

Implementing co-funded European Partnership: a Training for Newcomers

29 – 30 September 2025



	Agenda	Speaker
	Moderation: Tor Ivar Eikaas, ERA-LEARN	
09:00	Tools provided by ERA-LEARN	Christiane Wehle (ERA-LEARN)
	Financial requirements of the Grant Agreement	Dominika Trzaska and Gianmaria Maule, REA.B.2
	Q&A	
	Internal financial arrangements	Roland Brandenburg (ERA-LEARN)
11:00	Break	
11:30	Example: How do we finance our Partnership?	Nicolas Tinois, Agroecology
	Data Transfer and BMR requirements	Francesco Di Pierluigi, European Commission Effie Amanatidou, ERA-LEARN
	Phasing out strategy towards a sustainable ecosystem	Kathrin Kapfinger, Team leader European Partnerships, DG RTD, G.4
	Q&A	
13:00	Closing hybrid part	

Tools provided by ERA-LEARN

Overview of available material to support the implementation of co-funded European Partnerships

Christiane Wehle (ERA-LEARN)

- Overview on ERA-LEARN communication channels
- Most relevant information and tools picked up by stakeholders
- How to get there – test yourselves

***If I only had known!!!
... don't let this happen to you!***



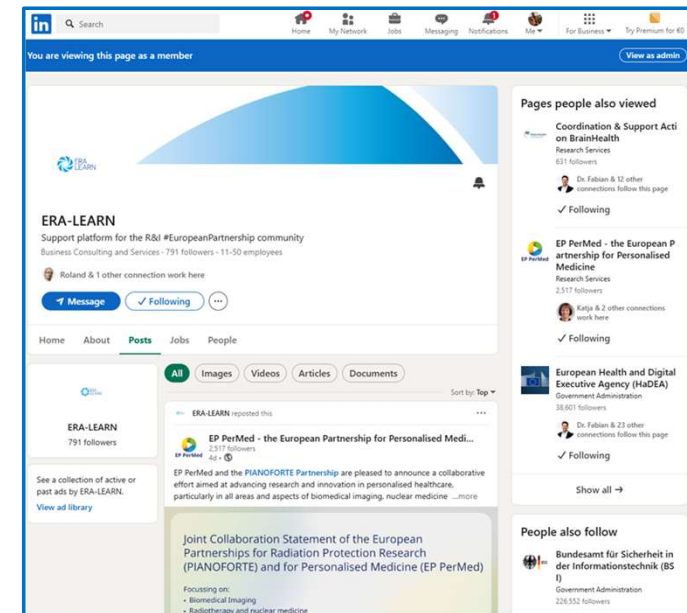
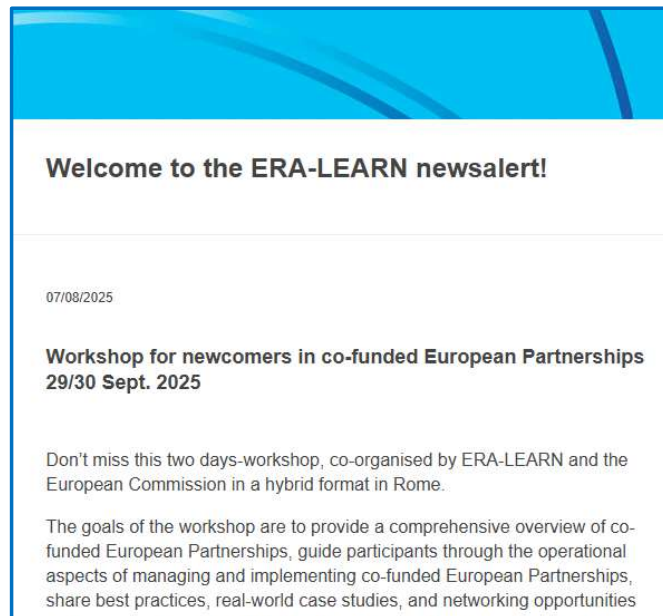
ERA-Learn: information hub for European Partnerships

Communication channels – how we provide information

Website: www.eralearn.eu
(around 20.000 monthly visits)

Newsalert
(almost 3500 recipients)

LinkedIn
(almost 900 followers)



ERA-LEARN reaches out to all stakeholders - therefore:

- Broad spectrum of information (targeted to actors from different formats, different sectors and with different level of knowledge)
 - Different level of detail of information (general vs. very specific)
 - Different number of targeted actors (e.g. PKH vs. Newcomers)
 - Needs might shift according to current developments and maturity of Partnerships
 - History: Information beyond HEU (FP9)/ legacy

Note: we always reach out to find out about your learning needs – we depend on your feedback!

Mostly needed information: observations on most relevant information

Guide through the ERA-LEARN web portal:

- Information mostly asked for
- How would you get there?



"Once I learn how to use Google, isn't that all the education I really need?"

Central information hub: the ERA-LEARN portal

<https://www.era-learn.eu>



- **Partnerships in a nutshell**
 - Strategic Coordinating Process
 - Types & Portfolio
- **Explore Partnerships**
 - networks
 - countries
 - projects
 - calls
- **Support for Partnerships**
 - Governance & financial issues
 - Joint calls
 - Additional activities
- **Documents**
 - Annual Reports & Country Reports
 - external documents
- **News & events**

Observations: Tools and support found most relevant by community

General observation:

- Stakeholders rely on ERA-LEARN to centralise information and provide overviews and summaries from other sources. (EC, BMR and expert groups).

Mostly asked for - Partnerships in a nutshell:

- Information on FP10
- Partnership Portfolio (fulfils the need for a easy findable overview)

Partnerships in a nutshell: European Partnership portfolio



Upcoming calls for Partnerships in HE work programmes

Horizon Europe Calls for Partnerships

2025: Partnership related Horizon Europe calls

Title / Call Identifier	Type of Action	Budget	Call closure
<u>Cluster 1: Health</u>			
HORIZON-HLTH-2025-02-DISEASE-01: European Partnership for Brain Health	Programme Co-funded Actions	150 M€	03 June 2025
HORIZON-HLTH-2025-02-DISEASE-02: European partnership fostering a European Research Area (ERA) for health research (Phase 2)	Programme Co-funded Actions	77 M€	03 June 2025
<u>Cluster 2: Culture, Creativity, Inclusive Societies</u>			
HORIZON-CL2-2025-01-HERITAGE-01: Co-funded European partnership for Resilient Cultural Heritage	Programme Co-funded Actions	60 M€	15 Sept. 2025
<u>Cluster 4: Digital, Industry and Space</u>			

How to get there

Observations: Tools and support found most relevant by community

Mostly asked for - Explore Partnerships: ERA-LEARN database

- Remains most relevant point of information for networks
- Information on all past and current “Partnerships”
- Lists countries and organisations
- Provides details on calls and links to websites

ERA-LEARN database

Explore Partnerships

Home / Explore Partnerships / Partnerships

Partnerships

Search table ...						
NAME	START DATE	END DATE	FUNDING FRAMEWORK	PARTNERSHIP FORMAT	COUNTRIES	COORDINATOR
Pandemic Preparedness European Partnership on Pandemic Preparedness	01/01/2026	31/12/2032	Horizon Europe	Co-funded Partnership	21	Pending
Agriculture of Data Agriculture of data	Pending	Pending	Horizon Europe	Co-funded Partnership	0	Pending
Brain Health Brain Health	Pending	Pending	Horizon Europe	Co-funded Partnership	0	Pending
EUPI-PV Solar Photovoltaics	Pending	31/12/2030	Horizon Europe	Co-programmed Partnership	0	EPIA SolarPower Europe Aisbl
Forests and Forestry for a Sustainable Future Forests and Forestry for a Sustainable Future	Pending	Pending	Horizon Europe	Co-funded Partnership	0	Pending
Innovative Materials for the	Pending	31/12/2030	Horizon Europe	Co-programmed	0	IAM-I

Filter Partnerships

Countries participating

Select countries

Organisation participating

Select organisation

Internationalisation

- ☐ Show participation of associated countries
- ☐ Show participation of third countries

Partnership format

All

Partnership status



- We rely on you to keep the database updated!

- [How to get there: Quick tour through the database](#)

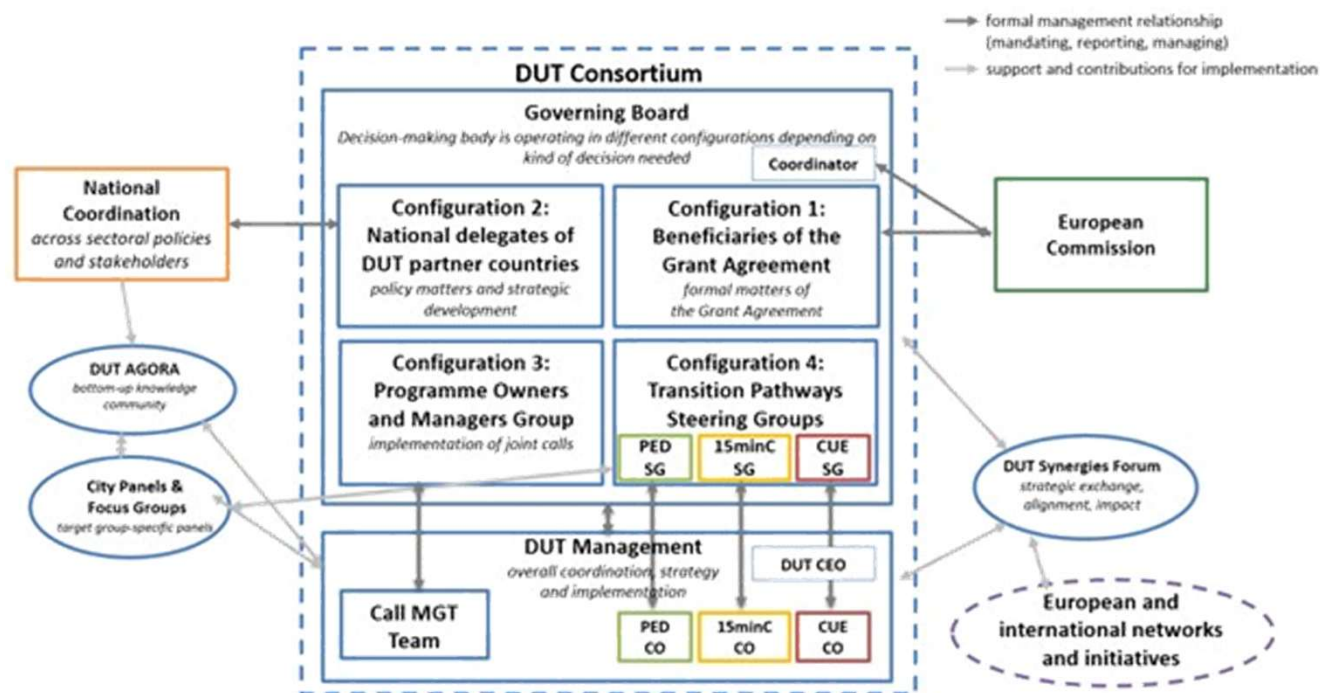
Observations: Tools and support found most relevant by community

Mostly asked for - Support for Partnerships:

- Governance:
 - Agreements (e.g. model consortium agreement for Cofunds)
 - Governance models
 - Monitoring and evaluation: RIPE toolkit (Monitoring and evaluation exercise)
- Implementing joint calls
 - Call manual

Governance models: Systematic overview on common governance functions in co-funded Partnerships

- Shows common structures of different Cofunds
- Includes examples of good practices



[How to get there](#)

Model consortium agreement for co-funded European Partnerships

Governance, Administration & Legal Base

Home / Support for Partnerships / Governance, Administration & Legal Base / Agreements

Agreements

The management of the partnership requires various agreements at different stages of its implementation, which allows for an appropriate way of working to achieve the objectives set. For each type of European Partnership, currently available information on needed agreements is summarised below. Furthermore, some draft examples of agreements are given through links under 'Related Files'.

Co-programmed Partnerships

Legal form: Contractual Arrangement / Memoranda of Understanding signed between representatives of the partners (typically the association(s) representing the private sector) and the Commission.

Who signs typically:

- For the European Commission: the Commissioner responsible;
- The partners: organised in one (or more) associations representing their members (industry, research organisations etc.);

Related Files



10/10/2023

Model Consortium Agreement for co-funded European Partnerships

In addition to the Grant Agreement it is compulsory for all beneficiaries to sign a Consortium Agreement.

More ... +

[Download](#)



[How to get there](#)



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the European Union

Joint Call Manual

Support for Partnerships

Home / Support for Partnerships / Implementing Joint Calls

Implementing Joint Calls



We have compiled the following guidelines to provide the Partnership community with a sound basis for the implementation of transnational calls for proposals. You will find general information, practical examples and templates.



- Call planning & preparation
- Submission
- Evaluation
- Funding of Projects
- After the Call

The linked documents may be used as blueprints, references or inspiration for future joint call activities. Materials provided here may be appropriate for various scenarios, including co-funded calls with EU funding.



[How to get there](#)



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Observations: Tools and support found most relevant by community

Mostly asked for - News and events

- One of most relevant ERA-LEARN activities to reach out and inform actors
- Stakeholder Forum and Newcomer Workshop are the most attractive event/ workshop
- Proceedings/ FAQs helpful for further support

News and Events

[Home](#) / [News and Events](#) / [Events](#)

Events

Filter

[ALL](#)

[ERA-LEARN](#)

[OTHER](#)

[UPCOMING](#)

[PAST](#)

Implementing co-funded European Partnership: a Training for Newcomers

29.09.2025

Date: 29/09/2025 - 30/09/2025

ERA-LEARN and the European Commission are organising a hybrid workshop on 29 and 30 September 2025 in Rome. The workshop will provide a comprehensive overview of co-funded European Partnerships. Plenary sessions, including presentations from the European Commission, ERA-LEARN and partnership representatives will be live-streamed. In-person group wo ...

