ERA-LEARN GUIDE

On co-funded European Partnerships

An essential introduction
for newcomers

Strengthening the partnership community

02/02/2026

Information

Project acronym	ERA-LEARN
Project no.	Funded by the European Union under the Grant Agreement 101102316
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About the Guide

You have just stepped into the world of European Partnerships, and learning all the nuances takes time. This guide will help you get started and provide the basic knowledge you need to navigate co-funded partnerships. It complements other sources[1], but it is **not** an official European Commission (EC) document. Rather, it bridges formal guidance with the experiences of people working with partnerships day to day.

There are three types of European Partnerships – co-funded, co-programmed, and institutionalised, each operating in a unique way. This guide focuses on co-funded partnerships and does not equally apply to other partnership types. There will be 60 partnerships under Horizon Europe 2021-2027, 22 of them are co-funded.

The guide covers common issues such as budgeting, conflicts of interest, implementing joint calls for proposals, monitoring projects, implementing additional activities, and demonstrating impact. To enhance understanding, it provides real-world examples of these challenges and effective solutions, helping stakeholders apply best practices in their context.

How to use this guide?

Skim through for the big picture or **jump to the chapter** that matches your interests.

Use guidelines and templates provided in the 'Further information' section based on your needs.

Learn form good practices and share your own experiences and insights.

We, the ERA-LEARN team, hope this document serves as a useful guide to your journey, and we look forward to receiving any insights and feedback you may have.

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[1] Such as: European Commission (2025). 'Horizon Europe Programme Guide' Version 5.1. 15 September 2025.

About ERA-LEARN

ERA-LEARN is a support platform for the R&I partnership community, funded as a support action (CSA) by Horizon Europe. The current phase is a 4-year initiative (2023-2027) that follows up on several previous phases of ERA-LEARN since 2009.

ERA-LEARN operates a unique database of partnership initiatives, calls and funded projects. The ERA-LEARN portal provides guidance and practical information on partnerships, together with manuals, tools, reports and good practice examples on governance models and legal issues, the implementation of joint calls, and additional activities carried out by the partnerships.

The partnership landscape is highly dynamic, with frequent updates to EC guidelines and ongoing ERA-LEARN activities. It is therefore essential for stakeholders to regularly consult the ERA-LEARN portal, subscribe to newsletters, and participate in events to stay informed about the latest developments, thereby ensuring compliance and effectiveness.

There are many opportunities for partnerships to share their experiences, identify needs and raise questions. ERA-LEARN provides a range of **guidance, tools, and resources** to help the partnerships navigate the complex research and innovation (R&I) landscape.

Both newcomers and experienced R&I system actors can benefit from ERA-LEARN's support in several ways:

- **Subscribe** to the ERA-LEARN newsletter and **follow us** on LinkedIn to stay informed about news and updates.

- **Access** a comprehensive database of European Partnerships with useful information and data.

- **Explore** the ERA-LEARN website for **guidance, good practices, reports, briefs** and other material on a wide range of relevant topics.

- **Take part** in ERA-LEARN events that foster **knowledge exchange and mutual learning** between actors in the Partnership landscape, including the EC, and the Partnership Knowledge Hub.[2]

Get in touch with the ERA-LEARN team to share your ideas and needs: office@era-learn.eu.

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[2] The Partnership Knowledge Hub enables working level interactions and meetings between the European Commission, Member States (and Associated Countries) and partnership representatives. It supports progress towards all objectives of the **Strategic Coordinating Process**.

Tables and figures

Tables

Figures

Abbreviations

AGA	Annotated Grant Agreement
BMR	Biennial Monitoring Report
CA	Consortium Agreement
CIS	Common Indicators Survey
CSA	Coordination and Support Action
DoA	Description of the Action
EC	European Commission
EIT	European Institute of Innovation and Technology
EIT-KICs	EIT Knowledge and Innovation Communities
ERA	European Research Area
ERDF	European Regional Development Fund
FP	Framework Programme for Research and Innovation
FSTP	Financial Support to Third Parties
GA	Grant Agreement
HE	Horizon Europe
IPR	Intellectual Property Rights
JU	Joint Undertaking
KPI	Key Performance Indicator
KIP	Key Impact Pathway
MGA	Model Grant Agreement
MCA	Model Consortium Agreement
MFF	Multiannual Financial Framework
MIM	Mutual Insurance Mechanism
MoU	Memorandum of Understanding
OLAF	European Anti-Fraud Office
PIC	Participant Identification Code
PSIPs	Partnership-Specific Impact Pathways
R&I	Research and Innovation
RPO	Research Performing Organisation
RRF	Recovery and Resilience Facility
SDGs	Sustainable Development Goals (United Nations)
SFTP	Secure File Transfer Protocol
SRIA	Strategic Research and Innovation Agenda
SME	Small and Medium-sized Enterprise
SOPs	Standard Operating Procedures
TFEU	Treaty on the Functioning of the European Union
WP	Work Programme

1. Introduction

1.1. Entering the partnership landscape

European Partnerships are strategic initiatives through which the European Commission (EC) and public and/or private partners jointly develop and implement research and innovation (R&I) programmes around specific topics.

Partnerships contribute to achieving the EU's policy priorities and addressing major societal challenges. The three partnership types differ in their legal set-up, funding schemes and the types of actors that form the partnership (see Table 1 and list of partnerships by ERA-LEARN).

Table 1 Three types of European Partnerships

Aspect	Co-programmed	Co-funded	Institutionalised
What makes it stand out?	Reflects primarily **industry priorities**, easy to start and flexible to run, and focused on industry stakeholders.	An interplay of **EU and national priorities**, with EC oversight and focus on public authorities.	**Long-term strategic focus** with dedicated implementing structures and large funding commitments.
How is it set up?	The EC and mostly private partners sign a Memorandum of Understanding (MoU).	Grant Agreement (GA) between the EC and partners, based on a proposal to a WP call.	Established under Articles 185 and 187 TFEU or within the European Institute of Innovation and Technology (EIT) framework.
Who joins?	Industry associations, large industry actors, and public research organisations.	Public funders, ministries, and public research organisations.	Article 185: Member States; Article 187 and EIT KICs: private and public actors.
How does the EU contribute financially?	Horizon Europe (HE) Work Programme (WP) calls implement the Union contribution.	EU covers 30 –50 % of the total eligible costs.	Based on dedicated regulations adopted under Articles 185 and 187 of the Treaty on the Functioning of the European Union (TFEU), or on Partnership Agreements established under the EIT Regulation.

Different partnership types, depending on their purpose and scope, feature distinct approaches to governance, implementation and financing. HE has a systematic process for selecting, implementing, and monitoring all partnerships, linking them with the strategic aims of the funding programme. All partnerships must follow the basic lifecycle criteria set out in the Horizon Europe Regulation (Annex III), with its focus on relevance, efficiency, effectiveness, coherence, and EU added value. These are complemented by partnership-specific criteria as summarised in Table 2.

Table 2 Lifecycle criteria for European Partnerships

Criterion	Description
Directionality & Additionality	A clear common strategic vision, with measurable outcomes and impacts that go beyond what would be achieved by other R&I instruments.
Coherence & Synergies	It should align with and complement the EU's R&I landscape, avoiding duplication and ensuring effective interaction with other programmes.
Transparency & Openness	The criteria are to be followed in the setting of priorities, stakeholder involvement, governance and access to partnership activities and their outcomes.
International Positioning & Visibility	The partnership should strengthen Europe's global role via cooperation beyond EU borders, when relevant, and without harming competitiveness.
Flexibility of Implementation	It must be able to adapt to evolving scientific, societal, market or policy needs, with mechanisms to adjust course over time.

There are other requirements that partnerships must follow, such as demonstrating long-term commitment, engaging in additional activities, encouraging exploitation, increasing public awareness and acceptance, and preparing an exit strategy and phase-out measures for Framework Programme (FP) funding. Most of those topics are covered in the sections that follow.

Further information

- ✓ EUR-Lex (2021). 'Horizon Europe Regulation' (Annex III).

1.2. What is a co-funded European Partnership?

Co-funded partnerships are research and innovation (R&I) initiatives that align European and national or regional priorities and funding. They are funded under Horizon Europe (HE) as Programme Co-fund Actions.

Co-funded partnerships are established through a Grant Agreement (GA; see section 2.3.) between a consortium of partners and the EU, following the successful submission of a proposal under a HE Work Programme (WP) topic. Co-funded partnerships receive EU co-funding at a fixed rate, which may vary between partnerships (30 % or 50 %, depending on the activities of the partnership), and they can incur costs eligible for EU funding in line with standard HE financial management rules.

Setting up a co-funded partnership

Consortia bring together a range of stakeholders (see sections 2.1. and 2.2.). The Consortium Agreement (CA; see section 2.4.) defines the partnership's governance, administration, and financial management of the partnership (see sections 3.1. and 3.2.), including the use of the EU co-funding. Partnerships implement a joint WP (see section 2.5.) that is agreed with the EC. To qualify for EU funding, all activities must comply with the HE cost categories.

There are two **types of partnership activities**:

- **Joint calls for proposals** (see section 3.3.) are co-funded by both the EU and national/regional funding organisations. Applicants, such as research institutions and companies from participating countries, apply for funding in line with the national/regional rules detailed in the call documents.
- **Additional activities** (see section 3.4.) include any activities that implement the partnerships and are distinct from joint calls and typically include access to data and services, shared infrastructures, capacity building, and stakeholder engagement.

Further information

- ✓ ERA-LEARN. Partnerships, in a nutshell, provide essential insights, facts and figures.
- ✓ ERA-LEARN. Training for Newcomers provides a broad overview of all relevant topics.
- ✓ European Commission. European Partnerships in Horizon Europe.
- ✓ Publications Office of the European Union (2022, 2024). 'Biennial Monitoring Reports'– are published every two years and cover the performance and impact of partnerships.

2. Governance

2.1. Partners and stakeholders

The consortium typically includes a variety of organisations with specific roles and legal status, as defined under Horizon Europe (HE) rules. Research funders and other public authorities typically form the core of the consortium.

Partner organisations collectively design, fund, and implement joint research and innovation (R&I) agendas, and their success depends on both the extent of resources mobilised and on the quality of collaboration. Actors may engage with a partnership in different ways (see Table 3 Main types of actors).

Table 3 Main types of actors

Actors type	Description	Actors and roles
Beneficiaries (contractual partners)	Signatories of the Grant Agreement (GA) with the Commission. They generate **EU co-funding based on their eligible costs.** They are accountable to the EC for governance, compliance, and alignment.	**Ministries, national and regional R&I funding agencies, sectoral agencies**, **public research organisations, non-profit organisations or private entities** steer strategy, align EU and national agendas, commit and report resources, and are responsible even when tasks are delegated.
Associated partners	Identified in the GA, but do not sign it. They do **not generate EU co-funding.** They can implement action tasks, but the costs incurred cannot be recognized as eligible costs.	**They are usually funding agencies or other organisations from countries that cannot receive EU contributions.** They contribute to implementation, provide expertise and access to infrastructures, or coordinate tasks.
Funded researchers and consortia	Selected through **the joint trans-national calls** launched by the partnership. They are not part of the GA and receive cascade funding/Financial Support to Third Parties (FSTP) via their national/regional funding agencies, which **are the GA beneficiaries.**	**Research teams, university consortia, companies, NGOs**, or other applicants, depending on the call. They engage in **R&I activities**, thus produce data and results, and contribute to monitoring, dissemination and impact assessment activities.

Types of involved actors

Partnerships can include various types of stakeholders (see Table 4), each with different roles (see section 2.2.), and the level of funding may differ between partners (see section 3.1.).

