencing H2020 instruments and calls accordingly. The system could also increase its support to companies and their partners in research institutes and universities (which in practice take on much of the responsibility for building consortia and producing proposals in multi-partner projects) in the proposal phase. This could be achieved either by providing more financial support (as a means of risk reduction) or by more hands-on assistance with producing competitive proposals. Several companies also call for more alignment of Swedish R&D programmes with H2020 and future FPs.

This study represents the views of a rather small group of very H2020-active companies (which collectively account for 30% of all project participations by the Swedish private sector), but there are nearly 500 additional companies with H2020 project participation experience that have not been queried. They probably share many of the views on benefits and barriers expressed in this study, but they surely have other valuable experiences that could be worth exploring in order to get a better understanding of the needs of the private sector in anticipation of FP9. However, to systematically explore these companies' views would require access to e-mail addresses to the individuals in the companies responsible for the R&D and innovation activities, and this is information that Vinnova has been unable to assist us with.

⁷ T. Åström, N. Brown, B. Mahieu, A. Håkansson, P. Varnai and E. Arnold, "Norwegian participation in Horizon 2020 in health, ICT and industry. A study on the potential for increased participation", Research Council of Norway, 2017.

Appendix A Survey

Survey to participants in H2020

The Confederation of Swedish Enterprise (Svenskt näringsliv (SN)) has commissioned Faugert & Co Utvärdering to conduct a study on how Swedish companies view participation in the EU Framework programme for research and innovation – Horizon 2020 (henceforth H2020). The purpose of the study is to inform SN's policy development for the remainder of H2020 and to lay the foundation for policy priorities in the preparation of the next framework programme (FP9).

You receive this survey since your company is among the most active Swedish companies in H2020 so far, according to the participation database of the European Commission (EC).

Thank you for participating!

Your company's H2020 experiences

Q1: To what extent do the following statements reflect your company's rationale for participating in H2020?

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Don't know.

- To access new scientific or technical knowledge.
- To achieve competence development of staff.
- To collaborate with other companies.
- To collaborate with internationally leading R&D performers (i.e. universities, research institutes).
- To extend your network of potential partners in R&D.
- To find solutions to concrete problems.
- To access public co-funding for R&D.
- To develop new or improved products or services.

Q2: To what extent has participation in H2020 (and in previous FPs) contributed to the following impact for the company:

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Don't know.

- Increased competitiveness.
- Increased turnover.
- Increased efficiency/productivity.
- Increased profit.
- Increased number of employees.

- New market opportunities.
- Strengthened market position.
- Increased exports.

Q3: To what extent is H2020 participation important for the company?

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Don't know.

- It allows us to stay ahead of the competition.
- It lies at the core of the company's R&D strategy.
- It increases the company's resources for R&D.
- Other, please specify:

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Q4: From your perspective, what is the added value of participating in H2020 projects compared to projects co-funded by national funding bodies?

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Barriers and deterrents

Q5: To what extent do the following issues act as barriers to your company submitting (or contributing to) H2020 proposals?

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Not applicable.

- Identification of relevant H2020 calls is complicated.
- Rules for H2020 participation are complex.
- Company has no incentives for individuals to take H2020 initiatives.
- Our researchers' time is limited.
- Our administrative personnel's time is limited.
- Our network of potential Swedish partners is insufficient.
- Our network of potential foreign partners is insufficient.
- Other, please specify:

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Q6: Which of the following issues act as deterrents to your company submitting (or contributing to) H2020 proposals?

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Not applicable.

- Time consuming to produce H2020 proposals.
- Chance of being awarded an H2020 grant is low (low success rate).
- Cost coverage is low (due to H2020 cost models).
- Complicated to protect intellectual property rights (IPR).
- H2020 projects involve compromises.
- H2020 projects do not yield economic impact for participants.
- H2020 project administration is burdensome.
- H2020 project effectiveness is low (high transaction costs).
- Our company has had bad experiences from previous FP proposals/projects.
- Others have had bad experiences from FP proposals/projects.
- Success rates in national R&D programmes are higher than in H2020.
- Cost coverage in national R&D programmes is higher than in H2020.
- Other, please specify:

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Information and support concerning H2020 participation

Q7: What is your company's primary source of information when it comes to funding opportunities in H2020?

- Vinnova's H2020 website.
- EC's H2020 websites.
- Other organisations' H2020 websites.
- Personal networks.
- Other, please specify:

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Q8: How often does your company seek advice from Swedish National Contact Points (NCPs) when you are appraising opportunities or preparing proposals to H2020?

- Always.
- Occasionally.
- Never.

(if yes) What is your degree of satisfaction with the NCPs:

Strongly disagree; Disagree; Neither agree nor disagree; Agree; Strongly agree; Don't know.

- The NCPs are knowledgeable.
- The NCPs provide advice that is accurate.
- The NCPs' information meetings/seminars are useful.

Q9: How could Swedish support measures, both advisory services and financial support, be improved to further encourage your company to submit (or contribute to) additional H2020 proposals?

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Q10: What changes (if any) would your organisation advocate in planning of the next FP?

- Changes in content:

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- Changes in rules or funding conditions:

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