[Read more](#)

Save the Date! European Partnership Stakeholder Forum 2025

03.12.2025

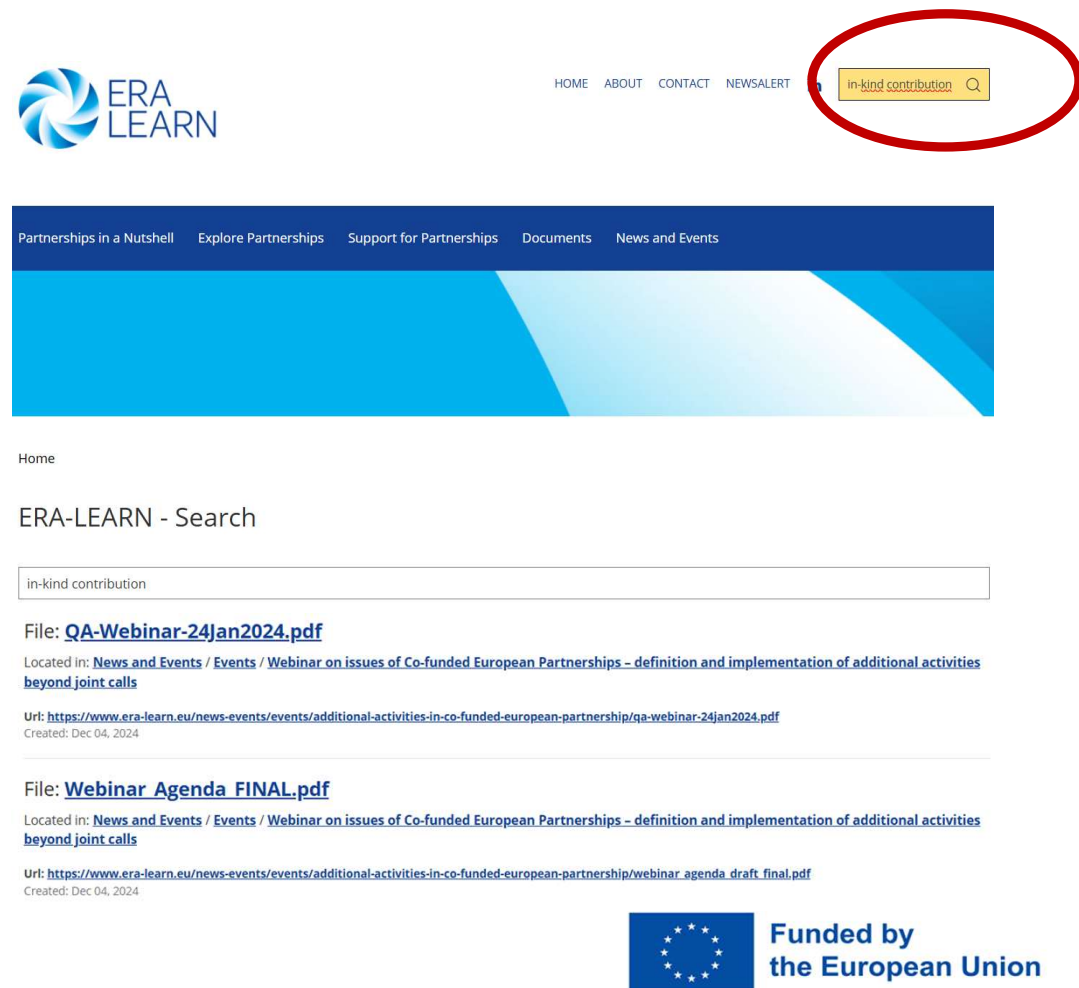
Date: 03/12/2025

ERA-LEARN and the European Commission are jointly organising the fourth European Partnership Stakeholder Forum, which will take place as a one-day event in Brussels on 3 December 2025.

[Read more](#)

Test the search function

- Btw: our search function can also guide you the way!



The screenshot shows the ERA-LEARN website. At the top right, a search bar with the text "in-kind contribution" and a magnifying glass icon is circled in red. Below the navigation bar, the main content area displays the search results for "in-kind contribution".

Home

ERA-LEARN - Search

in-kind contribution

File: [QA-Webinar-24Jan2024.pdf](#)

Located in: [News and Events](#) / [Events](#) / [Webinar on issues of Co-funded European Partnerships – definition and implementation of additional activities beyond joint calls](#)

Url: <https://www.era-learn.eu/news-events/events/additional-activities-in-co-funded-european-partnership/qa-webinar-24jan2024.pdf>


Created: Dec 04, 2024

File: [Webinar Agenda FINAL.pdf](#)

Located in: [News and Events](#) / [Events](#) / [Webinar on issues of Co-funded European Partnerships – definition and implementation of additional activities beyond joint calls](#)

Url: https://www.era-learn.eu/news-events/events/additional-activities-in-co-funded-european-partnership/webinar_agenda_draft_final.pdf

Created: Dec 04, 2024

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Thank you!

www.era-learn.eu



ERA-LEARN News alert: <https://www.era-learn.eu/newsletter>

 Follow us: <https://www.linkedin.com/company/era-learn/>

Co-funded European Partnerships – implementation



Dominika TRZASKA
Gianmaria MAULE
REA B.2

DISCLAIMER

The views and opinions expressed in this presentation are those of the Unit REA/B2 and do not necessarily reflect the official position of any other Responsible Authorising Officers for Co-funded partnership grants.

Approaches and interpretations may vary and it is encouraged to seek guidance directly from the Authorising Officer concerned.

This presentation is intended for informational purposes only and should not constitute legal advice.



Cluster 6 COFUND Partnerships

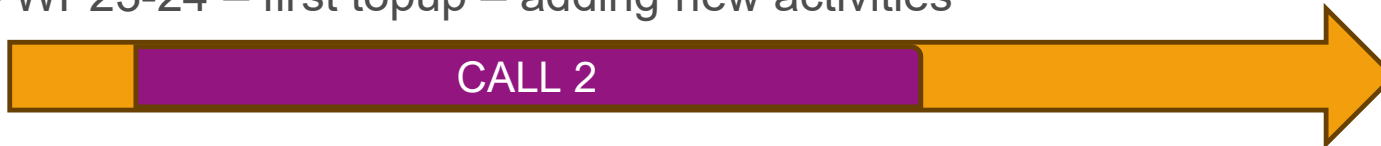
ACRONYM	Title	Initial funding WP	Status
BIODIVERSA	The European Biodiversity Partnership	2021	2 nd topup in WP 2025
Water4All	Water Security for the Planet (Water4All)	2021	2 nd topup in WP 2025
SBEP	A climate neutral, Sustainable and productive Blue Economy Partnership	2022	1 st topup in WP 2024
AGROECOLOGY	European partnership on accelerating farming systems transition – agroecology living labs and research infrastructures	2023	1 st topup in WP 2025
EUPAHW	European Partnership for Animal health and Welfare	2023	1 st topup in WP 2025
FutureFoodS	European partnership for a sustainable Future of Food Systems	2023	1 st topup in WP 2025
AgData	Agriculture of Data	2024	Topup expected in WP2026-27
TBD	European Partnership: Forests and Forestry for a Sustainable Future	2025	No topup

Topup logic

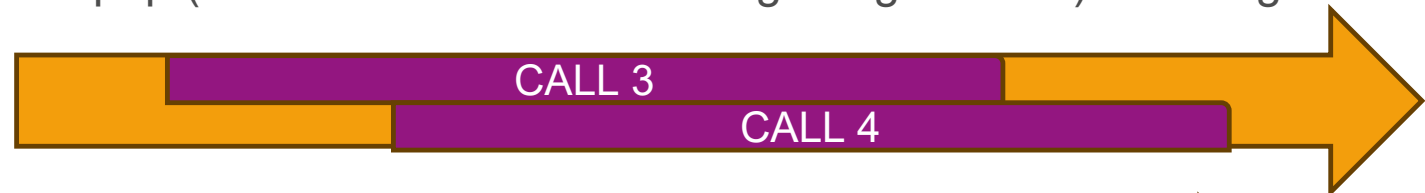
- Phase 1 – WP21-22 – initial grant



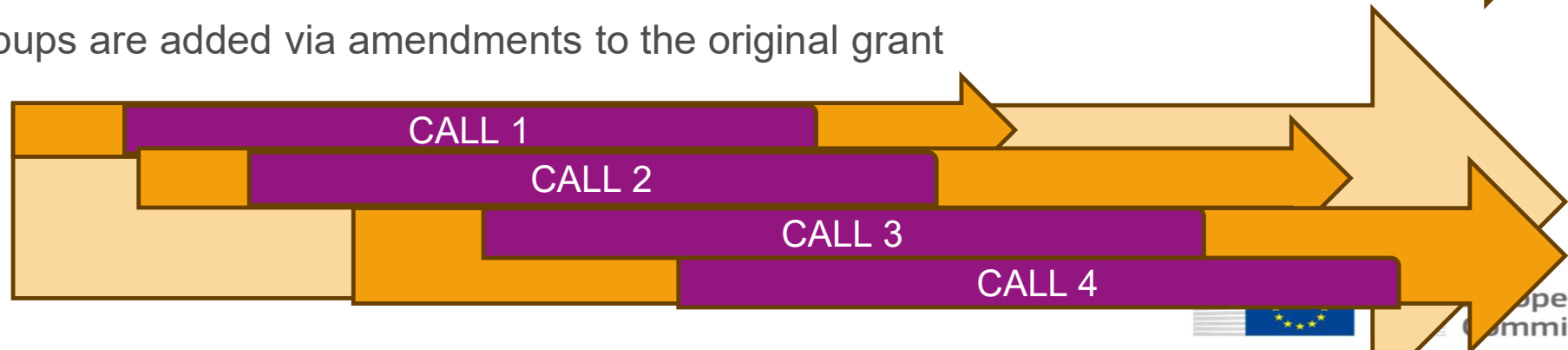
- Phase 2 – WP23-24 – first topup – adding new activities



- Phase 3 – WP25 – final topup (annual instalments covering budget 25-27) – adding new activities



- Topups are added via amendments to the original grant



Grant / Amendment Preparation Phase



Successful proposals enter into a Grant Agreement Preparation Phase (or for topup, Grant Amendment Preparation Phase), or GAP.

In general, HEU has a '**no-negotiation**' approach during GAP. Consortia should propose changes only in very exceptional / limited cases. This is without prejudice to changes required due to ethics or security review; changes to ensure conformity with applicable financial and legal rules (including the 'co-fund checklist' for Co-funded partnerships); corrections of clerical errors / clear inconsistencies; removal / change of participants for certain reasons.

For COFUNDs & top-ups certain exceptions to this approach apply:

- In exceptional cases the **evaluators of COFUND actions may formulate recommendations** to address shortcomings, which should be duly justified and appropriately documented and authorised.
- The granting authority may insist that **specific shortcomings identified in the ESR are corrected**.

For Grant Preparation Phase usual Time-to-Grant applies (8 months from call deadline)

Top-up Amendment Preparation Phase



CONSORTIUM / DOA

- **AT21** Change of Annex 1
- Other clauses as necessary



The new combined DoA should allow for **linking activities with the phase** (i.e. budget coming from specific WP)

FINANCIAL CHANGES

- **AT41** Change of Annex 2
- **AT43a** Change of the maximum grant amount (Annex 2)
- **AT43b** Change of maximum grant amount (award decision)*
- **AT55** Change of the prefinancing*
- **AT56** Change of the MIM Contribution*

* Activated by the EU officer

Guidance:

[Amendments - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#) (process overview)

[How to launch an amendment - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)

[Online Manual om_en.pdf \(europa.eu\)](#)

Use of unspent amounts from the specific phase – separate budgets



- Unused/unspent budget from activities covered by a specific phase (e.g. initial grant, first top-up), e.g. 21-22 WP award decision, **cannot** be freely applied to activities covered/described by or resulting from the topup amendment linked to another phase, e.g. 23-24 or 25 WP award decision.
- However: consortia could consider introducing **an amendment** to provide for Annex I activities to be covered by the 21-22 Work Programme award decision/existing grant agreement maximum grant amount – if this would not call into question the original award decision.
- As a best practice these amendments should be **consulted in advance** with the Project Officer.

Late association to the programme

– UK example



- UK association to HE since 1 January 2024 (i.e., entities established in the UK are eligible to receive funding as from 1 January 2024). It **only** applies for award procedures implementing 2024 budget and onwards.
- For co-funded partnerships which receive additional funding from the work programme 2023-2024 / 2025 / 2026-2027 → UK entities initially participating as Associated Partners are eligible to receive funding as Beneficiaries but only from 2024 (and later) budget. Therefore, **unspent budget** from 2021, 2022 and 2023 **cannot be used** in this respect. Change of status (AP -> Ben) also requires an amendment and is usually done with the topup amendment.
- The same approach applies for countries associating in 2025 → e.g. Swiss entities initially participating as APs are eligible to receive funding as beneficiaries but only from 2025 (and later) budget (they should be added in a topup as beneficiaries). Therefore, **unspent budget** from 2021, 2022, 2023 or 2024 **cannot be used**.



Cost eligibility

- **EU co-funding is at a constant rate defined in the work programme** (typically 30%) per grant agreement and is generated by eligible costs (no rate change with top-up possible)
- Each consortium **agrees internally on how the EU co-funding is best used / distributed**
- To create eligible costs for co-funding, the financial management of co-funded European Partnerships has to be in line with the **rules for financial management for any Horizon Europe action**



Costs: General eligibility conditions

Article 6 of the Grant Agreement refers to eligible and ineligible costs and contributions and the [Annotated Grant Agreement](#) provides extensive supporting information (p. 40 - 146).

Actual costs must:

- be **actually incurred** by the beneficiary
- be incurred during the **action duration**
- be declared under one of the **budget categories**
- be incurred **in connection with the action** (Annex 1) and **necessary** for its implementation
- be **identifiable and verifiable** → in particular **recorded** in the beneficiary's accounts in accordance with the accounting standards applicable in the country where the beneficiary is established and with the beneficiary's **usual cost accounting practices**
- comply with the **applicable national law** on taxes, labour and social security and
- be **reasonable, justified** and must comply with the principle of **sound financial management**, in particular regarding economy and efficiency



Cost eligibility

To be eligible, costs must be in line with the general (Art 6.1) and specific (Art. 6.2) eligibility conditions, and when relevant (e.g. **FSTP costs – Art. 6.2.D.1**), implemented in accordance with the conditions set out in Annex 1 (the Description of the Action).

At proposal stage, Partnerships should ensure that the **process for cascaded calls is well described and in line with the rules on FSTP** (Annex 5 Specific rules for Co-funded Partnerships AGA p. 416).

During implementation, the consortium should ensure that **cascaded calls are conducted in line with the general FSTP rules AND the specific conditions in their grant agreement.**

Any doubts on how cascaded calls are managed should be discussed in advance of implementation with the project officer to ensure that cost eligibility rules are respected.

Annual instalments



- Annual instalments are allowed whenever the WP foresees it (top-up call + budgetary forecast for coming years).
- Annual instalments **don't equal** annual payments.
- Cofund and cofund topup calls in Work programme 2025 with annual instalments use budget appropriations 2025, 2026, 2027 – this is the last phase (final budget of the partnership).



Financial flows

- **Pre-financing.** The amount is usually defined in accordance with the number of reporting periods. Contribution to the MIM (typically 5% of the maximum grant amount), retained from the prefinancing (modalities set out in the Data Sheet, see Point 4.2).
- **Additional pre-financing** payment (if foreseen). In case of additional pre-financing(s), at least 70% of the previous prefinancing must have been consumed (otherwise reduced accordingly).

Financial support to third parties (FSTP) — Where an action includes financial support to third parties (*e.g. in the form of grants*), the commitments entered into by the beneficiaries vis-à-vis their third parties receiving financial support can be included in the 'additional pre-financing report' for the purpose of calculating the 70% usage threshold, even if no payments have been made — provided it is the usual accounting practice of the beneficiaries to consider the corresponding amounts as committed/used and thus no longer available for other purposes.

- **Interim payment(s).** Submission of cost statements reporting all costs incurred. For affiliated entities, it is the beneficiary that completes the data and submits the financial statement for them. (capping at 90% of the max Grant amount)
- **Final payment.** MIM release

Certificate on the financial statements (CFS)



- This is a mandatory requirement when the beneficiary (or affiliated entity) reaches the threshold of requested **EU contribution to costs \geq EUR 430,000.00**
- Must be
 - drawn up using the template published on the Portal
 - cover the applicable cost categories set out in the template
 - declared and signed by an independent qualified external auditor (or independent public officer in case of public bodies)
- The CFS is due at final payment.