Table 4 What to consider when involving partners

Stakeholder types and examples
Public authorities: national/regional ministries, agencies, and authorities responsible for R&I or sectoral issues. They provide legitimacy, alignment with policy priorities, and may co-finance activities.
European institutions: European Commission Directorates-General (DG RTD, DG ENV, DG AGRI, etc.), other relevant institutions, such as the ECA, European Executive Agencies, and OLAF.
European networks: intergovernmental platforms (e.g., FOREST EUROPE, BIOEAST), as well as European research infrastructures and platforms (ERICs, Technology Platforms), thematic alliances.
Research and academic organisations: universities, research centres, networks. They implement projects, provide expertise, develop methods and technologies, and manage research infrastructures.
Industry actors: large companies, SMEs, sectoral alliances, public enterprises, and associations. They contribute market knowledge, innovation capacity, resources, enable commercialisation and uptake.
Civil society: non-governmental organisations and citizen groups. They enhance oversight, increase the legitimacy and relevance of results, and contribute to dissemination and adoption.
International partners: entities from third countries, international organisations (OECD, UN bodies), international partners. They extend reach, bring extra funding, introduce global agendas and processes.

Consider the following three aspects when engaging partners (see Figure 1).

Figure 1 What to consider when involving partners

Clarifying roles early on

A partnership must distinguish clearly between beneficiaries, associated partners, and actors involved in funded projects. This reduces ambiguity, prevents duplication, and ensures accountability

Coverage and diversity

Effective partnerships require a broad representation of EU Member States and Associated Countries, with attention to under-represented regions to ensure cohesion and inclusivity.

Lifecycle engagement

Different partners are most active at different stages. During the partnerships design, funders and ministries are central, while researchers and industry are critical for implementation. NGOs, international organisations and regulators are critical for dissemination and uptake.

2.2. Governance bodies and roles

Co-funded partnerships apply different governance arrangements that allow them to remain flexible in response to changing policy, societal and market needs.

Those can be divided into core governance (Table 5) and collaborative governance (Table **6**).

Table 5 Governance functions

Aspects	Function	Goals	Governance bodies
Strategic planning	High-level **strategic decisions** on budgets, plans, and membership	Align with EU priorities, reach **objectives**, and develop SRIAs	E.g.: Governing Board, General Assembly, working group
Consortium Coordination & Management	Implement **work plans, communicate**, coordinate activities, reports, and support.	Ensure **compliance**, coordinate **tasks**, and implement strategic decisions	Management Boards and work package leaders hold regular meetings and maintain communication
Call Management	Administrative tasks, **contact point,** organisation of evaluation, follow-up	Develop and implement **calls** & identify opportunities for topics aligned with the strategic focus.	Call the Secretariat, Call Management Board as the contact point for calls
Cooperation with EC Units & Executive Agency	Regular **exchange** with the project and financial officer, and administrative compliance	Smooth implementation of the partnership and efficient **communication** with EC bodies	Coordinator-led; involves EC representatives in the progress of the partnership.
National & Regional Alignment	Consider **Member States' strategies** and **regional priorities**	Exploit **synergies**, increase the **impact,** stimulate investment	Governing Boards, State Representative (Mirror) Groups; Member States
Partnership Impact Monitoring	Track progress using **harmonised indicators** and methods, learning	Provide good quality data and evidence, identify issues, and contribute to BMR	Integrated into planning, coordination, and management
Stakeholder Advice	Advice on **thematic and operational issues**	Enable **synergies**, enhance the acceptance and impact	External advisors/Advisory Boards
Compliance	Avoid **conflicts of interest**	Equal treatment, conflict of interest management	Compliance or integrated into other functions

Table 6 Collaborative governance and complementary functions

Aspects	Function	Goals	Governance bodies
Stakeholder Engagement	Establishing feedback loops with relevant actors	Addressing diverse needs	Dedicated positions in stakeholder platforms
EC Involvement (Strategic & Policy)	Regular **exchange** between the partnership and EU bodies, strategic alignment	Addressing high-level policy objectives (e.g., SDGs, Green Deal, missions)	Observers in the Partnership Knowledge Hub, dedicated boards, or reflection groups
Coordination and synergies	Build **networks** and foster synergies with other EU Partnerships and initiatives	Share knowledge, enhance awareness, exchange lessons.	E.g., partnership board, or coordination group for joint foresight exercises, SRIAs
International Cooperation	**Networking** with non-EU programs and funders for collective action, a strategic outlook on the future	Facilitate joint participation in calls and activities, knowledge exchange and access to new markets	International partners may join governance bodies or co-design/co-creation activities.

Examples of good governance can be seen in multiple partnerships. Driving Urban Transitions (DUT) uses systematic stakeholder engagement as a core governance function[3] and applies formats such as city panels, focus groups, and the DUT Synergies Forum to foster co-creation. Meanwhile, Partnership for the Assessment of Risks from Chemicals (PARC) integrates strategic oversight, national-EU coordination, and strong data protection and ethics (see Figure 2).[4]

Figure 2 PARC governance structure
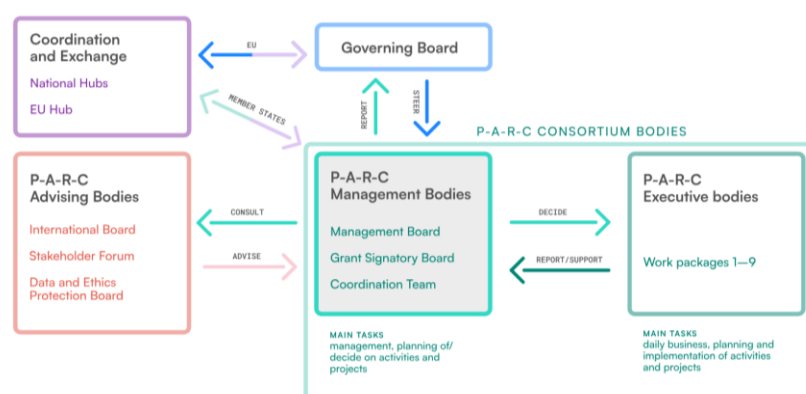
Further information

✓ ERA-LEARN. Governance Models of Horizon Europe Partnerships.

2.3. Grant Agreement

The Grant Agreement (GA) sets out the legal relationship and the funding modalities between the granting authority (the European Commission) and the beneficiaries (partners) in a co-funded partnership.

Under Horizon Europe, the Model Grant Agreement (MGA) that aims to assist applicants in preparing the GA, defines the respective roles and duties of the coordinator and the other beneficiaries and participants towards the granting authority. It also outlines procedures for addressing non-compliance situations. The GA consists of a main body and the annexes.[5] An annotated version of the MGA, providing detailed explanations of each provision, is available and is an important resource in the preparation and implementation of co-funded partnerships.

Duration

There is a single GA for the entire partnership duration, covering its active phase, during which the partnership launches calls, and the 'winding up' phase, in which the partnership focuses on implementing funded projects, reporting, and monitoring. The GA can be amended or updated, e.g., in case different budget phases related to the duration of the HE Work Programmes (WP) require a dedicated financial renewal process. Financial reporting must be separate for each phase, and, in principle, no financial transfers are allowed between phases.

Eligible costs and contributions

The eligibility criteria for costs are defined in the GA (Article 6). Costs incurred for providing FSTP are central, and specific criteria apply (see section 3.1.).

Periodic reporting and payments schedule

The reporting and payment schedule is defined under Article 4.2 of the GA and is agreed between the consortium and the Project Officer during the Grant Agreement Preparation (GAP) phase. It will influence the internal reporting and payment schedules set out in the Consortium Agreement (CA). When implementing FSTP, it is important to consider the time required to collect and report the final cost incurred by third parties at the end of their projects.

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[5] The **body** entails a preamble and the terms and conditions for the grant, including a data sheet listing all beneficiaries.
The **annexes** include: (1) the proposal (more specifically the 'Description of the Action' (DoA), the estimated budget for the action (Annex 1 and 2, followed up from the versions initially submitted), (2) the accession form, which must be signed by partners to enter the contract as Annex 3, and (3) specific rules as Annex 5. These entail a set of rules common to all types of contracts (Article 13–17) and a set of 'Specific rules for co-funded partnerships' (Article 18).

Mutual Insurance Mechanism (MIM)

This is the contribution that the granting authority will retain to address potential financial difficulties. It ranges from 5–8 % of the total grant award, and its amount is retained from the pre-financing and cleared at the final payment. It is also set out under Article 4.2 of the GA.

Integrating partners after the GA signature

To add new beneficiaries beyond those who originally signed the GA, the coordinator must submit an amendment request to the granting authority.[6] After the amendment to the GA has been signed, new beneficiaries will have the same rights and obligations as other beneficiaries, and their costs will be eligible for the EU contribution. This, however, does not increase the maximum EU contribution. New partners may also join as associated partners through an amendment.

Consortium composition

Some organisations participating in the partnership as consortium members may also wish to apply to partnership-launched calls, which may create **potential conflicts of interest.** These must be **clearly defined and managed** through appropriate measures, such as firewall structures, organisational guarantees, and equal treatment procedures. The proposal and the annexes on FSTP should clearly outline for which beneficiaries this is the case, and describe these mitigating arrangements, specifying who will prepare and manage the calls (including drafting texts and managing awards), who can apply for funding, and how impartiality is ensured.[7] More information can be found in Annex 5 – specific rules for co-funded partnerships in the Annotated Grant Agreement (AGA). Exemptions for organisations that act both as beneficiaries in a consortium and as applicants to joint calls must be requested in the proposal.

Further information

- ✓ European Commission (2024). 'Model Grant Agreement' Version 1.0, 1 November 2024.
- ✓ European Commission (2025). 'Annotated Grant Agreement' Version 2.0, 01 April 2025; in particular Articles 4.2, 6 and 18, and Annex 5.
- ✓ European Commission (2025). 'Standard application form' (HE Co-fund) – official application form template for co-funded actions used in Horizon Europe calls.
- ✓ European Commission (2025). 'Standard application form top-up' (HE Co-fund top-up)
- ✓ European Commission (2025). 'Standard evaluation form' (HE Co-fund) – standard evaluation form applied by the Commission and evaluators for co-fund proposals.
- ✓ European Commission. EU Funding & Tenders Portal – a central platform for calls, proposal submission, grant preparation, and Grant Agreement management.

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[6] The request should include an accession form (see Annex 3) signed by the new beneficiary in the Portal Amendment tool.

[7] These arrangements are part of GA annex 1 DoA, elaborated upon in terms of governance and practical organisation in the CA.

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2.4. Consortium Agreement and Internal Procedures

All beneficiaries must sign a Consortium Agreement (CA) that specifies the rights and obligations of the partners.

Each consortium must have a CA that sets out its internal rules and procedures, including the internal distribution of EU co-funding, the prevention and management of conflicts of interest, and procedures for implementing the transnational calls. Depending on their respective needs, partnerships may decide internally whether to apply different internal funding rates for different activities. Voting rights in the different governing bodies should also be specified in the CA.

Consortium Agreement vs. Grant Agreement (GA)

The CA should be in place before the GA is signed. The CA should not contradict the GA, and if it does, the GA prevails.

The CA is a contract under private law, where the Commission is not involved under any circumstances. The beneficiaries can use the CA to complement the GA. The information provided by the beneficiaries in the Description of the Action (DoA)[8] is binding, as an integral part of the GA, and cannot be contradicted by the CA. Costs incurred in preparing the CA are not eligible for funding, but costs incurred later in revising the CA are eligible.

Adaptations of standard CA guidance to meet co-fund requirements

ERA-LEARN provides a template for a 'Model Consortium Agreement', including adaptations compared to the Development of a Simplified Consortium Agreement (DESCA) Model[9] for the following sections: (1) Definitions, (6) Governance Structure, (7) Financial Provisions, (8) Call Implementation, (9) Results, (10) Access Rights, (12) Data Management, and (13.8) Settlement of Disputes.

Financial provisions

A core part of the CA is the agreement on **how the EU contribution should be used**. The EU contribution is calculated as a flat rate on reported costs and paid to the partnership's coordination *en bloc* (i.e., as a single payment). It is up to the consortium to decide how to distribute the EU contribution among the beneficiaries. ERA-LEARN recommends the distribution of the EU co-funding as described in Figure 3.

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[8] Annex 1 of the GA.

[9] DESCA Core Group (2025). DESCA Model Consortium Agreement. The DESCA model is a standard *recommended* consortium agreement template for EU-funded projects. Its use is not imposed by the European Commission and is not mandatory; rather, it is voluntary guidance developed by stakeholders to help consortia structure their internal arrangements in line with the GA.

Figure 3 Guiding principles for the distribution of funding

- Keep it as simple as possible
- Design the internal reporting along the lines of the reporting to the EC
- Consider adapting internal funding rates for different cost categories
- Consider adapting internal funding rates for different types of activities
- Forsee a reserve fund to be able to cover unexpected situations
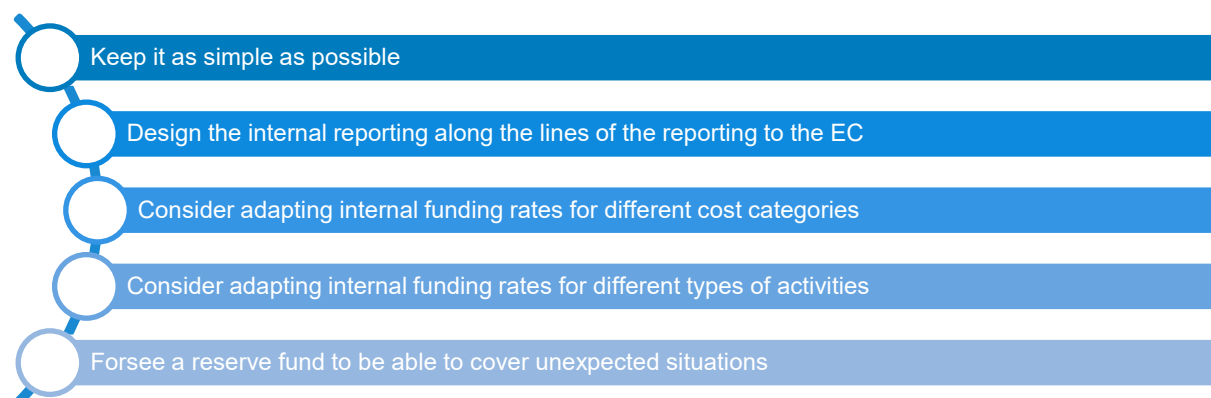
Dealing with information barriers

Typically, beneficiaries of the GA (i.e., partnership consortium members) cannot receive FSTP from a joint call launched by the same partnership. Only in exceptional cases, explicitly clarified in the CA and GA, and if sufficient firewall measures are in place, can a consortium member receive FSTP funding after applying to a joint call. The CA should include provisions to prevent any exchanges or communication that could give rise to conflicts of interest or unequal treatment of applicants and to ensure a fair and transparent complaints process. Before a call is launched, beneficiaries of a co-funded partnership who intend to apply must be excluded from all information related to the call (i.e. they should not participate in meetings where the call text is discussed).

Contractual obligations for transnational projects

Beneficiaries must ensure that their contractual obligations under specific articles[10] also applies to third parties receiving support.[11] Experience indicates that third parties do not always give sufficient attention to ensuring adequate visibility to the EU funding (see Article 17.2). Beneficiaries must ensure that bodies such as the granting authority, the European Anti-Fraud Office (OLAF), and the Court of Auditors are involved.[12]They can exercise their rights with respect to the recipients. Some funding agencies encourage final recipients to sign a CA among partners, while others require it in the final recipients' funding contracts.

Further information

✓ ERA-LEARN provides a template for a 'Model Consortium Agreement' (MCA) for co-funded partnerships. The template is based on DESCA and is available to download.
✓ European Commission (2020). 'Guidance How to draw up your H2020 consortium agreement', Version 2.2. (07 January 2020).

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[10] This concerns Articles 12 (Conflict of Interest), 13 (Confidentiality and Security), 14 (Ethics), 17.2 (Visibility), 18 (Specific Rules for Acting), 19 (Information) and 20 (Record-Keeping).

[11] Article 9.4 of the Grant Agreement 'Recipients of financial support to third parties (FSTP)'.

[12] Article 25 of the Grant Agreement.

2.5. Strategic Research and Innovation Agendas and Work Programmes

The two main tools steering the partnership strategy are the Strategic Research and Innovation Agenda (SRIA), providing a long-term perspective, and the (annual) joint Work Programmes (WP), which turn strategy into action.

Together, they provide a structured approach to move from vision to strategy, implementation, and impact. Without a SRIA, partnerships risk becoming fragmented collections of projects. Without a work programme, a SRIA remains an exercise with no real impact. Both are essential for strategic alignment across countries and institutions, sound resource use, clear communication, and accountability.

The SRIA

The SRIA is a **high-level strategy document** that outlines the long-term vision of a partnership. It provides a common direction for all partners and ensures that activities are aligned with broader EU policy and national priorities. There is no 'one size fits all' template for a SRIA, and partnerships may adopt different approaches depending on their specific field and stakeholder needs. Nonetheless, there are some common elements every SRIA should cover (Figure 4).

Figure 4 Key aspects of a SRIA

Vision and objectives	Expected impacts	Priority areas	Roadmap of activities	Impact logic
What the partnership wants to achieve over its entire lifetime.	Scientific, societal, and economic changes that the partnership is working toward.	Domains that require coordinated research and innovation.	Milestones, types of actions, and indicative timing.	How specific activities will lead to outcomes and deliver impacts.

The SRIA is the **compass** of a partnership. While it does not provide all the operational details of the partnership, it defines the strategic orientation to guide all subsequent planning. SRIAs need to include sufficient detail to establish annual and multi-annual work plans. Partnerships typically use a range of methods to drive this process, such as:

- foresight methods (scenario planning, trend analysis)
- stakeholder consultations (surveys, workshops, online forums)
- evidence reviews (mapping of existing programmes and initiatives) and
- consensus-building processes among governments and stakeholders.

The resulting document brings together all strategic aspects in a coherent manner. Partnerships revisit SRIAs every 3 to 4 years to ensure they remain relevant and responsive to new trends and policy priorities. This makes SRIAs both a flexible and a reliable reference point.

WPs of partnerships

If the SRIA is the compass, the WP is the **map**. WPs translate strategic intentions into concrete operational steps. They specify the calls for proposals or joint activities, funding modalities (budgets, cost-sharing, and eligibility conditions), implementation details (timelines, governance, monitoring, and reporting requirements), as well as deliverables and outcomes expected from funded projects and other activities. WPs are usually developed for one or two years and must remain responsive to new needs while staying consistent with the long-term SRIA. Common challenges in SRIA and WP development are outlined in Table 7.

Table 7 Challenges and ways to deal with them

Theme	Issues	Way to address them
Ensuring strategic alignment	Various authorities may pursue different priorities or similar activities, risking fragmentation or overlap.	• Run strategic joint foresight and consultations • Map initiatives to build complementarities and avoid duplication
Stakeholder involvement	Partnerships may be dominated by a few strong players, leaving out smaller actors, undermining their inclusivity and legitimacy.	• Apply inclusive consultation methods • Ensure balanced representation in governance bodies (science, policy, industry, society) • Make the partnership attractive to new actors
Translating strategy into action	A well-designed SRIA may not always translate into WPs due to short-term pressures or limited budgets.	• Make clear links between objectives and activities • Engage diverse actors in the SRIA oversight • Regularly review WPs against the SRIA goals
Balancing stability and flexibility	Partnerships need long-term direction but must adapt to crises and technological breakthroughs.	• Build periodic reviews into the SRIA • Design adaptive WPs able to integrate new activities without losing focus
Capacity and resource constraints	Partners differ in resources; smaller countries or institutions may struggle to participate fully.	• Provide capacity-building measures (training, templates, guidance) • Promote mutual exchange and learning
Monitoring and evaluation	Without clear indicators and reporting, it is hard to measure objective achievement.	• Define measurable indicators in the SRIA and embed them in Work Programme reporting • Involve independent experts in periodic evaluations

Further information (examples of SRIAs)

✓ Water4All (2022). 'Water4All's SRIA: 2022-2025', 58 pp.
✓ Eggermont et al. & Biodiversa+ partners (2021). 'SRIA. Biodiversa+', 108 pp.

3. Implementation

3.1. Financial Management

Co-funded partnerships are implemented as standard Horizon Europe (HE) projects under the same administrative and financial framework. They receive their EU contribution under the same eligible cost categories as any other HE action.

When considering the implementation of the co-funded partnership, it is important to bear in mind that the partnership is bound by EU rules through the Grant Agreement (GA). However, the FSTP calls follow national rules and the internal arrangements agreed by the consortium within the minimum obligations set out in the EC's GA.

The planned activities of the partnership that generate eligible costs are defined in the joint Work Programme (WP). The Grant Agreement defines the funding rate (typically 30 %, in some cases 50 %), reporting periods, and the related payment schedule. The EU co-funding is transferred **from the EC to the coordinator**, who then distributes it among the consortium members. The initial pre-financing is transferred to the coordinator after the GA is signed (see Figure 5). The standard payment structure is used, which involves single pre-financing, interim payments and a final payment. In the context of a co-funded partnership, *funding* can have a threefold meaning:

- **Receiving EU funding as an HE project** from a R&I framework programme perspective, based on the GA between the EU and the partnership consortium, and funding the partnership itself.
- **Providing cascading funding for a joint call** from the programme perspective of a concrete joint activity with specific rules and requirements (FSTP).
- **Individual consortium members providing funding** for their respective R&I community: from the research teams' perspective, funding for transnational R&I projects awarded to individual research groups by the respective funding organisations (partners) through national/regional grants.

Figure 5 Key steps from the partnership grant to the project implementation

European Commission
• Issues the co-funded partnership grant

Beneficiary
• Provides financial suppport to third parties/beneficiaries

Final recipient
• Implements the R&I project
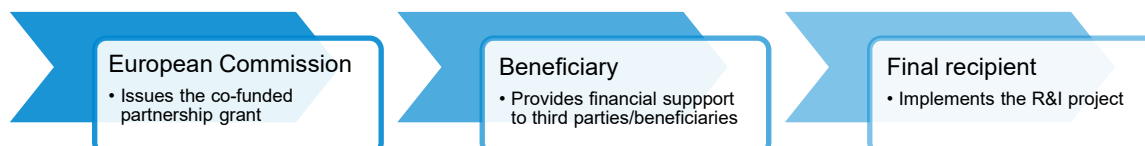
FSTP calls are implemented in accordance with national/regional rules and consortium agreements, within the minimum requirements set by the GA (See Figure 6).