CoFund Partnerships art. 21 of the GA

Monitoring and reporting



- **Timing:**
 - Every 24 months or variable
 - Depending on the specificities and schedule of the action
 - Can be changed during the top-up amendment
 - Shift to annual installments **does not impact** the reporting calendar or payment schedule
- **Reviews:**
 - With reporting period
 - Not linked to the reporting period
- **Payment modalities:**
 - Prefinancing
 - Cost reimbursement

CoFund Partnerships art. 21 of the GA

Monitoring and reporting



Mandatory elements:

- Deliverables related to FSTP (call conditions, rank list of proposals, observer report)
- Annual expenditure deliverables (if RPs >18M)
- Data transfer deliverables / milestones
- Annual Work Plans

The consortium should ensure that **cascaded calls are conducted in line with the general FSTP rules AND the specific conditions in their grant agreement** (i.e. eligibility criteria).

The evaluation must use **the same award criteria as Horizon Europe calls**: Excellence, Impact, Quality and Efficiency of the Implementation.

The **budget cannot be moved between topups** (each workprogramme funds activities evaluated under this workprogramme).



Non-compliance with the mandatory rules and / or specific aspects of the grant agreement (inc. DoA) for a given partnership can lead to **cost rejections**.



Non-call / additional activities

- **Any activity that is distinct from and complements the financial support to third parties/external calls**, i.e. typically “in-house activities”. This can relate to e.g. the coordination and implementation of existing in-house activities, access to data and services, data collection and monitoring efforts, training programmes, awareness raising and communication events
- **No pre-defined ‘menu’ for additional activities** → activities must fit into the **eligible cost categories** listed in the MGA to be reimbursable (personnel costs, subcontracting costs, purchase costs, travel and subsistence, equipment,...)
 - The EU contribution is calculated based on **eligible, actually incurred** costs
- **Not to be confused with “in-kind contributions”** as defined in the [Financial Regulation](#)/the [Horizon Europe MGA](#)

Ethics



Article 19 - Regulation (EU) 2021/695 establishing Horizon Europe Article 14 of the HE Grant Agreement

All actions must comply with Ethical principles, EU national and international law, Charter of Fundamental rights and EU convention on Human Rights

- **Obligations of participants:**
 - Provide an ethics self-assessment
 - Confirm adherence to European Code of Conduct for Research Integrity
 - Ensure activities abroad would be allowed in at least one MS concerned
 - Provide licensing/approvals and measures from MS for hESC
- **Ethics compliance**
 - Systematic screening of proposals and assessment of proposals with serious and complex issues by the Commission or delegated Funding body with support of ethics experts
 - Proposals with hESC must undergo assessment
 - Participants must obtain mandatory approvals before starting the relevant activity
 - Ethics checks by Commission/funding body (with ethics experts)
 - Non-compliant actions → **rejected or terminated**

Ethics



Article 13 (Security) and 14 (Ethics) apply to recipients of FSTP (Article 9.4 of the GA).

The beneficiaries must ensure that:

- **FSTP recipients respect their obligations**
- FSTP schemes are properly managed and monitored in line with EU grant agreement.
- they keep full documentation (financial & technical) relevant to FSTP.
- they can demonstrate **compliance** of FSTP activities during checks, reviews, audits, or investigations.
- They have in place mechanisms for the **screening & monitoring** of FSTP actions;
- They timely inform the Agency of activities needing ethics **assessment**; they don't provide FSTP in proposals that include **prohibited activities**.
- they handle issues at cascade level.




Non-compliance of FSTP actions may lead to **ineligible costs** or **EU grant reduction**.

It is **strongly recommended** to appoint an **ethics board** to:

- Assist the consortium in setting robust ethics review mechanisms for proposals (screening/assessment) and ongoing projects (monitoring/reviews/checks)
- Assist and guide the consortium in understanding the full extent of the ethics issues raised by the internal project activities (where applicable) and in appropriately addressing them

Further guidance



- [ERA-LEARN](#)
- [Horizon Europe National Contact Points \(NCPs\)](#)
- [Good practices for implementing FSTP in EU grants](#)
- [Research Enquiry Service](#)
- Resources:
 - [Horizon Europe Annotated Grant Agreement](#) (AGA) 
 - [Horizon Europe Programme Guide](#)
 - Topic text and specific conditions for *your* Partnership!

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#ZeroPollution
#CCRI
#EUForest
#EUMissions, #MissionSoil #MissionOcean
#MissionClimate #MissionCities





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Internal financial arrangements

Roland Brandenburg (ERA-LEARN)



- Co-funded Partnerships implement a **joint work programme** agreed between the EC and the consortium which defines the planned activities
- Co-funded Partnerships receive **EU co-funding at a funding rate defined in the Grant Agreement** (typically 30%)
- the EU contribution is **generated by eligible costs** applying the **same cost categories as any other Horizon Europe action**
- Co-funded Partnerships **usually** implement **two types of activities** which generate eligible costs:
 - **calls for proposals** (with Financial Support to Third Parties)
 - **additional activities** (any activity that is distinct from the financial support to third parties (“joint calls”); with personnel costs, other costs etc.)
- **eligible costs have to be actually reported costs; estimated costs are not eligible.**
- EU co-funding is transferred from the EC to the coordinator, and then **distributed among the consortium members**
- the **distribution** of the EU contribution is **defined in the Consortium Agreement**

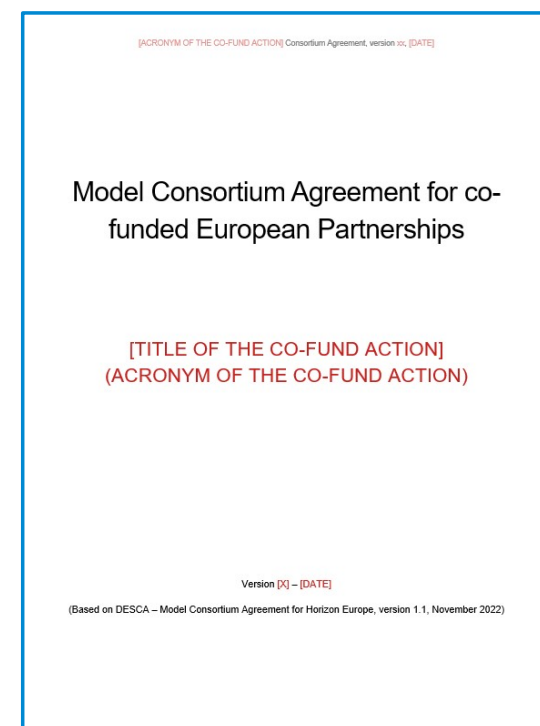
- in the **Consortium Agreement** the consortium may define an **internal flexibility of funding rates** which deviates from the strict Horizon Europe funding rate and distribution, **depending on their respective needs**
- **Why: different types of activities** may benefit from different **funding rates**
 - coordination activities or activities carried out for the benefit of the whole partnership could receive a **higher funding rate** to cover e.g. personnel costs or higher costs of core partners
 - selection lists of joint calls could benefit from a **flexible distribution of EU co-funding to balance the requested funding and available national funding** to avoid gaps in the selection list; parts of the EU financial contribution could be used to **fill such gaps**
- **How:**
 - **higher (>30%) internal funding rates** e.g. 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 the funding of trans-national research projects (cost category D1). This requires increased national contributions to still receive the EC contribution foreseen in the GA

ERA-LEARN: Model Consortium Agreement for Co-funded Partnerships

ERA-LEARN provides a Model Consortium Agreement:

https://www.era-learn.eu/documents/modelca_co-funded_eps.docx

- Based on DESCA – Model Consortium Agreement for Horizon Europe, version 1.1, November 2022 (to be consulted)
- adaptations according to the co-fund needs, in particular:
 - Section 1 (Definitions)
 - Section 6 (Governance structure)
 - Section 7 (Financial provisions)
 - Section 8 (Call implementation) (new)
 - Section 9 (Results)
 - Section 10 (Access Rights)
 - Section 12 (Data Management) (new)
 - paragraph 13.8 (Settlement of disputes)
- based on examples of European Partnership Consortium Agreements



Model Consortium Agreement: financial provisions

ERA-LEARN suggests using a **model for the distribution of EU co-funding** based on the **following principles**:

- **keep it as simple** as possible
- design the internal reporting along the lines of the reporting to the EC (e.g. cost categories, eligible costs)
- consider **adapting internal funding rates**
 - for different **cost categories** – e.g. lower funding rate for cost category D1 (→ increased national/regional contributions)
 - for different **work packages/types of activity** if suitable
- **foresee a reserve fund to be able to cover unexpected situations**, e.g. by setting aside the EU funding related to indirect costs
- agree which **core activities** are essential for the implementation of the Co-Fund Action to **prioritise** the distribution of the EU co-funding

3 cases (examples)

Example 1: different funding rates for different cost categories

Example 2: different funding rates in Joint Calls for different beneficiaries

Example 3: merge both approaches - internal flexibility on cost categories & share of FSTP

Example 1: different funding rates for different cost categories

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scenario 1: 30% funding rate (EU contribution) in all cost categories

EU contribution - Calculation	Costs	EU Contribution 30% of costs	Other Contribution 70% of costs
Personnel costs	13 195 000	3 958 500	9 236 500
Sub-contracting costs	7 199 000	2 159 700	5 039 300
Purchase costs	10 519 000	3 155 700	7 363 300
Financial support to third parties	95 368 000	28 610 400	66 757 600
Indirect costs	5 928 500	1 778 550	4 149 950
Total	132 209 500	39 662 850	92 546 650

scenario 2: 100% funding rate (EU contribution) in all cost categories except FSTP and indirect costs, lower funding rate for FSTP and indirect costs
→ national contributions to FSTP need to be increased!

EU Contribution - Distribution	Costs	EU Contribution - Use	Other Contribution
Personnel costs	13 195 000	13 195 000	-
Sub-contracting costs	7 199 000	7 199 000	-
Purchase costs	10 519 000	10 519 000	-
Financial support to third parties	95 368 000	8 749 850	86 618 150
Indirect costs	5 928 500	-	5 928 500
Total	132 209 500	39 662 850	92 546 650

Example 1: lower funding rate for FSTP → higher national contributions needed

Page 48

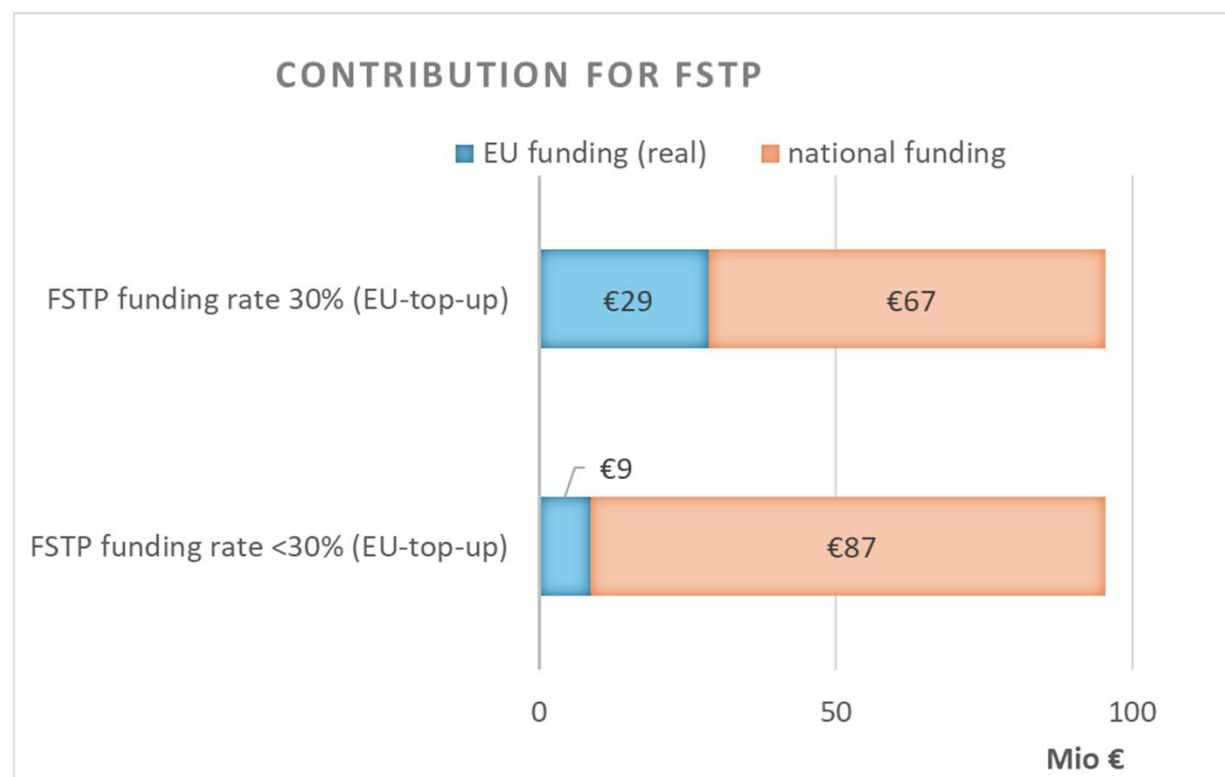
Comparison:

scenario 1:

funding rate 30% (EU funding)
→ 66.8 Mio € national
contribution needed

scenario 2:

lower funding rate (<30% EU
funding) → 86.6 Mio € national
contribution needed



Note: the overall reported costs must be identical in both scenarios (95.3 Mio €) to receive the same EU contribution.