Figure 6 EU rules apply directly to the partnership through the Grant Agreement
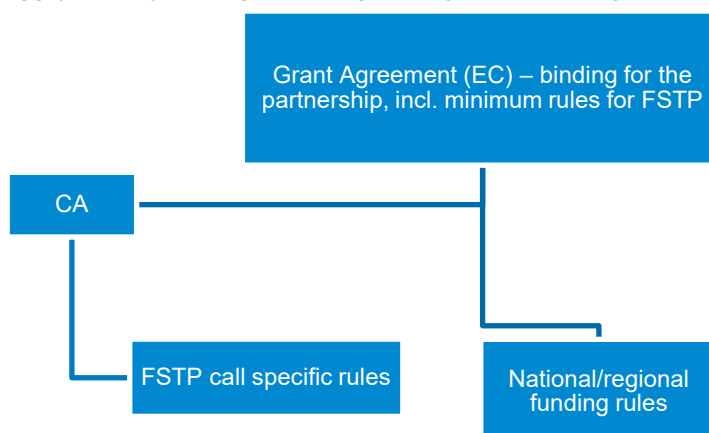
Eligible costs and EU funding

All activities implemented as defined in the Description of the Action (DoA) generate eligible costs. Co-funded partnerships usually implement two types of activities:

1. **Calls for proposals** with FSTP.
2. **Additional activities** that cover any activities that implement the partnership but are distinct from FSTP.

The eligibility criteria for costs are defined in the GA (Article 6). The consortium needs to report costs as part of the periodic reports (see section 3.5.) based on the **specific cost categories**. Indirect costs are added at a flat rate of 25 %, excluding subcontracting, and '*D. Other cost categories*', including FSTP.

Major cost items not foreseen in the GA or that do not comply with the cost categories cannot be reported as eligible costs and are not co-funded by the EU.

All partnership activities must be completed within the project period specified in the GA. For instance, all projects funded through joint calls must be completed, with all costs claimed and paid within the given period, for FSTP costs to be eligible. This should be considered when planning budgets and calls.

Some co-funded partnerships launched under the First Strategic Plan (2021-2024) are implemented via a single GA, with so-called 'top-up amendments' every HE WP cycle and aligned with the corresponding budget phases. This is due to budgetary constraints, i.e., in some cases, EU funding covering the entire duration of these partnerships could not be allocated to a single HE WP. These partnerships, therefore, have had to submit consecutive proposals every HE WP cycle (e.g., Driving Urban Transitions – DUT Phase 1 and 2) to secure EU funding via

amendments to the existing GA. Although the overall grant may be increased with the additional budget, as prescribed in the consecutive amendments, the budget lines must remain separate. Eligible costs from one phase cannot be transferred to other phases. This split can create financial risks and requires careful management. As of HE WP 2025, the European Commission has enabled the use of annual instalments for co-funded partnerships, which will eliminate the need for such top-up procedures for all co-funds launched as of HE WP 2025 and reduce the remaining top-ups for previously launched co-funds that employ this model to one.

National/regional contributions

EU funding is based on actual spending. Reporting lower costs will result in lower EU funding.

All activities implemented as defined in the DoA incur costs, which are covered by the EU contribution at the EU funding rate. The consortium must cover the remaining costs (typically 50– 70 %). For FSTP, the funding agencies and ministries in the consortium must ensure that sufficient resources are available at the national/regional level to cover the remaining costs to ensure that the partnership activities are financed (see EU contribution for FSTP in Table 8).

'In-kind activities/contributions'

The term 'in-kind contributions' in the context of European Partnerships has often confused, as it is not in line with the definition of the term in the EU's Financial Regulation, which governs all EU funding programmes and EU spending generally. HE

In the Financial Regulation and subsequently in the MGA (Article 2), 'in-kind contributions' are defined as contributions to the project from a third party, free of charge, i.e., an organisation that is not part of the consortium.

However, in the context of co-funded partnerships, the term 'in-kind' is commonly used to describe partnership costs that are not linked to FSTP, such as additional or 'in-house' activities. Correct definitions are provided in the ERA-LEARN Q&A document.[13]

To avoid confusion, the term 'in-kind activities/contributions' **should be reserved exclusively for cases that meet the definition of in-kind contributions under the Financial Regulation** and should not be used to refer to additional activities.

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[13] See: Additional Activities, section 3.4.

3.2. Internal Arrangements

Co-funded partnerships require proper internal financial administration to ensure that all beneficiaries have sufficient financial resources to implement the work plan.

Financial monitoring is an important and resource-intensive task. It may be implemented at both the individual beneficiary and partnership levels to ensure spending remains in line with the original expectations, thereby preventing unforeseen loss of EU funding. Many partnerships have agreed to create a **reserve fund** to cover any potential loss of EU funds.

Internal financial distribution of the EU contribution

While the eligible costs reported in the EU Funding & Tenders Portal generate the EU contribution, the partnership consortium should define the distribution of the EU contribution in the Consortium Agreement (CA). ERA-LEARN provides a template for a Model Consortium Agreement, based on DESCA (see section 2.4.). The consortium may agree on internal flexibility of funding rates that deviate from the standard HE funding rate and distribution, depending on their respective needs. Different types of activities may benefit from different funding rates, which may be internally adjusted across different cost categories. For example, a consortium could agree on:

- Higher (>30 %) internal funding rates for coordination and other project activities (e.g., increased workload provided by the call secretariat or task leaders for the benefit of the whole consortium).
- Lower (<30 %) internal funding rates for FSTP/transnational research projects (cost category D1). This requires higher national contributions to maintain the total EC contribution share as foreseen in the GA (e.g., 30 %).

The selection list of projects recommended for funding under the joint calls could benefit from a flexible distribution of the EU co-funding to balance the requested funding with the available national contributions and to avoid gaps in the selection list. Part of the EU financial contribution could be used to fill such gaps (see section 3.3.).Below follow several cases. The first one presents the EU contribution based on beneficiaries' needs, resulting in higher national/regional contributions for FSTP. Case 2 shows how the EU contribution is used to cover gaps in the selection list, resulting in different funding rates across beneficiaries. Case 3 combines both.

Case 1: Reshuffling the EU contribution to reimburse cost categories at different rates

Table 8 illustrates how the EU contribution is calculated (in blue) and how it may be applied (in yellow), with the total share of the EU and national contribution remaining the same. In this example, the funding rate for FSTP is reduced, while the rate for other cost categories is increased. This means that the national/regional contributions need to be increased.

Table 8 Calculation and use of the EU contribution

Standard Split

Cost Category	Actual Costs, €	EU Contribution (30% of costs), €	National Contribution (70% of costs), €
Personnel	10,000,000	3,000,000	7,000,000
Sub-contracting	5,000,000	1,500,000	3,500,000
Purchase	10,000,000	3,000,000	7,000,000
FSTP	70,000,000	21,000,000	49,000,000
Indirect	5,000,000	1,500,000	3,500,000
Total	100,000,000	30,000,000	70,000,000

Internal Agreement

Cost Category	Actual Costs, €	EU Contribution (internal agreement), €	National Contribution (internal agreement), €
Personnel	10,000,000	10,000,000	-
Sub-contracting	5,000,000	5,000,000	-
Purchase	10,000,000	10,000,000	-
FSTP	70,000,000	5,000,000	65,000,000
Indirect	5,000,000	-	5,000,000
Total	100,000,000	30,000,000	70,000,000

If the EU funding is internally distributed as shown in Table 8 (yellow; i.e., less than 30 % funding for FSTP), additional national/regional contributions to FSTP are needed (see Figure 7).

Figure 7 Illustration of the EU contribution for FSTP in EUR millions, based on Table 8
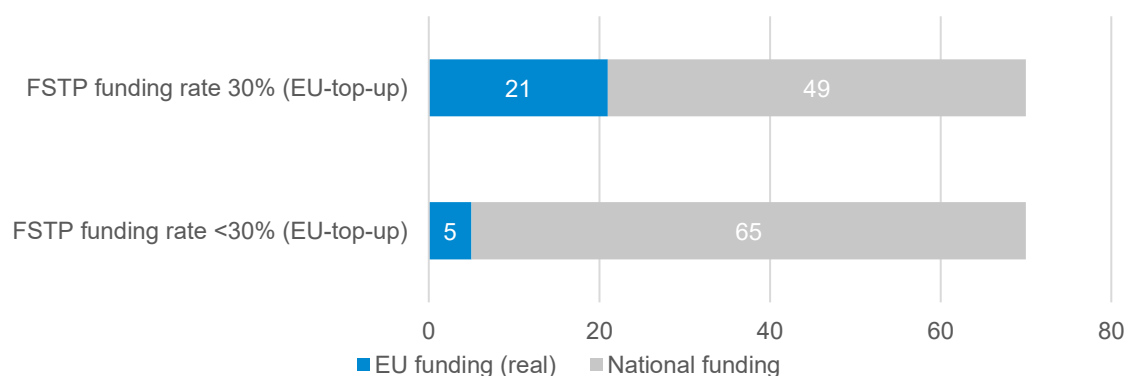
Case 2: Using the EU contribution to cover gaps in the selection list

Since individual national commitments to joint calls are collected before a call is launched, without knowing the actual demand, there is usually a mismatch between available national/regional funding and the funding requested in submitted proposals.

This imbalance often creates gaps in the selection list, thereby reducing the number of projects that could be funded and, consequently, lowering the FSTP that gets spent and the EU

contribution this generates. To overcome this, a first step may be to adjust national budgets where possible. In addition, a partnership consortium may decide to use a flexible allocation of the EC contribution according to actual needs to achieve a better balance. In this case, part of the EU contribution is used to fill gaps in the selection list wherever possible. In the CA, a possible range for the EU contribution could be defined for gap-filling. The exact amount may be determined once the final ranking list is available, and any gaps have been identified. As Table 9 illustrates that this approach results in different funding rates for FSTP across beneficiaries, based on an internally agreed allocation of the EU contribution (blue highlight: decreased EU contribution; yellow highlight: increased EU contribution, retaining the overall 30 % rate across beneficiaries).

Table 9 Flexible allocation of EU co-funding

Beneficiary	Funding requested, €	EC funding rate	EC contribution, €	Available national funding, €	Internally agreed allocation of the EC contribution, €	Resulting in an internally agreed funding rate
A	500 000	30 %	150 000	200 000	300 000	60 %
B	500 000	30 %	150 000	800 000	75 000	15 %
C	500 000	30 %	150 000	300 000	200 000	40 %
D	500 000	30 %	150 000	400 000	100 000	20 %
E	500 000	30 %	150 000	500 000	75 000	15 %
Total	**2 500 000**	**30 %**	**750 000**	**2 200 000**	**750 000**	**30 %**

Case 3: Allocation of EU contribution to cover the needs of beneficiaries and fill gaps in the selection list

As explained in the prior examples, consortia may agree on different funding rates per cost category and on a flexible approach to filling funding gaps in joint calls. These approaches, individually, create different funding rates for each beneficiary, depending on the types of actions they are involved in or their standing on the selection list. Table 10 differentiates the costs to be reported in the EU Funding & Tenders Portal and the resulting individual EU co-funding (blue table) from the internally agreed amounts (orange table). Here, the consortium has agreed that:

- Personnel costs, subcontracting, travel and subsistence, equipment, and other costs are internally reimbursed at 100 %.
- Indirect costs are not reimbursed (0 % funding rate).
- The funding rate for the cost category FSTP is reduced to 20 %.

Moreover, a reserve fund is established to cover unforeseen losses of EU funding (e.g., the withdrawal of a beneficiary or a shortage of national/regional funds). Thus, each beneficiary would end up with a different rate of EU co-funding – in some cases, higher than 30 %, in others, lower.

Table 10 Internal financial distribution example

Costs reported to EC and resulting EU contribution

Beneficiary	A. Personnel costs (€)	B. Sub-contracting costs (€)	C. Purchase costs			D.1 FSTP (€)	E. Indirect costs (€)	total eligible costs (€)	maximum EU contribution (€)	EU funding rate %	national contribution (€)	national contribution (%)
			C. 1 Travel and subsistence (€)	C. 2 Equipment (€)	C.3 Other goods (€)							
Ben .. 1	3 500 000	500 000	400 000	200 000	200 000	4 125 000	1075 000	10 000 000	3 000 000	30%	7 000 000	70%
Ben .. 2	1 800 000	500 000	400 000	200 000	200 000	16 250 000	650 000	20 000 000	6 000 000	30%	14 000 000	70%
Ben .. 3	1 400 000	500 000	400 000	200 000	200 000	26 750 000	550 000	30 000 000	9 000 000	30%	21 000 000	70%
..	1 000 000	500 000	400 000	200 000	200 000	37 250 000	450 000	40 000 000	12 000 000	30%	28 000 000	70%
Total	**7 700 000**	**2 000 000**	**1 600 000**	**800 000**	**800 000**	**84 375 000**	**2725 000**	**100 000 000**	**30 000 000**	**30%**	**70 000 000**	**70%**

Internally agreed allocation of EU contribution

Beneficiary	EU contribution to						Indirect costs (€)	reserve fund (€)	internally agreed EU contribution (€)	internally agreed funding rate (%)	national contribution (€)	national contribution (%)
	personnel costs (€)	sub-contracting costs (€)	Travel and subsistence (€)	Equipment (€)	Other goods (€)	FSTP (€)						
Ben .. 1	3 500 000	500 000	400 000	200 000	200 000	825 000			5 625 000	56%	4 375 000	44%
Ben .. 2	1 800 000	500 000	400 000	200 000	200 000	3 250 000			6 350 000	32%	13 650 000	68%
Ben .. 3	1 400 000	500 000	400 000	200 000	200 000	5 350 000			8 050 000	27%	21 950 000	73%
..	1 000 000	500 000	400 000	200 000	200 000	7 450 000			9 750 000	24%	30 250 000	76%
Total	**7 700 000**	**2 000 000**	**1 600 000**	**800 000**	**80 0000**	**16 875 000**		**225 000**	**30 000 000**	**30%**	**70000000**	**70%**
internally agreed EU funding rate	100%					20%	0%					

Internal communication on financial issues

The examples above illustrate possible approaches to internal financial arrangements. In practice, each partnership agrees on its own specific arrangements based on its needs. Organisations that participate in multiple partnerships may need to follow different financial procedures, which can be challenging.

Therefore, ERA-LEARN recommends **keeping internal rules as simple as possible**. The more complex the internal rules are, the greater the risk of misunderstanding.

Further information

- ✓ ERA-LEARN (2024). Workshop on Administrative Burden of European Partnerships in Horizon Europe.

3.3. Management of Joint Calls

Joint calls are a central activity for all co-funded partnerships. Conditions set out in the Grant Agreement (GA)[14] should be met to ensure eligibility for EU co-funding.

ERA-LEARN provides a comprehensive [call manual](#) on its website. Therefore, only key aspects are provided in this section. See the main call management rules in Figure 8:

Figure 8 Main call management rules

1. The call is published on the EU Funding & Tenders Portal.

2. A firewall has to be in place if beneficiaries are also final recipients of EU funding.

3. Standard Horizon Europe award criteria must be applied for the evaluation.

4. Selection has to follow a two-step procedure.

5. Projects should be transnational, whether mono or multi-beneficiary.

6. An independent expert prepares an observer's report.

7. The selection must be based on the ranking list or multiple lists for different topics.

Call planning and preparation

Typically, each partnership has a dedicated team (e.g. Call Secretariat, see section 2.2.) to design, prepare and implement the joint calls as well as central IT tools for proposal submission and management. Some partnerships use dedicated tools to assess if committed budgets in joint calls are adequately covering the demand expected from national or regional R&I communities. Appropriate financial commitments are required from the funding organisations participating in a joint call. Not all partners in a co-funded partnership may participate in each call, depending on alignment with national priorities and budgets. Preparation also involves devising a package of call documents and forms, and communication of the call conditions. Joint calls are published by the individual partnerships on their websites and must also be listed on the [EU Funding & Tenders Portal](#) (see the [Annotated Grant Agreement](#) (AGA) Annex 5, section specific rules for co-funded partnerships). When shared with ERA-LEARN, they will be listed on the [ERA-LEARN Portal.](#)

Submission

Transnational project proposals are usually submitted through the partnership's submission tool by the coordinator on behalf of the transnational project consortium. In some cases, some of the involved funding organisations may require a separate national/regional application for legal reasons.

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[14] European Commission (2025) [AGA – Annotated Grant Agreement.](#) EU Funding Programmes 2021-2027, Version 2.0, 01 April 2025. p. 416.

Evaluation

In addition to the mandatory requirements for the evaluation (such as award criteria, observer, etc., as mentioned in the topic overview), it is important to consider the need for national eligibility checks in step 1 of the 2-step procedure. The 'AGA' states that '*only entities/consortia that are eligible for funding under both Horizon Europe rules and national funding rules should be invited to Step 2*'.[15]

Selection list

Proposals are ranked according to their evaluation results and funded in that order by the respective funding organisations that are beneficiaries of the co-funded partnership. According to the AGA, '*if proposals have identical scores, the proposals coming from participating EU Member States or HE associated countries with still available funding can be given precedence, to maximise the number of selected projects.*'[16] The flexible internal arrangements to use part of the EU contribution for gap filling, as presented in the previous section, should be specified in the CA.

Preparing contracts for the selected transnational projects

When preparing funding contracts with successful transnational consortia, the involved funding organisations must keep in mind that their contractual obligations under specific articles[17] also apply to the third parties receiving support (recipients) (see section 2.4.). The beneficiaries must also ensure that the bodies mentioned in Article 25 (e.g., the granting authority, OLAF, Court of Auditors, etc.) can exercise their rights towards the final recipients of EU funding.[18]

Monitoring of funded projects

For each call, a defined set of data related to all submitted proposals and selected projects must be transferred to the EC database using a template provided by DG RTD (see section 3.5.

Further information

- ✓ ERA-LEARN. Implementing Joint Calls provides a manual for organising a joint call.
- ✓ ERA-LEARN. Overview of joint calls by the partnerships and similar networks.
- ✓ ERA-LEARN. Monitoring of funded projects using a DG RTD template.
- ✓ ERA-LEARN. Mutual Learning Exercise on the Impact of European Partnerships on National R&I Systems — ERA-LEARN.

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[15] Ibid. p. 419.
[16] Ibid. p. 419.
[17] This regards the following articles of the GA: 12 (conflict of interest), 13 (confidentiality and security), 14 (ethics), 17.2 (visibility)
[18] Articles: 18 (specific rules for acting), 19 (information) and 20 (record-keeping).

3.4. Additional Activities

The additional activities ensure that partnerships generate impact beyond joint funding. They are designed foster collaboration and align national and EU R&I priorities. Organisations that are members of the partnership implement these activities and mobilise resources at the national level.

Common additional activities include **data analysis, monitoring, stakeholder engagement, policy development, certification**, and the **use of infrastructures**, as described further. Such activities are defined in the individual partnerships' Strategic Research and Innovation Agendas (SRIA; see section 2.5.).

The SRIA typically includes a section or annex listing the types of additional activities expected from partners and how they are aligned with EU, national, and/or regional objectives. Additional activities are monitored through clearly defined quantitative and qualitative targets, such as the number of capacity-building actions, the amount of national co-funding, and the number of follow-up projects, with tailored mechanisms for monitoring and reporting them. The Key Performance Indicators (KPIs) are tracked at both the partnership and national levels and are included in the Biennial Monitoring Report (BMR).

The costs of additional activities are also reported to the Commission (EC) and, if eligible, generate an EC contribution. In the BMR 2024, it is reported that strategic exchanges, communication, networking, and capacity building are the most common tools used by co-funded partnerships to create synergies.

Synergies

Partnerships are expected to collaborate with other relevant R&I initiatives (including other partnerships) to ensure coherence, mitigate redundancies, and foster synergies (Figure 9).

Figure 9 How to create synergies[19]

Joint calls and topics, cross-referencing	Coordination of governance structures	Cross-initiative assemblies	Cluster of projects	Exchange of results
Formal commitment	Additional activities	Contact point structure	Visibility promotion	Events on common themes

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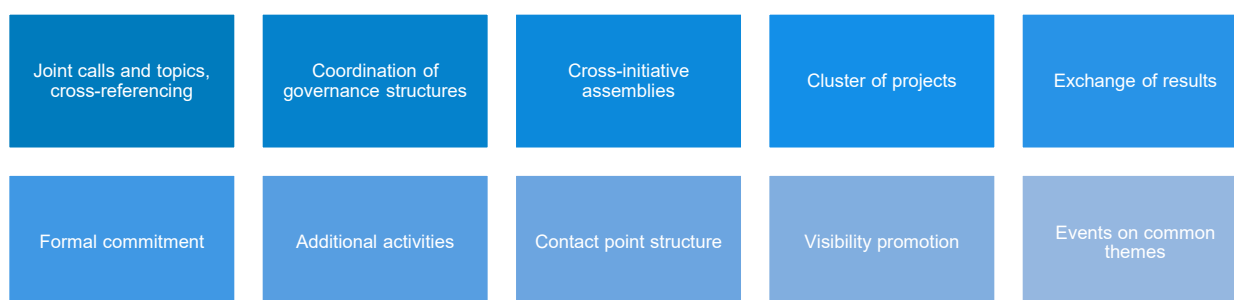
[19] Based on ERA-LEARN (2022). European Partnership Stakeholder Forum 2022 Report.

The HE Regulation and the first HE Strategic Plan outline the framework for synergy creation. ERA-LEARN provides a [toolbox and guidance on mechanisms for synergy creation](#). Synergies occur when the combined results of programmes exceed the individual impacts of the programmes. They emerge through interactions across different partnerships, other instruments, and various funding sources. Fostering synergies is assumed to enable efficient public spending, better implementation, evidence-based policy, and sound innovation cycles.

To illustrate the expected impact, it is important to describe how additional activities create synergies and to provide examples from previous or ongoing partnerships. Additional activities must create synergies with other partnerships and other EU, national, and regional programmes, as well as relevant international programmes and organisations (see Table 11).

While potential synergies may be easy to identify, they may be harder to achieve and sustain due to limited resources, competing priorities and different work cultures. Creation of synergies may also be constrained by regulatory and administrative barriers that vary across regions and countries. Thus, making synergies work requires that all involved parties invest time and effort to achieve and sustain them (see some of the most important publications in 'Further information'). These considerations must be reflected in their governance models and joint actions.

Table 11 Examples of additional activities

Activity	Description	Examples
Capacity building and networking	Many co-funded partnerships include capacity-building activities, such as training, workshops, and the development of research infrastructures and networks.	ERA4Health (European Research Area for Health Research) supports training and capacity building in clinical research. EUPAHW (European Partnership on Animal Health and Welfare) develops monitoring systems for animal health and welfare.
Policy alignment and strategic coordination	Activities to align national and EU research agendas and policies: SRIAs, mirror groups, policy dialogue.	National mirror groups, policy integration efforts, and the creation of synergies with other EU programmes and missions.
Stakeholder engagement and co-creation	Involvement of stakeholders (industry, academia, public authorities, civil society, users) in the co-design, implementation, and governance of the partnerships.	Patient involvement in ERDERA (European Rare Diseases Research Alliance). City panels in DUT (Driving Urban Transitions).
Knowledge dissemination and uptake	Dissemination of results, best practices, see more in section 5.1.	Alignment of national missions with the partnerships, national support schemes, and leveraging of ERDF and RRF funds.