Example 1: funding loss due to reduced reported costs (FSTP)

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Attention:

do not mix up the 2 scenarios !
do not report the **committed** national contributions (66.7 Mio €) and the **real shared** EU contribution (8.7 Mio €) to FSTP
→ this would result in lower reported costs (75.5 Mio €) and thus in less EU funding (-6 Mio €)

The overall reported costs must be independent of the applied internal funding rate to avoid a loss in EU funding.



in - Calculation	Costs	EU Contribution 30% of costs	Other Contribution 70% of costs
Personnel costs	13 195 000	3 958 500	9 236 500
Sub-contracting costs	7 199 000	2 159 700	5 039 300
Purchase costs	10 519 000	3 155 700	7 363 300
Financial support to third parties	95 368 000	28 610 400	66 757 600
Indirect costs	5 928 500	1 778 550	4 149 950
Total	132 209 500	39 662 850	92 546 650
in - Distribution	Costs	EU Contribution	
Personnel costs	13 195 000	3 958 500	
Sub-contracting costs	7 199 000	2 159 700	
Purchase costs	10 519 000	3 155 700	
Financial support to third parties	75 507 450	22 652 235	
Indirect costs	5 928 500	1 778 550	
Total	112 348 950	33 704 685	
	Less funding	5 958 165	



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Process:

- before a joint call is launched **preliminary individual national commitments** are collected without knowing the actual demand
- after full proposal evaluation, when compiling the selection list, some of the national commitments may appear to be **insufficient to match the actual demand** → individual budget **increases may be needed**
- whenever the national contribution cannot be increased there will be a **funding gap** in the list
- to fill funding gaps in the joint selection list a part of the expected EU funding is typically **distributed among participating funders according to real needs** → this will **extend the funding list** and result in a larger number of funded projects; this will also result in different funding rates for different beneficiaries

Example 2: financial flexibility suggested through mixed funding mode

- exhausted national budgets cause funding gaps in the selection list → distribute EU contribution according to needs to avoid such gaps

Nr	proposal ID	Proposal acronym	requested funding	Evaluation score	EC top-up needed to fill gap	Agency 1	Agency 2	Agency 3	Agency 4	Agency 5	Agency 6	Agency 7
1	A1	Test Project	838394	13,5	0	0	0	0	0	0	0	0
2	A2	Test Project	660000	13,5	0	0	0	0	0	0	0	0
3	A3	Test Project	645000	13,5	0	0	0	0	0	0	0	0
4	A4	Test Project	1520920	13	-973 064	0	-203 544	0	0	0	0	-769 520
5	A5	Test Project	377125	13	-973 064	0	-203 544	0	0	0	0	-769 520
6	A6	Test Project	648500	13	-973 064	0	-203 544	0	0	0	0	-769 520
7	A7	Test Project	376762	13	-973 064	0	-203 544	0	0	0	0	-769 520
8	A8	Test Project	515428	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
9	A9	Test Project	900000	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
10	A10	Test Project	1158765	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
11	A11	Test Project	571500	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
12	A12	Test Project	515000	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
13	A13	Test Project	337313	12,5	-973 064	0	-203 544	0	0	0	0	-769 520
14	A14	Test Project	1162000	12,5	-1084 832	0	-203 544	0	0	0	0	-769 520
15	A15	Test Project	575430	12,5	-1084 832	0	-203 544	0	0	0	0	-769 520
16	A16	Test Project	694969	12,5	-1084 832	0	-203 544	0	0	0	0	-769 520
17	A17	Test Project	611800	12,5	-1084 832	0	-203 544	0	0	0	0	-769 520
18	A18	Test Project	462969	12,5	-124 790	0	-203 544	0	0	-163 094	0	-769 520
19	A19	Test Project	331172	12,5	-1379 964	0	-203 544	0	0	-163 094	0	-769 520



without flexible distribution of EU funding only 3 projects could be funded



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Example 2: practical example – extending the selection list though flexible gap filling

1. Consortium Agreement defines a **possible range** of EU contribution to be used for gap filling
2. the **final rate** is decided when the actual ranking list is available and **gaps are identified**
3. **simulate different scenarios** to identify best percentage according to committed national funding and ranking –extend the selection list & maximise the spending of national budgets

Example 2: flexible distribution of EC contribution – variety of actual funding rates for FSTP

- the consortium can agree to use a **mixed-mode funding approach** → **dynamic allocation of the EC contribution according to needs** –gaps in the selection list can be avoided

Practical example:

beneficiary	funding requested by selected research groups	EC funding rate	EC contribution	available national funding	internally agreed allocation of EC contribution (example)	resulting internally agreed funding rate
ben. A	€ 500.000	30%	€ 150.000	€ 200.000	€ 300.000	60%
ben. B	€ 500.000	30%	€ 150.000	€ 800.000	€ 75.000	15%
ben. C	€ 500.000	30%	€ 150.000	€ 300.000	€ 200.000	40%
ben. D	€ 500.000	30%	€ 150.000	€ 400.000	€ 100.000	20%
ben. E	€ 500.000	30%	€ 150.000	€ 500.000	€ 75.000	15%
Total	€ 2.500.000	30%	€ 750.000	€ 2.200.000	€ 750.000	30%

- agreement on different funding rates per cost category may result in different internal funding rates
 - flexible filling of funding gaps in joint calls may result in different internal funding rates
- applying both approaches will result in **different internal funding rates for each beneficiary**

Example 3: reported costs and distribution of EU contribution

Costs reported to EC												
Beneficiary	A. Personnel costs (€)	B. Sub-contracting costs (€)	C. Purchase costs			D.1 FSTP (€)	E. Indirect costs (€)	total eligible costs (€)	maximum EU contribution (€)	official EU funding rate %	Other/own contribution (€)	Other/own contribution (%)
			C. 1 Travel and subsistence (€)	C. 2 Equipment (€)	C.3 Other goods...(€)							
Ben. 1	830 000	8 000 000	40 000	500 000	500 000		467 500	10 337 500	3 101 250	30%	7 236 250	70%
Ben. 2	2 000 000	1 000 000	20 000	20 000		12 000 000	510 000	15 550 000	4 665 000	30%	10 885 000	70%
Ben. 3	130 000		40 000				42 500	212 500	63 750	30%	148 750	70%
...	15 401 000	-	1 122 500		2 100 000	232 800 000	4 655 875	256 079 375	76 823 813	30%	179 255 563	70%
Total	18 361 000	9 000 000	1 222 500	520 000	2 600 000	244 800 000	5 675 875	282 179 375	84 653 813	30%	197 525 563	70%
Real use of EU contribution based on internal agreements												
Beneficiary	EU contribution to personnel costs (€)	contribution to sub-contracting costs (€)	EU contribution to			EU contribution to FSTP (€)	EU contribution to Indirect costs (€)	reserve fund (€)	total internally agreed EU contribution (€)	real EU funding rate (%)	Other/own contribution (€)	Other/own contribution (%)
			Travel and subsistence (€)	Equipment (€)	Other goods...(€)							
Ben. 1	830 000	8 000 000	40 000	500 000	500 000				9 870 000	95%	467 500	5%
Ben. 2	2 000 000	1 000 000	20 000	20 000		3 000 000			6 040 000	39%	9 510 000	61%
Ben. 3	130 000		40 000						170 000	80%	42 500	20%
...	15 401 000	-	1 122 500		2 100 000	48 247 550			66 871 050	26%	189 208 325	74%
Total	18 361 000	9 000 000	1 222 500	520 000	2 600 000	51 247 550		1 702 763	84 653 813	30%	197 525 563	70%
internal EU funding rate per cost category	100%	100%	100%	100%	100%	21%	0%					



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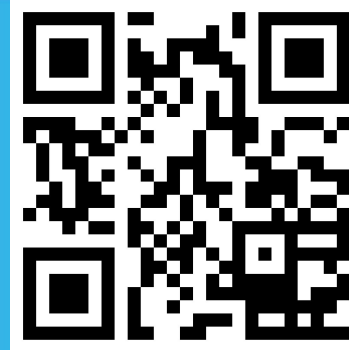
Lessons learned

- all beneficiaries must be **familiar with Horizon Europe reporting rules** (e.g. time sheets for personnel costs, ...) , especially newcomers!
- all costs must be **eligible and correctly reported** in the EU portal
- any internal rules should be as **simple as possible** and **clearly described** in the Consortium Agreement
- any internal rules should fit the **scope and activities** of the particular Partnership
- costs reported under category D1 are the **total amounts transferred** to the selected transnational projects
- a **mixed funding mode** is recommended for joint calls to cover funding gaps - avoid agencies running out of money and blocking the ranking list, avoid a reduced EC contribution
- consortia should **monitor closely** their actual costs to see early if a detrimental situation appears
- foresee a reserve fund for **unexpected situations**



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Thank you!



Further information:

www.era-learn.eu

Support & guidance: <https://www.era-learn.eu/support-for-partnerships>

Events: <https://www.era-learn.eu/news-events/events>



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AGROECOLOGY – How do we finance our Partnership?

ERA-LEARN Newcomer Workshop, 30 September 2025, Nicolas
Tippin



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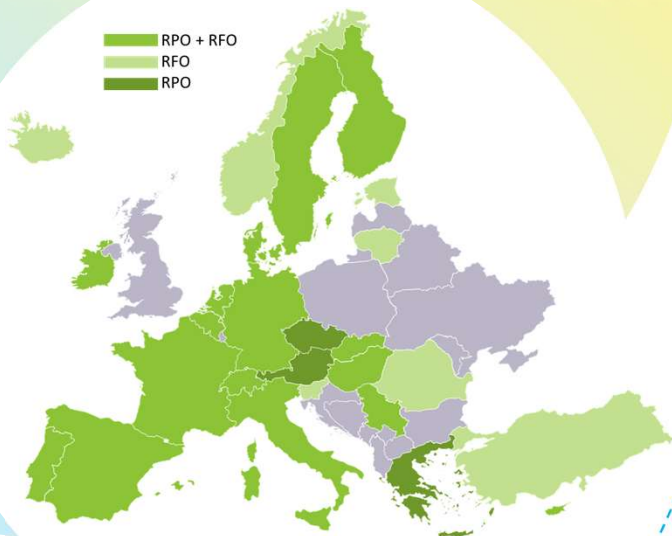
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Team-up and unlock the transition to agroecology so that farming systems are resilient, productive and prosperous, place-sensitive, as well as climate, environment, ecosystem, biodiversity and people-friendly by 2050



AGROECOLOGY in a nutshell



Jan 2024 to Dec 2030 *+ Phase 2*

Horizon Europe co-funded partnership in Cluster 6 (Food, Bioeconomy, Natural Resources, Agriculture and Environment)

Pool resources of EU and states/regions



Mobilisation of 120 Mio €

(50% co-funded; 60 Mio € EU)

In-kind: research and networking activities

In-cash: up to 3 (7) transnational calls for proposals

72 partners from 26 states/regions



RFOs: National/Regional Authorities, ministries, Funding agencies

RPOs: Research performing organisations



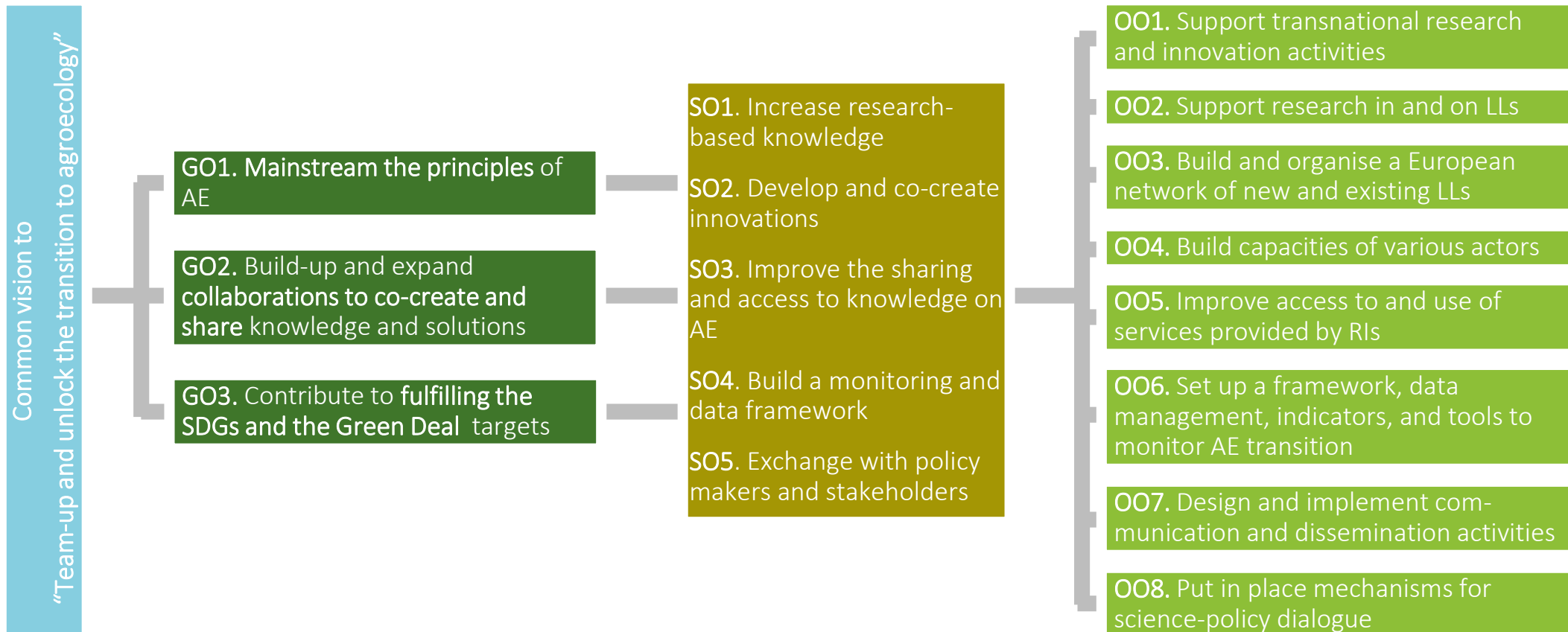
Visit us: <https://www.agroecologypartnership.eu/>

Coordination: Project Management Jülich (JÜLICH, DE)

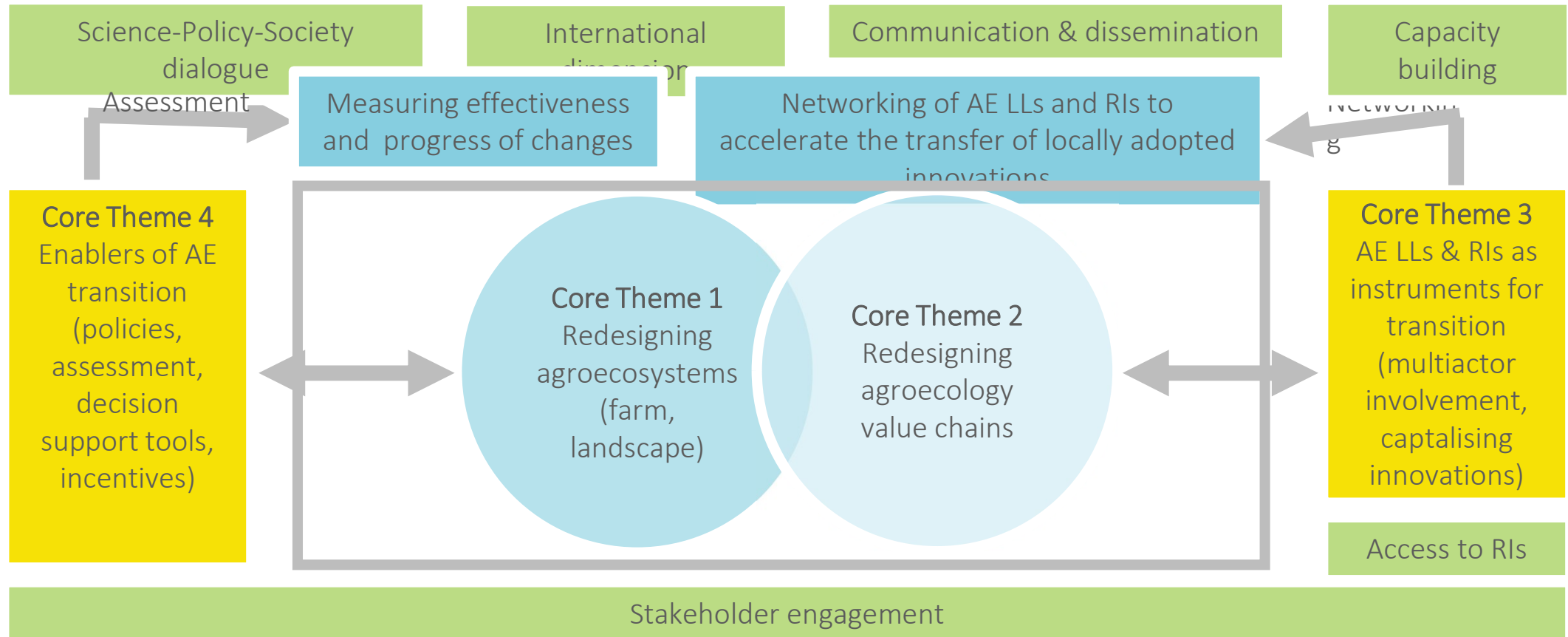
ptj-agroecology-secretariat@fz-juelich.de

Co-coordination: French National Research Agency (ANR, FR)

Intervention logic



SRIA & Core Themes





1st co-funded call (closed)



Set up

Two-step procedure (Feb – Sep 2024)
35 Funding agencies from 22 countries and regions



Fostering agroecology at farm and landscape levels

Theme 1: Focus on the farm level and its immediate surroundings.