International cooperation and collaboration

International collaboration with partners from third countries (those that are non-EU and non-associated) is crucial for addressing global challenges. This should be done based on the nature and themes of the partnership and defined in the SRIA, and in line with the broader considerations of open strategic autonomy and technological sovereignty. Participation by third countries and international organisations is possible via joint calls, dedicated task forces or regional 'antennas' and other mechanisms, such as:

- Allowing national funding agencies from third countries to join joint transnational calls.
- Participation as associate partners in the Grant Agreement (GA) implementing the partnership, observers, or beneficiaries, subject to national rules.
- Strategic collaboration and alignment with other international organisations.

Some examples that have been mentioned in the Biennial Monitoring Report 2024 are:

- Biodiversa+ has been able to involve several countries outside the EU in its calls, such as Brazil, Israel, Morocco, South Africa, Taiwan, Tunisia, Côte d'Ivoire and Canada.
- Innovative SMEs under the Eurostars-3 Programme, in collaboration with multiple providers, provide SMEs with access to new markets and technologies.
- ERDERA (European Rare Diseases Research Alliance) collaborated with the Critical Path Institute (C-Path, USA) on data models for drug development.
- OHAMR (One Health Antimicrobial Resistance) partnership collaborates with the World Health Organisation (WHO) and on global strategies for antimicrobial resistance.

Partnerships should adopt a differentiated approach to international activities. This commonly means embracing open collaboration at low Technology Readiness Levels (TRLs) with like-minded countries, while having stronger safeguards at higher TRLs to avoid one-sided ties with systemic rivals. Monitoring and risk mitigation mechanisms must ensure reciprocity in access, protect intellectual property, and support the mobility of researchers. It is critical to coordinate with other EU external initiatives and instruments on matters of strategic significance. Where HE limits international collaboration (for example, by restricting the eligibility of entities established in certain countries), these restrictions also apply to end beneficiaries and recipients of FSTP. Partners must therefore ensure that FSTP calls fully comply with any such restrictions.

Further information

- ✓ ERA-LEARN. Toolbox on guidance and mechanisms for synergy creation.
- ✓ ERA-LEARN (2024). Guidance on international cooperation.
- ✓ ERA-LEARN (2024). Webinar on additional activities.
- ✓ European Commission (2022). Synergies between HE and ERDF programmes.
- ✓ EU2022.CZ (2022). Prague Declaration on Synergies in the R&I Funding in Europe.
- ✓ Publications Office of the European Union (2022). Tackling R&I foreign interference.
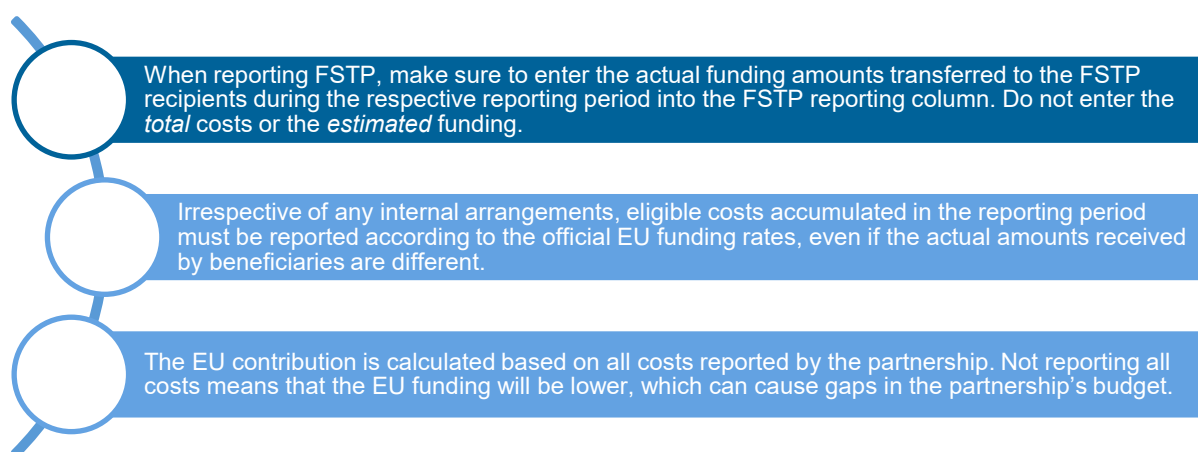
3.5. Reporting

Co-funded partnerships need to submit periodic reports in the Grant Management System in the EU Funding & Tenders Portal, as any other Horizon Europe (HE) project. The reporting periods are set out in the Grant Agreement (GA), and the reporting deadline is 60 days after the end of each reporting period. If the EC accepts a periodic report, the next instalment of EU funding will be transferred to the consortium's coordinator.

Periodic report and continuous reporting

The periodic report consists of two parts: a financial report and a technical report. The latter is based on '*continuous reporting'* on deliverables, milestones, critical risks, etc. and follows the same structure and templates as other HE reports. Co-funded partnerships need to submit specific **deliverables** according to their GA, such as annual Work Programmes (WP), partnership progress reports, and information regarding the calls, such as call text, ranking list of the proposals and call observers' reports.

For partnerships launched under the First Strategic Plan and structured in several phases through top-up calls and amendments (see section 3.1. 3.1.) The financial reporting in the EU Funding & Tenders Portal has been delayed, and the partnerships received several pre-financing instalments, delaying the first interim reports and payments until all top-ups are processed. The difference between these two types of payments is that interim payments are based on the consortium's financial reports, while pre-financings correspond to an amount agreed in the GA. To avoid some of the most common mistakes in financial reporting, ERA-LEARN suggests several main orientations (see Figure 10**Error! Reference source not found.**).

Figure 10 Common mistakes to avoid in financial reporting

When reporting FSTP, make sure to enter the actual funding amounts transferred to the FSTP recipients during the respective reporting period into the FSTP reporting column. Do not enter the *total* costs or the *estimated* funding.

Irrespective of any internal arrangements, eligible costs accumulated in the reporting period must be reported according to the official EU funding rates, even if the actual amounts received by beneficiaries are different.

The EU contribution is calculated based on all costs reported by the partnership. Not reporting all costs means that the EU funding will be lower, which can cause gaps in the partnership's budget.

Certificate on the Financial Statements (CFS)

A CFS is obligatory for all beneficiaries who request an EU contribution that reaches or exceeds the threshold of € 430,000 for the entire duration of the action. The CFS must be issued by a qualified auditor once for the whole duration of the action and submitted with the final financial report.

The project budget should anticipate whether a CFS will be required. The costs for the CFS are eligible under category *C.3 ('other goods, works or services')* and must be included in the proposal phase. The CFS is issued once for the entire project duration. Alternatively, several CFS may be prepared during the project, but they can only be submitted with the final report.

For co-funded partnerships working with internal funding agreements (see section 3.2.). It is important to know that a CFS is required whenever eligible costs are reported, regardless of whether the corresponding EU funding of € 430.000 or more is received. The Consortium Agreement (CA) should define how the related costs will be covered.

Internal Reporting

Each partnership sets its own internal reporting method and schedule (e.g., biannual reports in Excel). Because these arrangements differ between partnerships, internal reporting can be challenging for funding agencies participating in multiple partnerships (see Table 12). For example, some partnerships decide that certain expenses – such as those unrelated to core project activities – will not receive internal funding (see section 3.2.).

Data Transfer

The process of data transfer to the European Commission under HE requires partnerships to submit detailed information on all proposals (both for those selected and rejected proposals) and project-level information in a standardised and automated system using XML templates and secure SFTP transfer. This system ensures comprehensive integration of data into the Commission's central CORDA database.

Further information

- ✓ European Commission. [Online Grant Management Manual](#) on the EU Funding & Tenders Portal.
- ✓ European Commission. [EU Funding & Tenders Portal,](#) see [Templates](#) for data transfer.
- ✓ ERA-LEARN (2025). [Webinar on Data Transfer](#) for European Partnerships (including slides, templates and Q&A).

Table 12 Common reporting issues and ways to address them

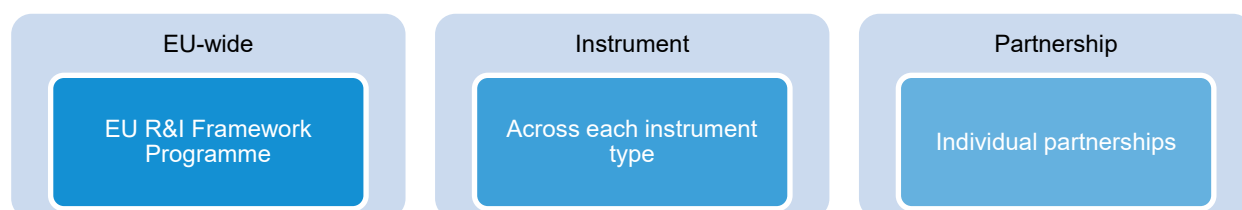|	Issue	Description
	Reporting covers both funded and unfunded proposals	Partnerships must provide structured data not only for funded projects but also for unfunded proposals. Collecting this information early in the application process for all proposals helps to avoid the need to chase unfunded applicants afterwards and makes reporting more manageable.
	The technical process can be complex	Data has to be prepared in strict XML templates and transferred securely via SFTP servers. This requires dedicated internal capacities and validation tools to avoid errors in formatting or missing information that can cause delays.
	PICs are required for all organisations	Every applicant, even those whose proposals are unsuccessful, must have a PIC. Collecting these codes retrospectively is time-consuming and impractical. Partnerships can make this easier by requiring applicants to register for a PIC as early as possible, ideally before they submit a proposal, and by providing straightforward guidance on how to do so.
	Risk of duplication across reporting systems	Some partnerships report similar information in other systems (e.g., Funding & Tenders Portal), which can lead to duplication. To reduce this, internal templates can be aligned with the EC's XML demands so that the same data feeds multiple purposes. EC encourages dialogue to reduce reporting burdens.
	The administrative load can be high	Preparing and validating large volumes of data takes specialist knowledge and significant staff time, which can be hard to find in smaller or newer partnerships. Allocating sufficient resources from the start is important.
	Current systems have limitations	Co-funded partnerships cannot use the Commission's corporate IT systems, such as the e-grant platform for running FSTP calls, including the management and reporting of FSTP projects, and the current data model does not always reflect the complexity of multi-country projects. Partnerships are encouraged to document the issues they face so they can be considered by the Commission, either in the short term or for future reference.
	Changing consortia between proposal stages complicates reporting	In two-stage calls, partners may switch between the pre-proposal and full-proposal stages, making it difficult to maintain data consistency. Partnerships can manage this by carefully tracking changes and designing their own reporting templates to capture both pre- and full-proposal information in a way that is easy to reconcile later.

4. Monitoring and Evaluation

The progress and achievements of European Partnerships as a policy instrument need to be monitored and regularly evaluated at three levels (Figure 11):

Figure 11 Three levels of monitoring and evaluation

EU-wide	Instrument	Partnership
EU R&I Framework Programme	Across each instrument type	Individual partnerships

4.1. The partnership level

At the partnership level, the objective is to assess the progress of the partnership implementation in achieving its expected objectives and impacts.

This level covers the internal monitoring and evaluation of an individual partnership, including activities based on its WPs, management system, and governance. Formative evaluations aim to improve performance during implementation, while summative evaluations are conducted at the end of an intervention to determine the extent to which goals and impacts have been achieved.

Any evaluation exercise requires a regular data-collection built on robust and comprehensive and data, thus reducing the need to collect retrospective information, some of which may have been forgotten or lost. It is best to implement streamlined and continuous monitoring, ensuring the collection of the right data at the right time.

The ERA-LEARN R^{2}IPE toolkit (Revised Research and Innovation Partnership Evaluation) provides evaluation basics and presents the BMR approach to evaluation. The first part covers a broad range of foundational topics, including the monitoring system, intervention logic, evaluation timing and questions, data collection, data analysis, and the use of results in areas such as report quality and communication. It also addresses the challenges involved in M&E of partnerships, with each topic enriched by practical examples and good practice tips. The toolkit also outlines the BMR requirements and explores complementary of the new approach at multiple levels: the partnership level, the country level, and the EC level. The toolkit also provides a glossary, further reading materials, tools for internal review of participation in networks, and a list of criteria to access network participation.

4.2. The instrument level

Under Horizon Europe (HE), partnerships benefit from a coherent and impact-driven approach backed up by the Strategic Coordinating Process (SCP).

The SCP provides policymakers with evidence on the impacts and added value of the partnership approach, while offering partnerships **feedback** and **advice** on cross-cutting issues. Evidence of impact submitted by the partnerships is aggregated within the **Biennial Monitoring Report** (BMR). This report supports strategic discussions on partnerships as an R&I instrument and builds on the following sources:

- ERA-LEARN. Common Indicators Survey (CIS) covering all types of partnerships based on a common indicator framework aligned with the lifecycle criteria set out in the Horizon Europe legal base (Annex III).
- Contribution of partnerships to EU policy objectives and the United Nations' Sustainable Development Goals (SDGs).
- ERA-LEARN. Country fiches providing information on the 27 EU Member States and select Associated Countries.
- ERA-LEARN. Partnership fiches of the individual European Partnership performance.

The BMR is published every two years, with four editions in total (2022, 2024, 2026, and 2028). Partnerships are required to contribute to the evidence-gathering process through the CIS and the partnership fiches. The BMR process complements both the internal monitoring and evaluation of individual partnerships and the broader HE approach to evaluating R&I projects. (see Table 13).

Table 13 Systemic approach for monitoring and evaluation

Partnership as a policy instrument	Partnership-specific monitoring frameworks	Common indicators
Supported R&I projects		Key Impact Pathways
	Partnership-specific	Horizontal/cross-cutting

The light blue part of the R²IPE toolkit includes the BMR approach to monitoring and evaluation of Partnerships under Horizon Europe. It includes dedicated sections at the partnership and the country levels, covering the following aspects: (1) Building a monitoring and evaluation system, (2) Data collection process, (3) Filling in the Common Indicators Survey, (4) Filling in the Partnership Fiches, (5) Filling in the Country Fiches, (6) Timing and steps of involvement or partnerships and countries (6) Roles in data collection, storage, and analysis of the EC, countries, and partnerships.

4.3. The Framework Programme

The monitoring and evaluation (M&E) of the Horizon Europe (HE) programme are mandated by EU law. Partnerships are subject to evaluation as HE R&I instrument.

Monitoring and reporting

Article 5 of the HE Regulation sets out the monitoring requirements for the FP, including European Partnerships. The key provision stipulates that '*[in] particular, data for projects funded under ERC, European Partnerships, missions, the EIC and the EIT shall be included in the same database.*' CORDA is the single database used for this purpose, and the obligation to transfer FSTP data derives from this Article (see section 3.5.

Evaluation

The evaluation of HE draws on multiple sources, including the Biennial Monitoring Report (BMR), the HE Dashboard, interviews, and others. Two evaluations of HE are foreseen in the regulation: an interim evaluation (published in April 2025) and an ex post evaluation (to be carried out after the programme's completion).

The evaluation is conducted along several main lines: the core 'Better regulation criteria' (see Table 14), partnership-specific criteria mentioned in section 1.1. and Key Impact Pathways.

Table 14 Better regulation criteria used for the evaluation of the EU R&I programmes

Criteria	Underlying guiding questions
Relevance	Is the program addressing the right challenges and priorities for the EU?
Coherence	Is the program consistent with other EU policies?
Efficiency	Is the program delivering its results with a reasonable number of resources?
Effectiveness	Is the program achieving its stated objectives?
EU Added Value	Does the program provide a benefit that couldn't be achieved by national/regional actions alone?

The KIPs, introduced in HE, enable the capture and communication of the programme's diverse impacts through clear narratives encompassing scientific, social and economic impacts. The KIPs framework is applied across different levels of the HE programme, including supporting alignment of the partnership intervention logics with HE objectives and M&E impacts at the project level. This approach is equally relevant for the partnerships and their supported projects.

Evaluations of the EC Framework Programme are usually commissioned to external experts, who, based on an agreed methodology, may also contact partnership representatives for specific information and data.

4.4. Challenges and solutions for monitoring and evaluation

While effective monitoring and evaluation (M&E) can be challenging, there are common good practices to learn from. The challenges can often stem from recurring issues such as missing or inconsistent data, different interpretations of terms, a lack of clear causality, or difficulties in demonstrating contributions to policy goals. It is therefore essential to invest resources early to build the necessary capacities from the start for effective M&E.

The Common Indicators Survey (CIS)

The CIS requires partnerships to provide data on a range of indicators, based on the partnership's lifecycle criteria, as set out in Annex III of the Horizon Europe (HE) Regulation. However, in some cases, it is not possible to establish baselines or targets for certain indicators, limiting the ability to track progress over time. Additionally, some indicators may be harder to monitor, such as those related to investments triggered by participation in partnerships beyond partners' direct contributions, or the complementary and cumulative funding from other EU, national and regional sources. There are also many areas where guidance remains limited, such as in capturing contributions to the EU policy goals. In other cases, terms like 'additional activities' are often interpreted and treated differently across different partnership types (see section 3.4).

The European Commission is continually working to clarify terms and concepts and to simplify the data/evidence collection process for the BMR. At the same time, ERA-LEARN organises training sessions, including on monitoring and evaluation, to which the relevant partnership staff are invited. It is crucial to capitalise on these opportunities and build on existing knowledge and experience, rather than duplicating previous efforts.

The Biennial Monitoring Report's (BMR) Partnership Fiches

Experience with the first two BMRs has shown that partnerships have used a wide variety of graphs and schemes to depict their intervention logics. While this diversity is not inherently problematic, it is important to ensure alignment with standard evaluation terminology (e.g., outputs, outcomes, and impacts) and to draw on best practices for developing Partnership-specific Impact Pathways (PSIPs).

Partnerships should demonstrate a clear connection between set objectives and defined indicators, supported by concrete and measurable Key Performance Indicators (KPIs) linked to PSIPs and integrated into partnership lifecycle plans with well-defined baselines. At the same time, it is important to avoid an excessive number of indicators, which can reduce focus and manageability. Overall, monitoring and evaluation frameworks should be specific, practical and proportionate. Interactive instances, such as preparing the BMR, provide valuable opportunities to clarify open issues in cooperation with partnership representatives.

The BMR's Country Fiches

The BMR process also involves close interaction with country representatives. Sufficient time should be allocated for national authorities to review pre-filled-in data and to provide the required qualitative information. In some cases, the management of participation in partnerships is highly decentralised, requiring the engagement of multiple actors in the data completion process. Data collection at the national level depends on the existence of a national monitoring system. While such systems are often still under development, they should, to the extent possible, align with the EC's system to ensure coherence and comparability.

Further information

Examples of sections from the R²IPE toolkit:

- ✓ ERA-LEARN. Monitoring and Evaluation of European R&I Partnerships
- ✓ ERA-LEARN. Intervention logic (logic frame) provides an example.
- ✓ ERA-LEARN. Typology and examples of outputs, outcomes, and impacts.
- ✓ ERA-LEARN. Interviews tips and examples of templates for data collection
- ✓ ERA-LEARN. Project case studies methodology and examples of templates.
- ✓ ERA-LEARN. Targeted questionnaire surveys with tips and examples
- ✓ ERA-LEARN. Filling in the Partnership Fiches process and an annotated template.
- ✓ ERA-LEARN. Developing a PSIPs and a KPIs table with good practice cases.
- ✓ ERA-LEARN. Checklist for countries for data collection.
- ✓ ERA-LEARN. Filling in the country fiche process and an annotated template.

ERA-LEARN has also hosted several webinars to support partnerships in developing their own monitoring and evaluation systems in responding effectively to BMR requirements. The slides include lessons learned, advice for partnerships and Member States, good practice tips and examples, and Q&A summaries:

- ✓ ERA-LEARN (2023). Webinar on Monitoring & Evaluation of Partnerships based on the BMR approach.
- ✓ ERA-LEARN (2022). Webinar on The new Monitoring and Evaluation (M&E) Framework for Partnerships.

In addition, the BMR expert group produced recommendations on the monitoring and development of the European Partnership landscape in 2022 and 2024, building on the experiences and lessons learned from the first two BMR exercises.

- ✓ Publications Office of the European Union (2024). Recommendations regarding monitoring and development of the European partnership landscape – Improving the monitoring of European partnerships and strengthening the development of the European partnership landscape.
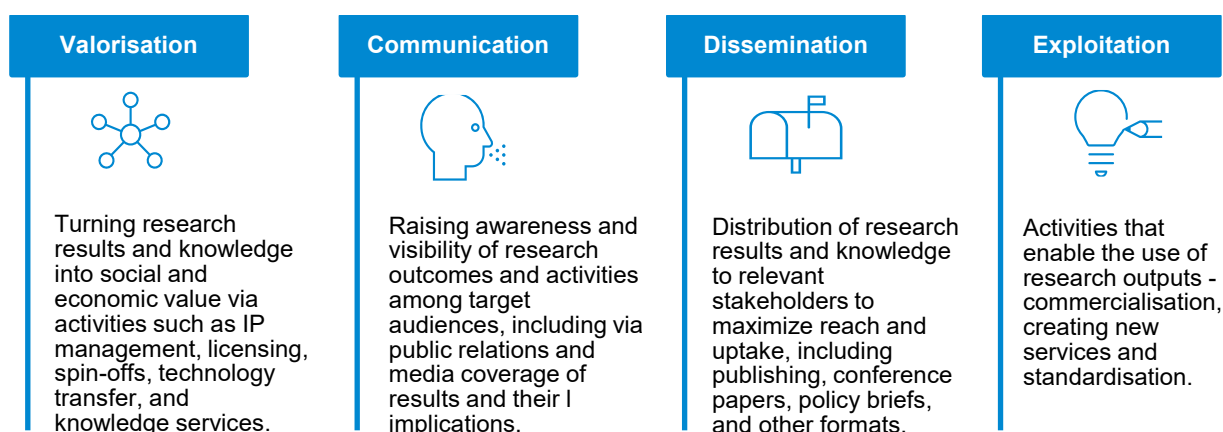
5. Broader Topics

5.1. Knowledge valorisation, communication, dissemination and exploitation

Knowledge valorisation has become a key topic in research and innovation (R&I) policy, emphasising the need to ensure that research outputs are useful and relevant to stakeholders. Effective valorisation enables partnerships and funded projects to maximise impact and demonstrate the value of R&I investments.

The European Commission defines knowledge valorisation as '*the process of creating social and economic value from knowledge by linking different areas and sectors and by transforming data, know-how and research results into sustainable products, services, solutions and knowledge-based policies that benefit society'.*[20] It is important to distinguish knowledge valorisation from other types of activities (see Figure 12) such as communication, dissemination and exploitation, as valorisation encompasses a broader, long-term process of transforming knowledge into tangible societal and economic benefits.