Theme 2: Explore agroecology at the landscape or territorial level.



89 pre proposals and 38 invited full proposals

Peer review by an International Expert Panel



19 projects selected

37 Mio € committed funding
188 partners from 22 countries and regions

<https://www.agroecologypartnership.eu/funded-projects>





2nd co-funded call (open)



Timeline

Pre proposal submission deadline: 17 Feb 2025, 2 pm CET

Full proposal submission deadline: 09 July 2025, 2 pm CEST

29 Funding agencies from 20 countries and regions



Integrating environmental, economic and social perspectives in assessing the performance of agroecology. Value-chain and policy implications

Topic 1: Determine and assess benefits/impacts and trade-offs of agroecology, and identify best practices

Topic 2: Transform value chains, business models and policies to facilitate the transition to agroecology



<https://agroecology.ptj.de/call2>

Call office: ptj-agroecology-call-office@fz-juelich.de

Partnering tool: <https://agroecology.ptj.de/partnering>





GA/CA

Grant Agreement (GA)

- between Beneficiaries and EC
- contractual object:
 - fulfilment of proposal
 - legal aspects to fulfil the tasks
 - payment and reporting modalities EC to Beneficiaries
- One single funding rate (30% or 50%) applied to all cost categories and all Beneficiaries

Consortium Agreement

- between Beneficiaries incl. Associated Partners (AP) ? Parties
- contractual object:
 - internal arrangements, e.g. financial distribution, meetings, ...
 - DESCA model as template
- Possibility to apply different funding rates:
 - **internal reimbursement rates (IRR)**

N.B.: different scenario for each Partnership (here our example)



source: Adobe stock





Setting the scene

8 Work Packages (in-kind)

- „Usual“ administration of Partnership + substantial amount of support R&I (e.g. monitoring of AE, capacity building, exploitation, science-policy, network...)
- Each 1 Leader + 1 Deputy
- Task leaders
- Personnel (A), Subcontracting (B), Purchase (C), Internally invoiced goods & services (D2) + 25% indirect costs (E)

Co-funded calls (in cash)

- Financial support to third parties (FSTP, D1)
- Based on own contribution (national/regional funders' money) + *EU top-up*
- Most unpredictable cost category (depends on scope, success rates of applicants from each country, real availability of funds...)



source: Adobe stock



Why do we use IRR?

Because we may!

- CA including how to use EU funding is an internal matter of the consortium

Because we have to

- Some costs are hardly covered, even partly, by own contribution: e.g. website of the Partnership, expert fees in calls, travel costs...
- Internal (in kind) activities reimbursed 50% are not as attractive as R&I projects from calls (often 100%)
 - Why should I engage personnel (limited) and e.g. 50% of workshop costs in internal activity when I get it paid 100% in an R&I project?

Because we should

- Past co-funds: funding rate was 33% (IRR applied <30%)
- Optimise Funders own budget use in calls:
 - If I have 1 Mio. € and fund projects for 1,5 Mio. €, I do not need (want) 50% back but only 500k€

source: Adobe stock



Budget as submitted

Category	Costs (m€)	Cofund (m€)
Personnel	29.48	14.74
Subc.	0.25	0.125
T&S	2.44	1.22
Equip.	0.25	0.125
Other G, W & S	3.35	1.675
Intern. invoice	0.10	0.05
Indirect	8.88	4.44

WPs

in cash

07.10.2
025

Name der Präsentation / Referent, Geschäftsbereich

source: Adobe stock



Scenario 1 – 50 Co-fund over all cost categories as defined in Grant Agreement (GA)

Category	Costs (m€)	Cofund (m€)
Personnel	29.48	14.74
Subc.	0.25	0.125
T&S	2.44	1.22
Equip.	0.25	0.125
Other G, W & S	3.35	1.675
Intern. invoice	0.10	0.05
Indirect	8.88	4.44
FSTP	75.22	37.61
Total	120.00	60

Pros	Cons
<ul style="list-style-type: none">+ Easy to manage+ 100 % fair to all partners+ Not risks in terms of not keeping any promises in terms of reimbursement rates as in cash and in kind is independent	<ul style="list-style-type: none">- 50% co-fund not satisfying for some partners because some cost types, e.g. subcontracting is hard to co-fund- Imbalance between partners as some have a high burden in administrative tasks (e.g. WP lead)

source: Adobe stock

07.10.2
025

Name der Präsentation / Referent, Geschäftsbereich

68



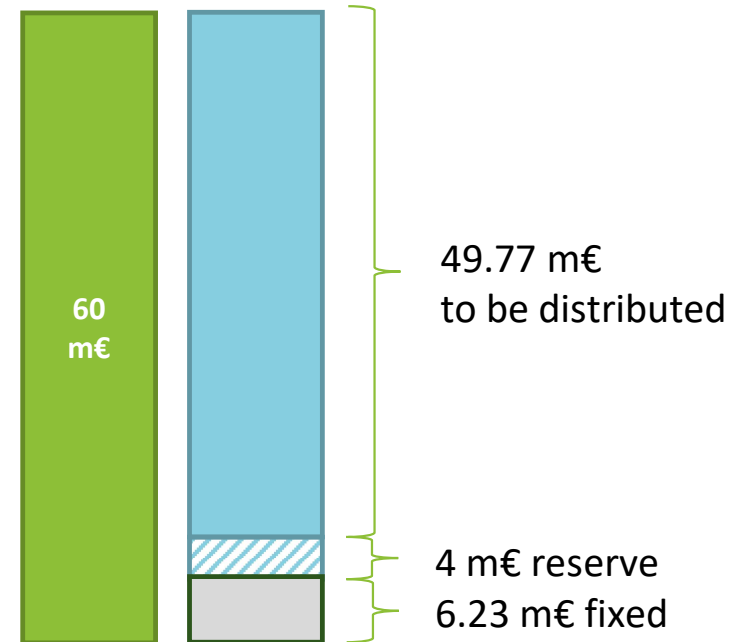
Risks & needs, part I

Needs

Subcontracting and Purchase costs: almost nobody can co-funded → 100% reimbursement needed (approx. 6.23 m€)

Risks

FSTP from funders is THE main cost generating EU money; risk that calls do not perform as originally budgeted is too impacting -> reserve of 4 m€ to put aside (6,67%)





Scenario 2 – Different rates per cost category and Single rates for PErsonnel

Category	Costs (m€)	*Rates
Personnel	29.48	60+%
Subc.	0.25	100 %
T&S	2.44	100 %
Equip.	0.25	100 %
Other G, W & S	3.35	100 %
Intern. invoice	0.10	60+%
Indirect	8.88	60+%
FSTP	75.22	33...28 %
Total	120.00	

source: Adobe stock

Pros	Cons
<ul style="list-style-type: none">+ Critical cost categories reimbursed 100 %+ Easy to manage+ Fair to all partners in terms of cost categories+ Better PM co-fund ratio (60+%)	<ul style="list-style-type: none">- Imbalance between partners as some have a higher burden in administrative tasks (WP leads)- WP-costs is dependent on in cash!

*defined in CA



Risks & needs, part II

Needs

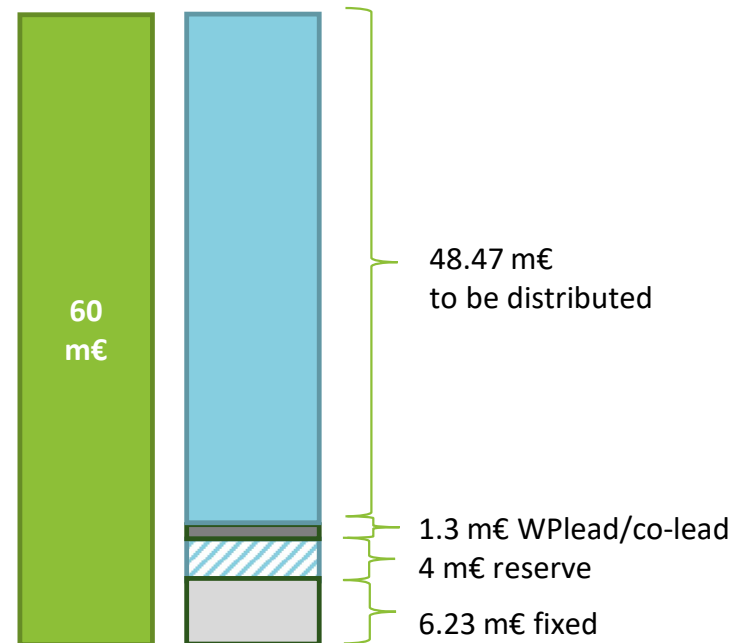
Subcontracting and Purchase costs: almost nobody can co-funded → **100% reimbursement needed (approx. 6.23 m€)**

Keep Executive Team (ET) active in management: 100% 2PM/Y for WP-Lead, 1PM/Y for WP-Deputy Lead (approx. 1.3m€)

Risks

FSTP from funders is THE main cost generating EU money; risk that calls do not perform as originally budgeted is too impacting -> **reserve of 4 m€ to put aside (6,67%)**

source: Adobe stock



Name der Präsentation / Referent, Geschäftsbereich

71



Scenario 4 – Single rates per cost category and WP/task and Bonus for WP leads

Category	Costs (m€)	*rates	Pros	Cons
Personnel	28.35 **1.30	60+% 100 %	<ul style="list-style-type: none">+ Critical cost categories reimbursed 100 %+ Easy to manage+ Fair to all partners in terms of cost categories+ Bonus for WP leads having a high administrative burden on WP management+ Better PM co-fund ratio (60+%)	<ul style="list-style-type: none">- WPs dependent on in cash
Subc.	0.25	100 %		
T&S	2.44	100 %		
Equip.	0.25	100 %		
Other G, W & S	3.35	100 %		
Intern. invoice	0.10	60+%		
Indirect	8.88	60+%		
FSTP	75.22	33...28 %		
Total	120.00			

*defined in CA; ** 2 PM/Y Wp lead 1PM/Y Deputy

source: Adobe stock



Summary

100% IRR for

- Subcontracting
- Purchase costs
- 2 PM p.a. for WP Lead and 1 PM p.a. for Deputy

60% IRR for

- Personnel costs
 - Use of own resources (e.g. institutionally funded researchers) to cover the rest
- Indirect costs (on all direct costs)
 - As in H2020, indirect costs were not those of organisation (rule HEUR 25% direct costs)

Max. 25 Mio. € left for calls

- Impossible to predict precise IRR as it depends on call success: the more projects funded, the lower the IRR
- Eventually less (in cash flow lower than planned) -> rest goes to a pot with the reserve

Reserve left used for personnel >60%

source: Adobe stock

Scenario to be monitored and, if necessary adapted (e.g. every 2 years)



THANK YOU!

Contact

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ptj-agroecology-secretariat@fz-juelich.de

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30 September 2025

Monitoring Obligations and Legal Basis

The Horizon Europe Regulation sets out a robust legal framework to ensure the **continuous, structured, and transparent monitoring** of the programme's implementation, including for European Partnerships.

- **Article 50** of the Regulation (EU) 2021/695 mandates the Commission to **systematically monitor implementation**, covering inputs, outputs, and impacts. It also requires that related data be made **publicly accessible via a single EU database**, supporting transparency and evidence-based oversight.
- **Annex III** establishes **specific monitoring and reporting obligations for European Partnerships**, ensuring that data is **comparable, timely, and aligned** with programme-wide requirements.
- **Annex V** establishes **Key Impact Pathways (KIPs)** framework for structuring and assessing the program's overall impact across scientific, economic, and societal dimensions.

Objectives:

- To ensure **transparency, accountability, and evidence-based policy-making**.
- To enable aggregated reporting across all instruments, including Partnerships (fully embedded in the corporate performance framework).



Previous Limitations in Data Collection and Reporting

Several challenges currently affect the capacity to gather complete and reliable data:

- A number of Partnerships do **not currently use eGrants**, the corporate reporting tool for Grants.
- There is **no centralised mechanism** for collecting data on **Cascade Funding** (also known as Financial Support to Third Parties, **FSTP**) --> **data is not directly integrated** into the eGrants Data and Results warehouse.
- **Lack of structured access to project-level outputs** (e.g. publications, patents, innovations), limiting the Commission's ability to assess the tangible impact of funded activities.

Outcome:

- Dispersed and uncoordinated data flows.
- Incomplete or inconsistent reporting across Partnerships.
- Obstacles to producing comprehensive programme-level analyses.



Structured XML-Based Templates

DG RTD has developed **structured templates** (based on XML technology) which are designed to capture data in a consistent, machine-readable format, enabling harmonised reporting across all European Partnerships and ensuring alignment with the corporate-level monitoring framework.

Key Advantages of the Template-Based Approach:

- ✓ **Legal Compliance:** Supports fulfilment of reporting obligations.
- ✓ **Harmonisation:** machine-readable, standardised format that ensures interoperability across systems and facilitates the consistent collection of data across Partnerships, enhancing transparency.
- ✓ **System Integration:** Enables alignment with the Commission's data architecture and analytics infrastructure, including integration into the eGrants Data and Results warehouse ensuring that Partnership results are fully visible within programme-level reporting.
- ✓ **Synchronisation:** dynamically update the information if the project parameters change (budget, termination, change of beneficiary etc), to ensure the information in the data bases is kept up to date.
- ✓ **Evidence-Based Policy Support:** Lays the foundation for data-driven evaluations, strategic planning, and timely feedback to policy, thereby reinforcing the credibility and relevance of HE implementation assessments.

Structured Data = smarter monitoring, deeper analysis, and stronger accountability.



Structured XML-Based Templates

Two templates have been shared to date, each aligned with key phases of the project lifecycle (September 2023)

 **Proposal Template** designed to capture structured data **at the proposal stage**, including key data as:

- General project metadata (title, acronym, duration, etc.).
- Applicant profiles and organisational types.

 **Funded Project Template** focused on **implementation monitoring**, including key data as:

- Grant agreement and consortium information.
- Funding allocation (including cascade funding, where applicable).

 **Supporting Material** (available on ERA-LEARN website)

[Template Submission and Integration of Partnerships Data](#): describes the reception mechanism and further steps for the onboarding of the data to be provided by the co-funded and institutionalized partnerships to RTD.