Figure 12 Definition of terms (simplified definitions based on official EC definitions)

Valorisation	Communication	Dissemination	Exploitation
Turning research results and knowledge into social and economic value via activities such as IP management, licensing, spin-offs, technology transfer, and knowledge services.	Raising awareness and visibility of research outcomes and activities among target audiences, including via public relations and media coverage of results and their I implications.	Distribution of research results and knowledge to relevant stakeholders to maximize reach and uptake, including publishing, conference papers, policy briefs, and other formats.	Activities that enable the use of research outputs - commercialisation, creating new services and standardisation.

Knowledge valorisation (Figure 13) highlights the importance of value co-creation, relevance, and responsiveness to stakeholder needs, also going beyond a linear view of R&I activities. It focuses on real-world challenges faced by stakeholders and meeting their evolving needs, connecting stakeholder engagement, call development, project support, networking, and other measures.

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[20] European Commission (2025). EU valorisation policy: making research results work for society.

Figure 13 Valorisation activities

Building innovation ecosystems	Fostering joint research	Early stakeholder involvement	Management of intellectual assets	Developing enabling structures	Policy recommendations	Creation of start-ups, spin-offs	Engaging in standardisation
Linking academia, industry, public bodies, and civil society.	Exchanges, and mobility schemes between research institutions and businesses.	Ensure relevance, build trust, and enhance potential for real-world uptake.	Maximise value for society & economy.	Innovation hubs, accelerators. Connect research, companies, and investors.	Foster regulatory developments by translating results.	Transform research outputs into market-ready products and services.	Ensure interoperability Advance safety, quality, and broad uptake.

Effective knowledge valorisation does not occur automatically. Table 15 outlines common challenges and corresponding approaches to address them.

Table 15 Knowledge valorisation challenges

Challenge	Description	How to address it
Overcoming fragmentation and ensuring relevance	Co-funded partnerships often span multiple countries and funding agencies, leading to fragmented activities and uneven uptake of results.	Create joint platforms and adopt open-access or FAIR data policies to aggregate results and enable cross-border and cross-sector adoption. At the same time, ensure that contextual needs are taken into account.
Staying in touch with changing needs and demands	Societal expectations and markets evolve rapidly, while R&I funding cycles are often long, with time lags between the issuance of calls and the start of projects.	Include 'reality checks' in call design, considering future outlooks and the pace of developments within a given area. Reward co-creation and early-stage engagement and establish mechanisms to capture new needs.
Delayed outcomes and value creation	Uptake often occurs after project completion, making it harder to demonstrate value in real time.	Monitor interim outcomes and early signals of valorisation, such as licensing activities, policy uptake, and user feedback.
Navigating IP and data management rules	Different national rules on intellectual property or data sharing can block wider exploitation of results.	Develop harmonised IP templates and data-sharing agreements to reduce barriers and accelerate transfer to end-users.

There are many good examples of knowledge valorisation, such as those featured within the EC's Knowledge Valorisation Platform and in the 'ERA-LEARN Two Decades of European Partnerships' brochure (see a few prominent examples in Table 16).

Table 16 Knowledge valorisation examples

Examples
The Atlas is the first database of European water-related innovation initiatives, supporting learning across the innovation ecosystem and providing the basis for a network of test facilities to enhance collaboration.
The CETP Impact Network links projects to intermediaries, living labs, test beds, associations, and clusters. Its complementary tool, the Impact Library, provides exploitation methodologies, instructional videos, webinars, guidelines, and networking opportunities to help projects move from research to market.
The Sharework Project has developed 14 integrated software and hardware mechatronics modules that enable robots to collaborate safely with human operators and overcome human-related barriers. These solutions have been successfully validated in different industrial environments by demonstrating human-robot interaction.
BATT4EU's Battery Pass project advances knowledge valorisation by creating trusted digital data spaces for transparent material tracking across battery value chains. Collaborating with bodies like the Global Battery Alliance connects research with regulatory frameworks, such as the Critical Raw Materials Act, to develop interoperable battery passports. This accelerates uptake, supports the circular economy, and strengthens the EU's sustainable battery industries.
Europe's Rail exemplifies knowledge valorisation by transforming research on automated freight operation and rail standardisation into industry-ready solutions. It's an MoU with CEN and CENELEC that harmonised cross-border procedures. At the same time, field tests of interoperable automated train units under the European Train Control System (ETCS) represent a milestone in digital freight transport. These advancements translate R&I investments into competitive technologies that improve rail sustainability and market integration in the European rail sector.

Further information

- ✓ European Union Publication's Office (2022). 'Council Recommendation (EU) 2022/2415' of 2 December 2022 on the guiding principles for knowledge valorisation.
- ✓ EUR-Lex (2023). Commission Recommendation (EU) 2023/499 of 1 March 2023 on a Code of Practice on the management of intellectual assets for knowledge valorisation.
- ✓ EUR-Lex (2024). Commission Recommendation (EU) 2024/736 of 1 March 2024 on a Code of Practice on citizen engagement for knowledge valorisation.
- ✓ EUR-Lex (2024). Commission Recommendation (EU) 2024/774 of 1 March 2024 on a Code of Practice on industry-academia co-creation for knowledge valorisation.
- ✓ ERA-LEARN. Knowledge Valorisation and Stakeholder Engagement.

5.2. Phasing-out

Under Horizon Europe (HE), every European Partnership must develop a phasing-out strategy.[21] It helps partnerships articulate how they can continue beyond the EU Framework Programme (FP) funding using alternative public, private, or structural means. The strategy is intended to secure legacy, ensure continuity, and strengthen resilience.

The development of a phasing-out strategy (Table 17) to exit from FP funding was supposed to be an ex-ante selection criterion for all partnerships (HE Regulation, Annex III). However, this was not enforced in the selection process, resulting in varied timelines depending on the partnership type.

Table 17 Checklist for the Phasing-out strategy preparation

Requirements
☑ The strategy includes at least **one credible scenario** without EU FP funding**.**
☑ Each scenario proposes an **alternative implementation modality** to achieve the policy purpose of the partnership, and a realistic, actionable **pathway and an indicative timeline.**
☑ Each scenario includes **indicators for assessing progress** towards the phasing out (e.g., amount of funding from other sources.
☑ The scenarios are **consistent with the partnership's overall strategic orientation and coherent with its policy context** at the time.

Following additional guidance from the European Commission (EC) on phasing out, all partnerships are expected to have the first version of their phasing-out strategy ready by March 2026. The strategy must include at least one credible future scenario without FP funding to be considered compliant with the HE Regulation. Still, it may include additional scenarios with FP funding, should the partnerships wish to develop them. The strategy should be treated as a living document, evolving in response to contextual developments that may affect the partnership's long-term prospects.

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[21] European Parliament and the Council (2021). Regulation (EU) 2021/695l, 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, OJ L 170, 12 May 2021, p. 1–68. See: Article 10.2(c); Annex III.

IraSME phasing-out example

When EU funding ended, partnership coordination moved from Brussels to the AiF Projekt GmbH, under the German Ministry of Economic Affairs. Although several partners left, the core group continued and expanded with new international members. The network simplified its structures, reduced coordination effort and kept its core activities alive: twice-yearly joint calls, SME–RTO cooperation and a platform for programme managers to exchange experiences. Over time, the leaner model has provided stability, supporting more than a thousand SME-led projects.

EIT Food Example

EIT Food is pursuing a future-proof mix of grants, commercial services, and investment returns, alongside a growing portfolio of startup equity. A key challenge lies in maintaining neutrality and trust as funding sources diversify. While partnership fees are expected to stabilise, corporate finance offers new opportunities but introduces the potential risks of perceived or actual influence. To sustain credibility and effectiveness, EIT Food applies transparent corporate engagement rules, robust governance mechanisms, and continues to invest in funding diversification.

EIT Digital

EIT Digital is transitioning towards an exit while reinforcing financial resilience. Predictable income sources include tuition and programme fees, with the Master School generating around € 2 million annually, of which € 500,000 is reinvested in scholarships. Its equity portfolio and a broad network of startups and alumni further enhance value creation. Education remains a driver of growth and retention (89 % of Master School graduates remain in Europe). In addition, EIT Digital engages in venture activities and ecosystem-building initiatives, reinforcing its role as a strategic platform aligned with its broader mission.

Further Information

- ✓ European Commission (2025). Commission Guidance Note 'Phasing-out strategies: framing the future of each European Partnership'.
- ✓ ERA-LEARN (2025). Workshop on the design of phasing-out strategies.
- ✓ European Commission (2025). Frequently Asked Questions on phasing-out strategies.

Key terms

The terms included here are those that appear frequently throughout the guide and that may be challenging to understand at first. This short glossary helps to clarify overlapping terminology and prevent confusion between terms that sound similar but differ in meaning. More detailed explanations and additional definitions are provided in later sections of the guide.

Table 18 Key terms

Term	Meaning
Additional activities	Any activities beyond joint calls that implement the partnership (e.g., capacity building, knowledge valorisation, and reinforcing links with infrastructures); this applies only to co-funded partnerships.
Biennial Monitoring Report (BMR)	System-level assessment of the European Partnerships' instrument providing evidence on performance, additionality, openness, synergies, and policy impact.
Call Secretariat/Call Management	Central function/team that designs and manages joint calls, coordinates evaluation, ranking lists and gap-filling procedures.
Transnational call	Calls where national/regional funders and the EU co-finance the applicants.
Common Indicators Survey (CIS)	Standardised survey feeding the BMR with metrics on directionality, additionality, openness, internationalisation, and synergies.
Conflict-of-interest management	Measures in GA/CA to ensure equal treatment of beneficiaries.
Consortium Agreement (CA)	Private-law contract among beneficiaries complementing the Grant Agreement, that defines internal governance, financial management, voting rights, call firewalls, etc.
CORDA/eCORDA	Commission's central database for proposal/project data; partnerships submit structured data via XML/SFTP for monitoring and analysis.
DESCA 2.0	Widely used Model Consortium Agreement for Horizon Europe projects. The new version (2.0) also addresses associated partners and different action types.
Financial Support to Third Parties (FSTP)	The partnership implements funding for joint transnational calls. Also called 'cascade funding'.

Gap-filling	Use of a share of the EU contribution to complete ranked funding lists when a national funder runs out of budget.
In-kind contribution	In-kind contributions provided by third parties free of charge may be declared as eligible direct costs provided that they concern only direct costs and that they have been included in the Description of Action (Annex 1 of GA). For more details, see the Model Grant Agreement in Horizon Europe.
Key Impact Pathway (KIP)	Horizon Europe's impact monitoring framework (nine storylines across scientific, societal, and economic dimensions). Partnerships align their specific pathways to KIPs.
Mutual Insurance Mechanism (MIM)	Central risk-sharing fund (5–8% withheld from EU pre-financing) that safeguards the programme against beneficiary defaults.
Participant Identification Code (PIC)	Unique organisation identifier required for all applicants to enable standardised data exchange and reporting across EC systems.
Partnership Knowledge Hub (PKH)	Commission-led expert group that supports strategic coordination across partnerships (e.g., common indicators, monitoring topics) and interfaces with the BMR process.
Partnership-Specific Impact Pathways (PSIP)	Partnership-level impact logics and indicators aligned to KIPs, used in monitoring/fiches and to evidence added value.
Strategic Coordinating Process	The governance process in Horizon Europe aligns partnership portfolios with strategic priorities and provides feedback on cross-cutting issues.
Strategic Research & Innovation Agenda (SRIA)	A partnership's long-term strategy that guides annual Work Programmes and call topics, updated periodically.
(Joint Annual) Work Programme (as opposed to HE WP)	Annual/multi-annual operational plan agreed between the EC and the partnership, translating the SRIA into calls and activities with dedicated budgets and timelines.

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