Results Templates: Introduction to the New Template

Third structured template is currently under development. This new Results Template is designed to systematically collect information on **project-level outputs, outcomes, and impact**.

As with the project and proposal templates, the **results template** is also aligned with the data requirements defined in the official Horizon Europe [periodic reporting template](#).

Key Data Elements Include (among others):

- Publications.
- Datasets.
- IPRs.
- Dissemination and Communications activities.
- Researchers involved in the project.

Why It Matters:

- **Impacts:** enabled by the outcomes of the project.
- **Policy Contributions:** input to EU and national policymaking and regulatory processes.
- **Innovation Maturity:** tracking of Technology Readiness Level (TRL) progression and market deployment potential.



Results Templates: Sample of Structure

C	D	E	F
Section Name <input type="text"/>	Element Name BO <input type="text"/>	Set of Values constraints <input type="text"/>	MANDATORY <input type="text"/> FIELDS
Researchers involved in the project	Beneficiary No	<i>Example</i>	Y
Researchers involved in the project	Pic		Y
Researchers involved in the project	First Name		Y
Researchers involved in the project	Surname		Y
Researchers involved in the project	Gender		Y
Researchers involved in the project	Nationality		Y
Researchers involved in the project	Email		Y
Researchers involved in the project	Career stage		Y



Technical overview

Glossary of terms and acronyms



XML (eXtensible Markup Language)

A structured format used to store and transport data. Commonly used for data exchange between systems.



XSD (XML Schema Definition)

A set of rules that define the structure and content of an XML file. Used for validation.



SFTP (Secure File Transfer Protocol)

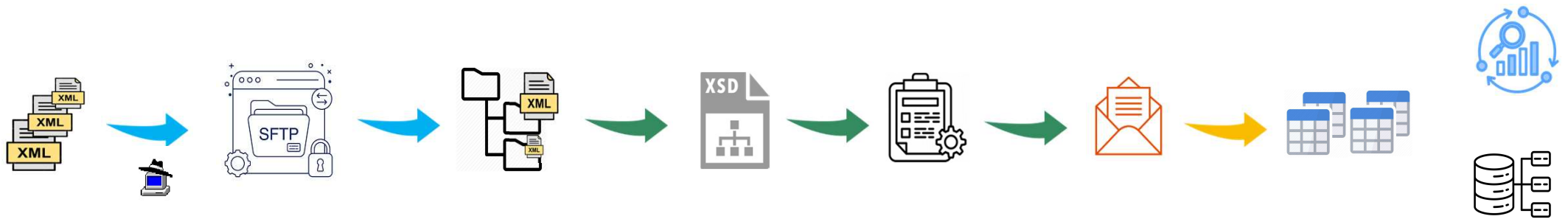
A secure way of transferring files over a network. It encrypts both commands and data.



ppk (PuTTY Private Key)

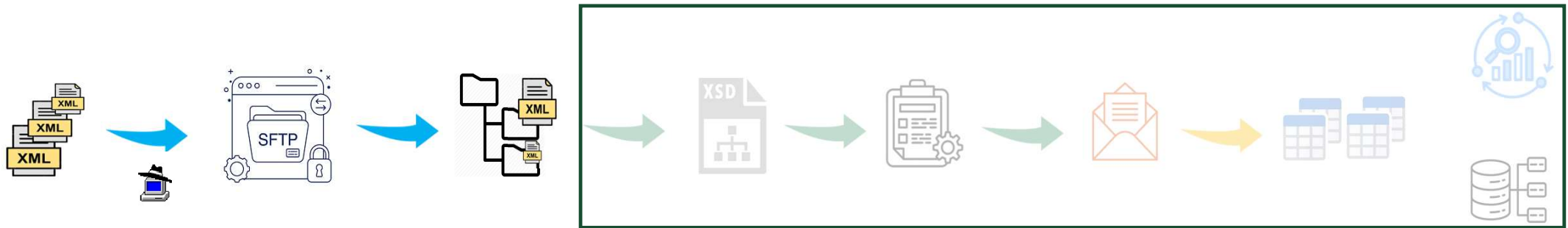
A file format used for secure authentication to SFTP servers. Unique to each partner.

Technical overview: upload, validation and integration



From ingestion to integration through validation...

Technical overview: upload, validation and integration



➡ File Upload via SFTP

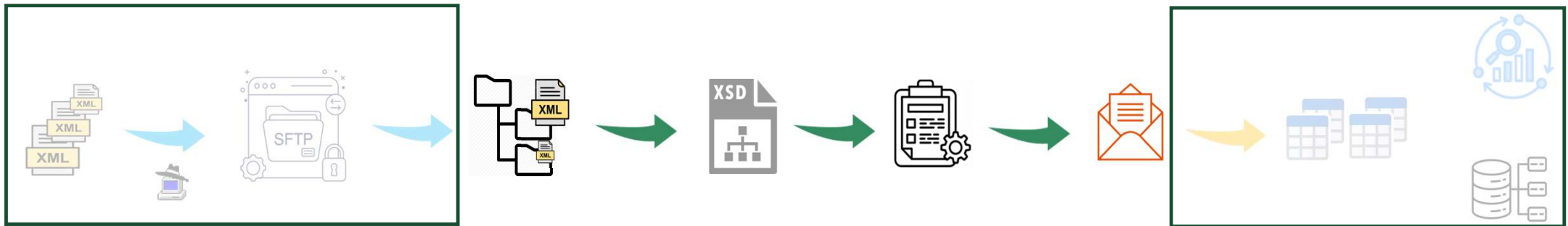
- Partners upload XML files to secure SFTP folders.
- Authentication via personal .ppk keys.



Initial File Handling

- Files are automatically downloaded.
- Naming conventions are validated.

Technical overview: upload, validation and integration



➔ Schema Validation

- XMLs are validated against predefined XSD schemas.
- Ensures structural compliance.

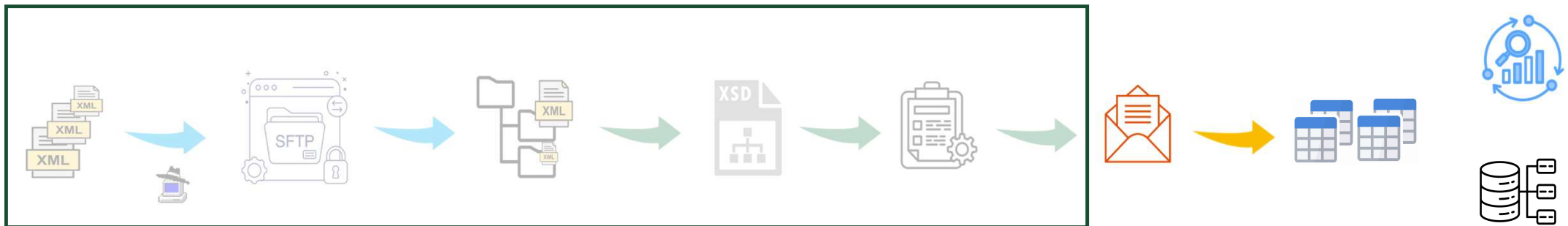
Business Rules Validation

- Domain-specific checks on data content.
- Ensures logical consistency and accuracy.

Error Reporting

- Failures are logged and reported.
- Automated emails sent with validation reports.
- Recipients defined by partner-specific mailing lists

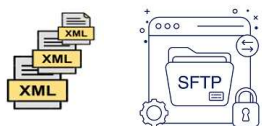
Technical overview: upload, validation and integration



➔ Data Integration & Enrichment

- Validated data is transformed and enriched.
- Loaded into the Internal Datamart for EU Consumption

Technical overview: common validation issues



Physical (file-level) errors

! Incorrect file naming convention

Does not match expected pattern for (e.g. PROP, PROJ)

! File not found in expected folder

Uploaded to the wrong SFTP path or incorrect folder structure

! File encoding issues

Non-UTF-8 encoding or malformed XML characters



Structural (XSD schema) errors

✗ Missing mandatory elements

Required XML tags are absent (e.g., <PIC Number> missing)

✗ Invalid data types

String provided where a number or date is expected

✗ Incorrect element order

XML nodes appear in a sequence that violates the XSD

✗ Incorrect value ranges

Negative values where only positives are allowed



Logical (business rule) errors

⊘ Duplicate entries

Repeated PICs or record keys

⊘ Invalid date values

Future dates, malformed formats, or logical inconsistencies (e.g., end date before start date)

⊘ Missing required data

Mandatory business fields (e.g., PICs, amount) are empty

⊘ Unmapped reference data

Codes, PIC and/or values not found / unknown in lookup tables



Next Steps

Finalisation and Validation

- Complete technical development of Results Template, ensuring usability and compliance with HE requirements.

Engagement on Technical and Procedural Aspects

- Identify any technical or procedural constraints encountered by Partnerships.
- Explore opportunities for alignment with existing internal systems and workflows.

Iterative Development and Testing

- Collect and integrate feedback from stakeholders.
- Collect feedback on existing project and proposal templates, enabling development of revamped versions.
- Pilot the Results Template to test functionality and usability.

Ongoing Support and Dialogue

- Maintain an open-door policy to provide guidance, address challenges, and ensure shared understanding.



Reach us

RTD-CORDA-SUPPORT@ec.europa.eu

RTD-EGDR-DATAIMPORT@ec.europa.eu



Thank you



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Monitoring and Evaluation of European Partnerships – the BMR approach

Implementing co-funded European Partnership: a Training for Newcomers

Effie Amanatidou, ERA-LEARN

Rome, 29-30 September 2025

The monitoring of partnerships in Horizon Europe

- In Horizon Europe, **partnerships monitoring will be fully integrated in the overall monitoring and reporting system of Horizon Europe**, as required in Horizon Europe Regulation, Article 50 and 52 and Annex III.
- **This means that aggregated project-level information for partnerships related projects will be available** on CORDA and the Horizon Dashboard to the public as the rest of Horizon Europe.

1. Programme-level (individual Partnerships)

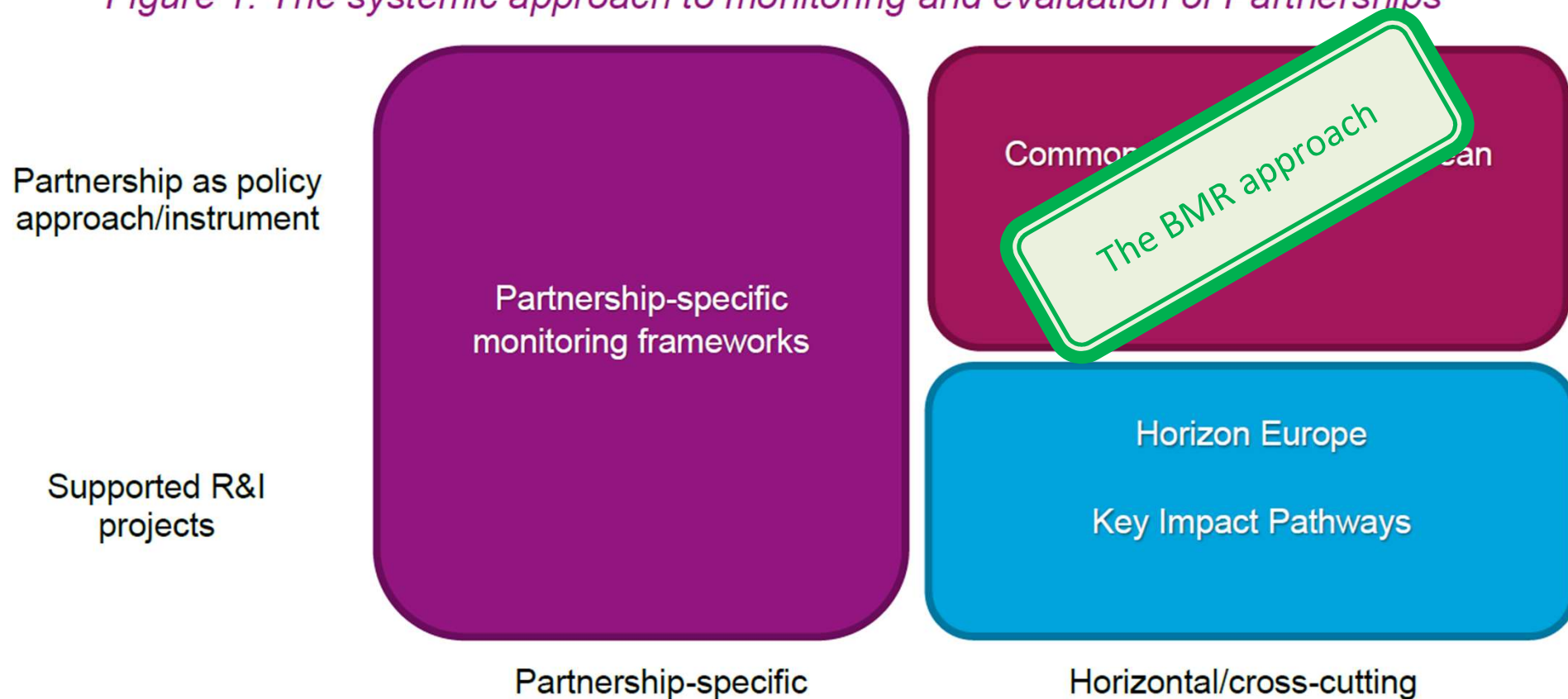
2. Level of the instrument, i.e., three instrument types: Co-funded, Co-programmed, and Institutionalized Partnerships (BMR)

3. Level of the EC R&I Framework Programme (currently called Horizon Europe)

A systemic approach to M&E of Partnerships

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Figure 1: The systemic approach to monitoring and evaluation of Partnerships



The BMR draws upon evidence that is gathered through the

- Common Indicators Survey (CIS) that includes indicators that are ‘**common**’, i.e., **horizontal across the three Partnership types**.
- Partnership fiches of the individual European Partnership performance.
- Country fiches covering the 27 EU Member States and some selected Associated Countries.

Set of specific indicators addressing the following Horizon Europe objectives for European Partnerships

- Additionality and directionality
- International visibility and positioning
- Openness and transparency
- Coherence and synergies
- *...any additions relevant for the thematic focus of each BMR...*

Clearly explained and defined – **baselines / target / progress**

Focusing on data that is not available in eCORDA

Survey questions that are **understandable and not too complex** with respect to the data needs

A good balance of fixed answer fields and open text fields

New BMR approach ensuring continuity to the degree possible while also addressing shortcomings of the past

Examples of indicators: #1 and #2

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Additionality and directionality

Indicator #1 Progress towards (financial and in-kind) contributions from partners other than the Union - i.e., **committed** vs. **actual** contributions [direct leverage]

- target for the whole partnership duration / H2020 baseline / progress (until August 2023 or latest available data)
- **in-kind** for Cofunded: all other except FSTP / in-kind for IPs: IKAA / in-kind within funded projects not that relevant

Indicator #2 **Broader investments** beyond the contributions from partners and triggered by the partnership that contribute to achieving their objectives

- Description: Qualitative: additional activities or investments triggered by the partnership (not as part of the partnership but in addition to it). These can include, e.g., private investments in training or activities required for putting on the market the product/service which results from the European Partnership, or public investments mobilised from other EU/ national / regional programmes (e.g., ERDF, CEF).

Example of indicators: #4

International visibility and positioning

Indicator #4 : Based on your best **guestimate**, how much of your overall budget is planned for connections/collaboration with non-European actors?

Description: quantitative (share) This can be calculated in several ways:

- At the programme level, if there is a special work-package in the partnership's work-programme dedicated to reaching out to non-European actors/countries, or there are discrete such activities that can be easily budgeted, OR if there is a non-European country (e.g. Israel) and makes a concrete contribution to the programme,
- At the project level, calculating the share of the project budgets that go to activities in/with non-European countries/actors

Please specify which way you use to estimate which part of the figure you give, e.g that part of the figure is at the programme level and that part (or a separate figure) is at the project level.

By non-European actors we mean actors in the Associated or Third countries.

Suggested indicators #5 and #6

Openness and transparency

Indicator #5 Measures ensuring continuous openness and transparency

Description: Qualitative

* 5a Do you have measures in place for a transparent and open involvement of stakeholders and all EU and associated countries, and for attracting newcomers? If no, when are they expected to be in place?

* 5c What are the most important measures in 2023 for involving various types of stakeholders and countries? (multiple choice)

Indicator #6: Membership in partnerships, including geographical coverage

Description: In order to establish the originally represented countries and organisation types, please upload here an Excel table listing all current partners of your partnership. Co-funded European Partnerships should report on the all types of members, e.g. Ministries, Funding Agencies, RTOs, private entities, etc. Co-programmed and institutionalised partnerships with associations representing the private or public members should report on the **members of the association.**

Coherence and synergies

Indicator #7a Coordinated and joint activities with other European Partnerships and EU Missions

Description: Qualitative.

* Please **select** the other European Partnerships and EU Missions with which you have established structured cooperation, e.g., joint or coordinated calls, priority setting, etc. [multiple choice, mark the names]at most 49 choice(s)

* Which of the **following activities** have you carried out jointly with other Partnerships or EU Missions until now (Aug 2023)? (multiple choice)

Indicator #7b Synergies with other EU programmes (multiple **choice** of EU programmes and **explanation of synergies**)

Lessons learnt for the Common Indicators' Survey

- Diversity of **interpretations of specific terms** across the partnership types (e.g. additional activities, or in-kind contributions).
- Inability to set **baselines and/or targets** for certain indicators.
- Lack of **methodology to monitor** certain indicators (e.g. contribution of partnership to EU goals like digital transition, green deal, or resilience, or impact of partnership results on policy, or “synergies with other EU programmes).
- **Lack of monitoring** certain indicators, e.g. investments triggered by the participation to partnerships but going beyond the partners' contributions, or complementary and cumulative funding from other Union or national/regional funds)

Partnerships' requirements in the BMR

Based on Michael Dooms contribution to the ERA-LEARN webinar “The new Monitoring and Evaluation (M&E) Framework for Partnerships”, 18 September 2023 - online



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the European Union**

under the Grant Agreement no. 101102316

Individual partnership monitoring in the BMR (1)

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Key objectives

- Provide **harmonized framework to internal and external stakeholders** (including non-experts) to present partnership key objectives and intended results (KPIs)

Implications

- **Strategy map** logic & focus on **key objectives** (“Partnership Specific Impact Pathways” or **PSIPs**)
- Limit number of pathways and objectives
- Understand key **interactions** between pathways and objectives
- Use similar design language for PSIPs
- Establish **strong link between PSIPs and selected indicators** (“two sides of the same coin”)
- **Less is more** approach (limit to max. 15 to 20 indicators)

Individual partnership monitoring in the BMR (2)

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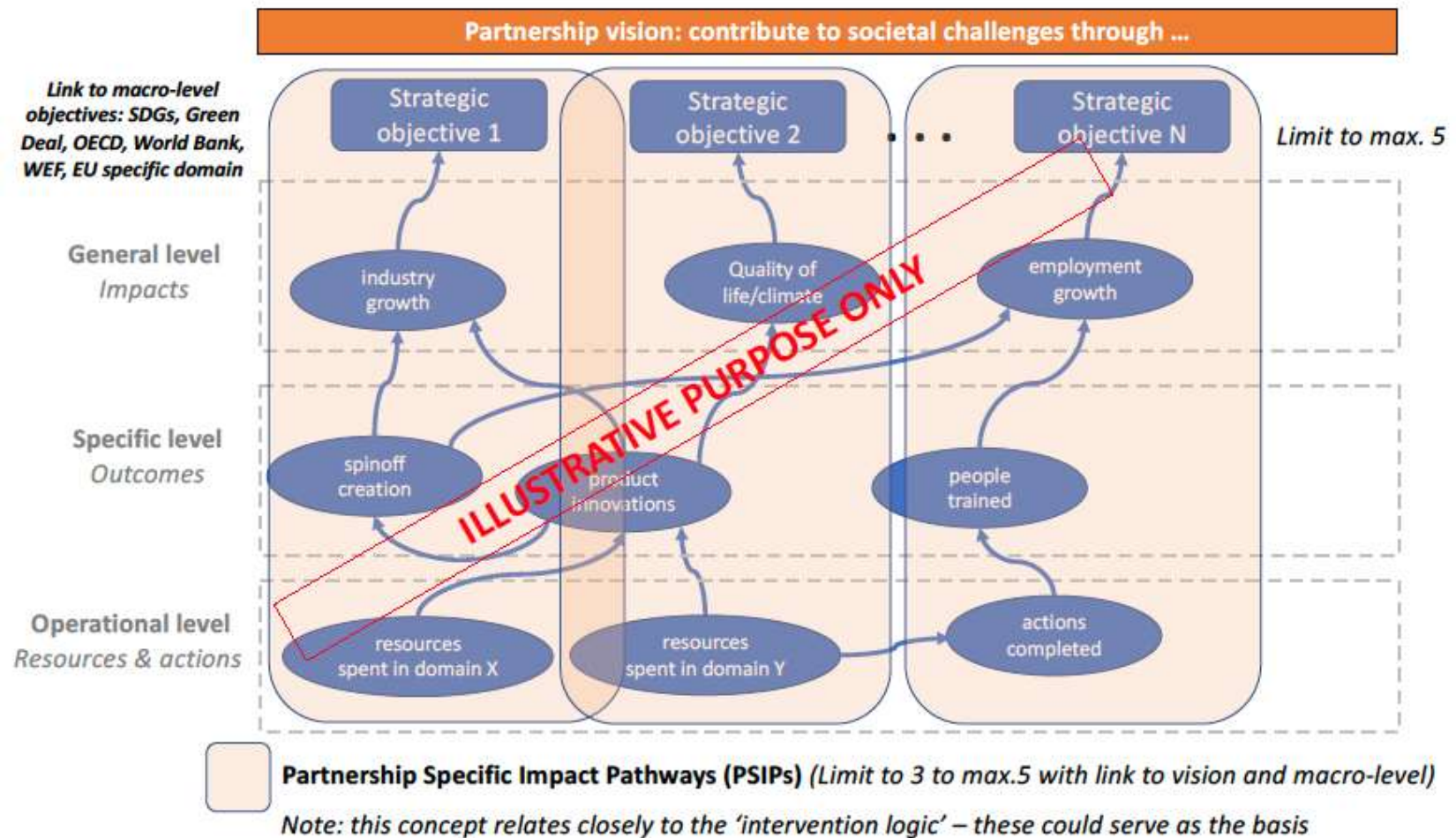
Data request (standardized MS Word and MS PowerPoint template)

- Basic identity data (MS Word)
- Shortened mission and vision statement (MS Word)
- PSIPs graph (MS PowerPoint)
- KPI Table (MS Word) – hard limit! (1 A4)
- Qualitative information (MS Word) – thematic content

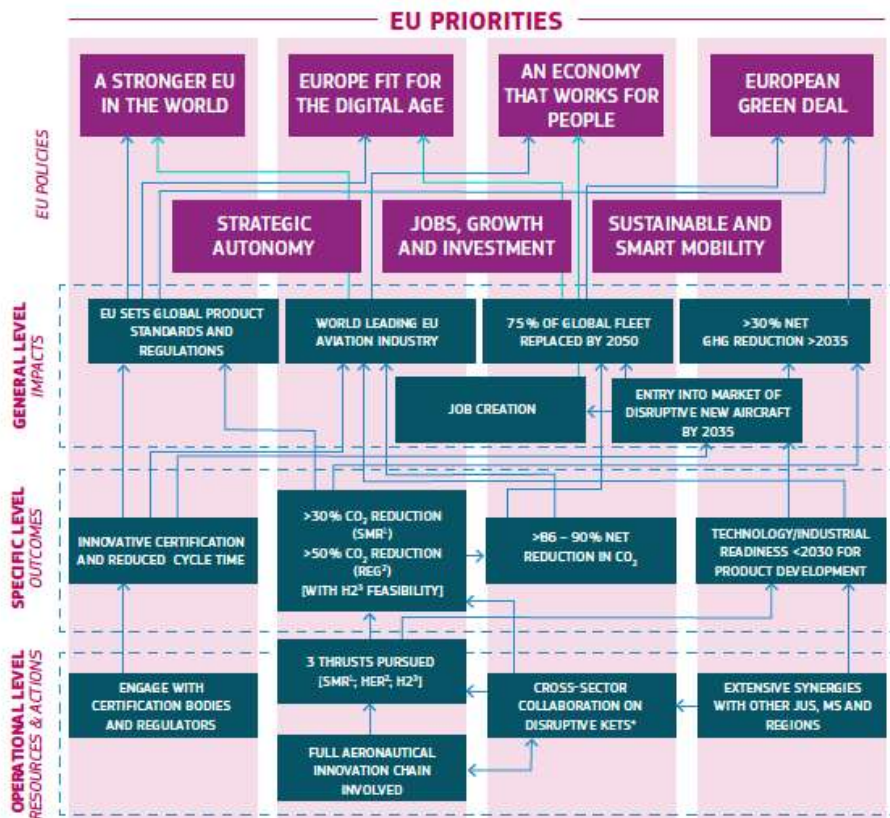
Data process:

- Interactive process with individual Expert Group member(s)
- Account management approach
- Dedicated MS Teams channel per partnership, e-mail, ...
- Typically 2 to 3 interactions in a period of 6 weeks to 2 months

Strategy Map (or PSIPs) – vertical logic



Example



¹SMR: ultra-efficient Short-Medium Range aircraft; ²HER: Hybrid-Electric Regional aircraft; ³H₂: disruptive technologies to enable Hydrogen-powered aircraft; *KETS: Key Enabling Technologies



Seek
Consistency



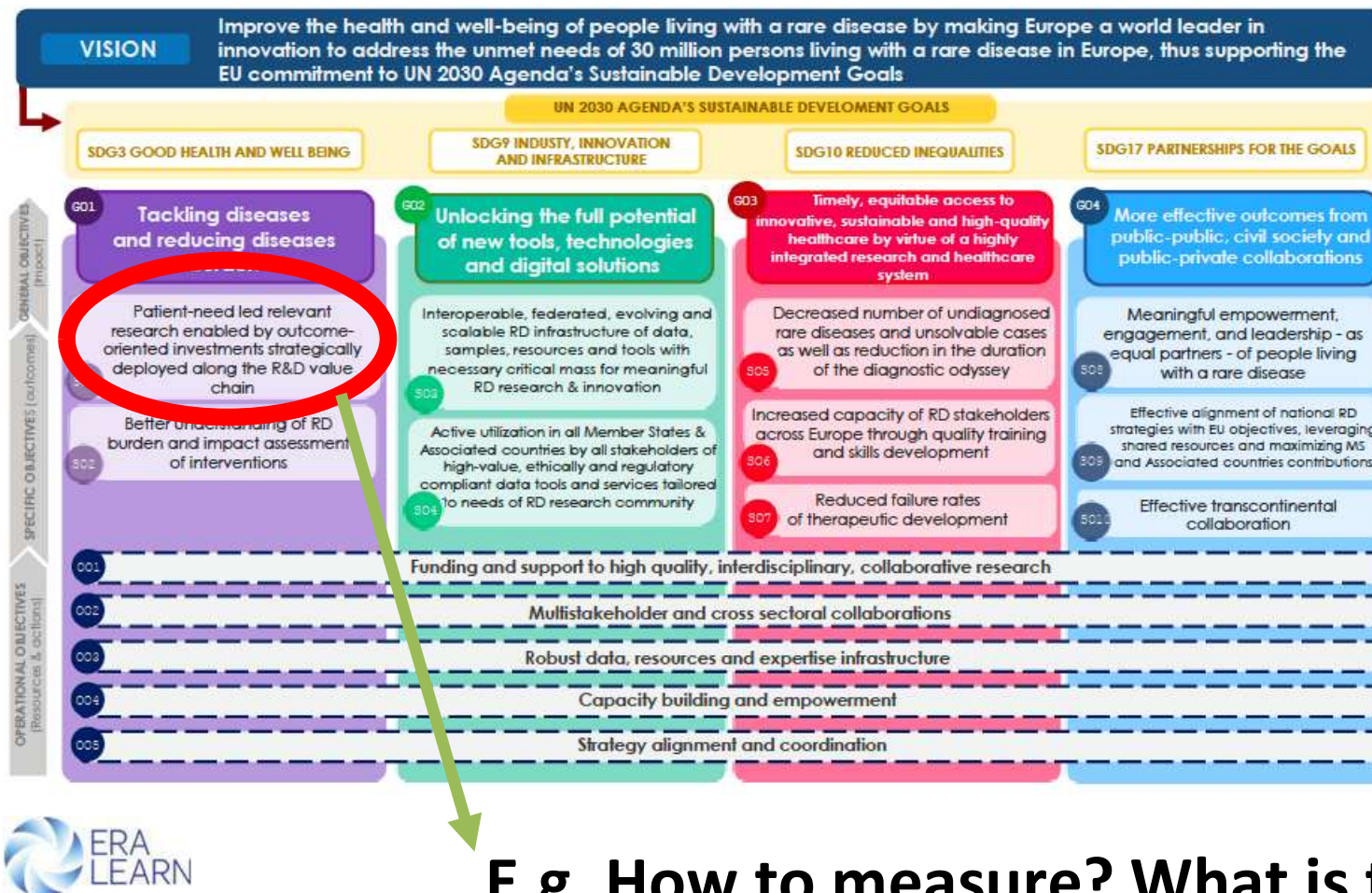
KPI NAME	UNIT OF MEASUREMENT	BASELINE	TARGET 2023	TARGET 2025	TARGET 2027	TARGET >2027
RESOURCES (INPUT), PROCESSES AND ACTIVITIES						
Newcomers (cross-over from non-aeronautical domains)	# and funding (euro)	N/A	TBD	TBD	TBD	TBD
Country participation (EU 27 and associated countries)	#	H2020 evaluation for first year level	TBD	TBD	TBD	TBD
Collaboration and Synergies <ul style="list-style-type: none"> within Horizon Europe within other EU Budget with national programmes regional programmes (RIS3) 	# and funding leveraged	H2020 evaluation or first year level	TBD	TBD	TBD	€ end of programme: >€100 m ³
Leverage effect from private sector contribution	# (defined as private sector contribution divided by the EU contribution)	H2020 evaluation or first year level	TBD	>0.41	>1.0	>1.41 (€ end of programme)
OUTCOMES						
Technology Readiness Levels	Critical technologies reaching TRL6 by 2030	H2020 evaluation or first year level	0	0	TBD	TBD
Demonstrated CO ₂ emissions reduction potential <ul style="list-style-type: none"> from SMR¹ from HER² 	%	2020 state-of-the-art technology	N/A	N/A	N/A	>30% (>2035)
IMPACTS						
Net GHG emissions reduction	%	compared to 2020 state-of-the-art	N/A	N/A	N/A	>30% (>2035)
Market deployment of CA solutions	# solutions (manufacturing ready)	TBD	Minimum 2 new aircraft (order by 2030, delivery by 2035)			
Fleet renewal	% (of the global fleet)	TBD	TBD	TBD	TBD	75% (>2050)
Time To Market Reduction (TTMR)	%	2020 certification processes	TBD	TBD	TBD	30% (2030)
Cost reduction of certification	%	2020 certification processes	TBD	TBD	TBD	30% (2030)
EU aeronautics leadership	Global market share in leading technologies	2020 market share	EU aeronautics maintains its 2020 global market share			

¹ with 3 JUs, 2 Cluster R&D WP areas

² SMR Short-Medium Range aircraft

³ HER: Hybrid Electric Regional aircraft

EJP RD: on the right track, but...



- Reduce amount of text
- Bring in logical **pathways** from resources and actions to outcomes and impacts
- Maybe lose one of the streams (proposal SDG 17) or integrate elsewhere (seems difficult to measure)
- Be **more concrete** on the level of **actions and resources** & link to **pathways**
- Select most **meaningful / impactful elements** from table 2 targets

Lessons learnt for the Partnership Fiches

- **Wide variety** of graphs / schemes to depict the [intervention logic](#).
- **Difficulties** in developing the [Partnership-specific Impact Pathways \(PSIPs\)](#).
- Lack of connection between set **objectives and defined indicators**.
- Difficulties in creating **concrete and measurable KPIs**, clearly linked to [PSIPs](#) and partnership lifecycle plans with well-defined baselines - too many indicators.
- Abstract and overly **complicated monitoring** and evaluation frameworks.
- Internal governance processes for approval + stakeholder consultations (KPIs tend to be sensitive matter) – plan upfront / allow sufficient time for the framework to mature.
- BMR data and information is not legally binding, just needs **consistency with other formal**, contractual documents.
- **Internal resources and competences** needed to set up monitoring systems – avoid ‘box ticking’ exercises
- Partnership fiches and indicators provide the **bottom-up perspective** – include **when relevant** to reach objectives (e.g. synergies, newcomers, international/global presence,...) or specify (e.g. focus on specific category of newcomers).

Countries' requirements in the BMR

Based on Ülle Napa's contribution to the ERA-LEARN webinar "The new Monitoring and Evaluation (M&E) Framework for Partnerships", 18 September 2023 - online

COUNTRY FICHE: AUSTRIA



KEY HIGHLIGHTS

Austria has increased its already very active participation in European Partnerships. Austrian policymakers appreciate the opportunities that European Partnerships offer.

Austria aims to align European and national priorities as part of its beneficial European Partnerships. The European priorities of the Green Deal, the UN SDGs, are among the guiding principles of our focus on participation in European Partnerships.

Participating in **21** European Partnerships out of 22(*) (95%)

Increased - BMR 2022 value: 71%

Source: EC and country commitment letters – BMR 2022 refers to H2020 Partnerships.

(*) Out of the 49 partnerships, 22 are relevant for country participation – this is the total. (**) Out of the 22 partnerships that are relevant for country participation, countries can participate in 21.

EUR 310 million

in commitments in European Partnerships

Or **2 %** of total commitments (*)

139 % increase since BMR 2022 (EUR 129 million) (**)

Source: EC and country commitment letters.

(*) The figure is estimated based on the commitment letters sent by the country to the from the Grant Agreements were considered in the absence of commitment letters for the rest as in-kind contributions minus 30 % of the EU top-up and 50 % for PARC.

(**) Commitment letters for the second batch of the Co-funded Partnerships from the country in the total commitments.

(*) The country figures in the previous BMR showed the actual contributions instead of the pre-call contributions were considered instead of the actual national contributions to the total commitments.

(**) Commitments per researcher are the total commitments by a country divided by the number of researchers between 2017–2021, based on EUROSTAT data.

KEY INTENTIONS FOR THE FUTURE

Austria continues its active participation in European Partnerships as on European participation and integration.

Austria leads the Co-funded Partnerships Driving Urban Transition as a correspondence with national missions demonstrating long-term impact.

Austria is also actively involved in ongoing and recently-established Partnerships. The participation is connected with the Austrian Strategy for Research and Innovation. The priorities for transformative innovation policy in domains such as digital, climate-neutral and smart cities.

COUNTRY FICHE: AUSTRIA

DIRECTIONALITY

Austrian priorities for participation in European Partnerships. Austria aims to enable the active participation in the implementation of EU Missions in Austria.

Austria actively supports the participation in European Partnerships. This is particularly the case for the Partnership that corresponds to the transformative mission such as Mission: A Soil Deal for Europe.

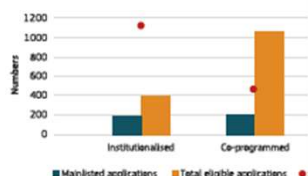
In addition, Austria commenced its participation evaluation plan through to 2030 and a sufficient funding plan.

TABLE 1: Distribution of funding based on thematic clusters

HE CLUSTERS
Research infrastructures (Horizon 1.3)
Health (Horizon 2.1)
Digital, industry and space (Horizon 2.4)
Climate, energy and mobility (Horizon 2.5)
Food, bioeconomy, natural resources, agriculture and environment (Horizon 2.6)
Total

Source: EC eCORDA – Cleaned up and further elaborated by FFG and the expert group covered as the data are not yet in the system. The status of a project belonging to a topic is based on certain information in the database: call, topic and topic description, and instrument.

FIGURE 1: Eligible proposals, projects and success rates



Source: EC eCORDA – Cleaned up and further elaborated by FFG and the expert group covered as the data are not yet in the system. The status of a project belonging to a topic is based on certain information in the database: call, topic and topic description, and instrument. HES: higher education; OTH: other; PRC: private-for-profit companies.

COUNTRY FICHE: AUSTRIA

In regard to industry-driven EU initiatives like Institutionalised Partnerships, Austria has increased its successful participation since 2022. For example, the part that even a small country like Austria can have a strong position and its strategic autonomy (EU-SA) and related research and innovation projects.

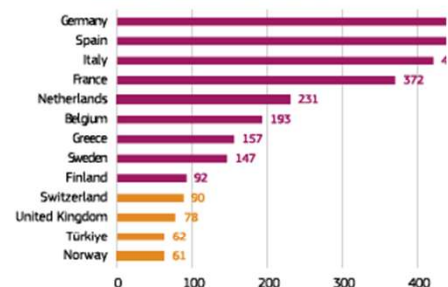
ADDITIONAL ACTIVITIES TRIGGERED / IMPACT OF

Austria launched four transformative national research and innovation Partnerships and that participate in the respective partnerships include Clean Energy Transition, the Mobility Transition, and the Circular Economy policy goals such as Fit for 55, the NetZero Industry Act, the Critical Raw Materials Act. For these four transformative missions, Austria has developed long-term funding plans and has secured sufficient and stable R&I funding until 2026.

COMPLEMENTARY AND CUMULATIVE FUNDING

The Clean Energy Transition Partnership can be seen in the context of the Chips JU, which further corresponds to its Participation in the Driving Urban Transition Partnership in defining R&I activities related to the Chips JU.

FIGURE 3: Top collaborators with Austrian researchers under 1 selected third/Associated Countries



Source: EC eCORDA – Cleaned up and further elaborated by FFG and the expert group covered as the data are not yet in the system. The status of a project belonging to a topic is based on certain information in the database: call, topic and topic description, and instrument.

The values in Figure 3 are in line with the European Partnership average

COUNTRY FICHE: AUSTRIA



SUCCESS STORIES

The impact of Austria's participation in European Partnerships has had a notable impact, evident through numerous examples such as:

- The Driving Urban Transition Partnership has had a high impact on Austrian R&I in its domain, as well as on the EU Cities Mission, and at the Austrian national level with its transformative Climate-Neutral City mission.
- Austrian researchers successfully participated in ERA-NET Biodiversa. This laid the groundwork for the new European Partnership Biodiversa+, in which Austria will participate and from which the Austrian research community can highly benefit.
- Austria implements its common position on alignment as agreed among the major R&D stakeholders. This was a collaborative process bringing together the relevant Austrian research stakeholders to work towards a common national agreement on transnational alignment in research strategy, planning and funding. For details, see https://www.era-learn.eu/documents/eralearn2020_143_casestudy04_commonalignmentpositioninaustria_final.pdf.
- When the European Chips Act – with the Chips JU as its R&I component – was launched, Austria substantially increased its already high commitment to the Chips JU and secured an additional EUR 71 million. To enable the establishment of manufacturing facilities as a follow-up to R&I and to ensure the security of supply and resilience of the EU's semiconductor sector, the Austrian Ministry in charge secured substantial additional funding sufficient for the requirements of Austrian industry.
- Corresponding to its participation in European Partnerships, Austria is actively participating in IPCEIs. IPCEIs focus on sectors important for addressing European strategic autonomy and technological sovereignty. Austria participates in a high share of the IPCEIs established thus far, namely in the IPCEI on Batteries, two IPCEIs on Hydrogen and the two IPCEIs on Microelectronics.

ADDRESSING EUROPEAN STRATEGIC AUTONOMY

As in many other countries, strategic autonomy and technological sovereignty is an increasingly important issue in Austria. Austria is exploring measures on how to tackle relevant aspects. As institutions are autonomous in their collaboration strategy, only guidance can be developed at the policy level.

One such aspect of strategic autonomy/technological sovereignty is the increased focus on research security and the avoidance of foreign interference in R&I. Here, Austria has anchored the topic in its national ERA Action Plan 2022–2025, along with a baseline study that is currently being conducted among Austrian Higher Education and Research organisations, which aims to raise awareness and identify areas of joint action.

Lessons learnt for the Country Fiches

- **Due time notifications to MS/ACs** to allocate the time and resources needed - depending on the country, this might mean involving many different actors and organisations.
- **Close ongoing consultation important with MS/ACs** - strongly iterative process (emails, office hours, MS teams space) in helping them review and finalise pre-filled country fiches.
- **Country fiche – rather a process** (also at national level) than just a ticking the box exercise.
- Data collection from countries depends on the **existence of a national level monitoring** system but in the majority of cases this is still being developed.
- It is important, if possible, to create/maintain a national monitoring system that should be complementary to the EC one.

Get assistance

- The **BMR approach is highly interactive** both at the adjustment phase and implementation!
- The ERA-LEARN [R2IPE toolkit](#) includes advice and guiding questions, tips, and examples for all the stages and tools of a typical monitoring and evaluation system for both the evaluation of the individual Partnerships (Monitoring and Evaluation Basics) and the Horizon Europe (BMR) approach.
- The ERA-LEARN webinars are helping the Partnerships develop their own monitoring and evaluation systems and respond to the needs of the BMR. The slides from past webinars include lessons learnt, advice for Partnership and member states, good practice tips and examples, and Q&A summaries. Watch them to learn more:

[Webinar on Monitoring & Evaluation of Partnerships based on the BMR approach, 2023.](#)

[Webinar: The new Monitoring and Evaluation \(M&E\) Framework for Partnerships, 2022.](#)

[ERA-LEARN workshop on monitoring and evaluation of P2Ps in Manchester, 2020.](#)

ERA-LEARN Guiding material & information

Governance, Administration & Legal Base

Home / Support for Partnerships / Governance, Administration & Legal Base / Monitoring and Evaluation of European R&I Partnerships: The R²IPE toolkit

Monitoring and Evaluation of European R&I Partnerships: The R²IPE toolkit



European R&I partnerships are a framework programme, Horizon, is vital for both establishing the framework over the years, in addition to

The need for a common framework for research and innovation as well as acknowledged. To contribute to the European R&I Partnerships, an Expert Group to support the framework and methodology

Monitoring & Evaluation Basics

- Monitoring system
- Intervention logic - Logic Frame
- Evaluation timing & questions
- Data collection
- Data analysis
- Using the results (quality of report, communication)
- Challenges in M&E of Ps

Each topic including examples and good practice tips

R²IPE Cross-references

The Horizon Europe approach

- BMR requirements
- Complementarity of the new approach
- The partnership level
- The country level
- The EC level

Each topic including good practice examples and lessons learnt from BMR

Glossary

Further Reading

Tools for internal review of participation in networks

List of criteria to access network participation



- make use of provided material
- participate in events
- subscribe to (bi-)monthly news alert: <https://www.era-learn.eu/newsletter>

The R²IPE toolkit



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under the Grant Agreement no. 10110231



#HorizonEU

THE EU RESEARCH & INNOVATION PROGRAMME

2021 – 2027

EUROPEAN PARTNERSHIPS UNDER HORIZON EUROPE

ERA-LEARN Newcomer Workshop:
Implementing co-funded European
Partnerships

Phasing out strategies
30 September 2025

Kathrin Kapfinger,
DG Research & Innovation
G.4 – Common Missions & Partnerships
Service

Research
and
Innovation

Rationale

- **Phasing out** = a (possibly gradual) discontinuation of funding from the Framework Programme
- **Legal obligation** set out in the Horizon Europe Regulation (Article 10.2(c) and Annex III.4(b))
- **Life-cycle:** remain impactful, relevant and efficient over time
- **Forward-looking exercise:** opportunity to articulate and communicate the partnership's strategic vision on its future role and evolution and secure its legacy
- **Developing a phasing out strategy ≠ Discontinuation of the partnership**
- Failure to comply → weakness when assessing the partnership's performance and future prospects

Support materials and process

- **Guidelines** for the development of phasing out strategies
- Online **workshop** on 25 September (recording, presentations, and Q&A will be published shortly)
- **Alignment of timelines** for latest adoption dates for all types of partnerships
- Coordination in **thematic clusters** and benefit from the **guidance and support** of the European Commission services → robustness, cross-fertilisation and strategic alignment

July 2025

Kick off:
sharing of
guidelines

Dec 2025

Feedback
round: draft
strategies
shared with EC
services

Mar 2026

Finalisation &
adoption

Sept 2025

Online workshop
on the design of
phasing out
strategies

Jan 2026

Feedback round:
feedback from EC
services for revisions

Guidelines

- Strategy should be a **concise, strategic, and living document**
- Several scenarios may be explored, ≤ 3 pages per scenario
- **Compulsory elements:**
 - At least one credible scenario **without EU Framework Programme funding**
 - Each scenario: alternative **implementation modality**, a realistic, **actionable pathway** and an indicative **timeline**
 - **Indicators** for assessing progress towards the phasing out
 - **Consistency** with the overall strategic orientation and **coherence** with the policy context



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Further information: <https://www.era-learn.eu/support-for-partnerships>

Events: <https://www.era-learn.eu/news-events/events>

Newsalert: <https://www.era-learn.eu/newsletter>

