Implementing co-funded European Partnership: a Webinar for Newcomers

10 September 2026

Aim of the Webinar

Scope of the webinar:

- Guide participants through the operational aspects of managing and implementing of co-funded partnerships
- Share best practices and real-world case studies
- Equip participants with the tools and knowledge to engage effectively in co-funded European Partnerships

Out of scope:

- Discuss individual partnerships specific challenges
- The future of European Partnerships in FP10
- Any topics concerning particular calls of partnerships

European Commission

	Agenda	Speaker
	Moderation: Noemi Bergesio, ERA-LEARN	
9:00	Introduction to ERA-LEARN	Roland Brandenburg (ERA-LEARN)
	Introduction co-funded partnership	Antonios Marinopoulos (DG RTD.G.4)
	Legal and financial requirements for Co-funded European Partnerships in Horizon Europe	Bartosz Majewski (DG RTD, H.1), Dominika Trzaska and Gianmaria Maule (REA.B2)
	Sharing experiences (Q&A)	Speakers and Margherita Cappelletto (SBEP), Theresa Losek (DUT), Wolfgang Ballensiefen (EP PerMed)
	What is the work of a co-funded partnership/ Call management and additional activities	Malwina Gebalska (ERA-LEARN)
	Internal financial arrangements/ ERA-LEARN observations and suggestions	Roland Brandenburg (ERA-LEARN)
	Tools provided by ERA-LEARN/ Overview of available material	Christiane Wehle (ERA-LEARN)
	Sharing experiences (Q&A)	Speakers and Margherita Cappelletto (SBEP), Theresa Losek (DUT), Wolfgang Ballensiefen (EP PerMed)
	Wrap Up	
13:00	Closing	

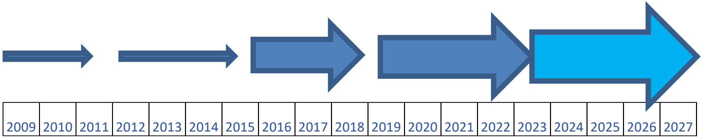
ERA LEARN

ERA-LEARN:
central information hub for European Partnerships
Who we are and what we do

Roland Brandenburg (ERA-LEARN)

ERA-LEARN: service provider & facilitator

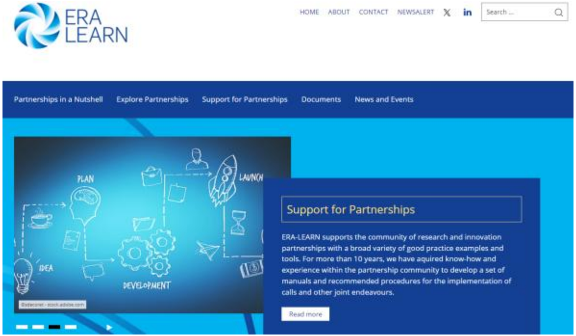
- consortium of funding organisations and analysts
- providing support & guidance to the community since 2009
- **current phase July 2023 - June 2027**
- supporting the European Partnerships under Horizon Europe



ERA-LEARN reaches out to all stakeholders:

- Policy level
- Networks
- Funding organisations
- Researchers

Central information hub: the ERA-LEARN portal



Find information on European Partnerships!
https://www.era-learn.eu

- **Partnerships in**Strategic **a nutshell**
  - Selection Criteria for European Partnerships
  - Types & Portfolio
- **Explore Partnerships**
  - networks
  - calls
- **Support for Partnerships**
  - Governance & financial administration
  - Joint calls
  - Additional activities
- **Documents**
  - guiding material
  - reports
  - event documents
- **News & events**

Eur. Partnership portfolio (2021-2027)

Institutionalised partnerships (Art. 185/7, EIT KICs) | Co-funded partnerships | Co-programmed partnerships | Proposed new candidate European Partnerships under the 2nd Strategic Plan 2025-2027

Pillar II - Global challenges & European industrial competitiveness

Cluster 1: Health
- Innovative Health Initiative
- Global Health EDCTP3
- Assessment of Risks of Chemicals (PARC)
- Transforming of Health Care Systems
- ERA for Health
- Rare Deseases
- One-Health Antimicrobial Resistance
- Personalised Medicine
- Pandemic Preparedness
- Brain Health

Cluster 2: Culture, Creativity, Inclusive societies
- Resilient Cultural Heritage
- Social Transformations and Resilience

Cluster 4: Digital, Industry and Space
- Chips JU
- Smart Networks and Services
- High Performance Computing
- European Metrology (Art. 185)
- Raw Materials for the Green and Digital Transition
- AI-Data-Robotics
- Photonics
- Made in Europe
- Clean Steel - Low Carbon Steelmaking
- Processes4Planet
- Globally Competetive Space Systems
- Innovative Materials for EU (I AM for EU)
- Virtual Worlds
- Textiles of the Future

Cluster 5: Climate, Energy and mobility
- Clean Hydrogen
- Clean Aviation
- Single European Sky ATM Research 3
- Europe's Rail
- Clean Energy Transition
- Driving Urban Transition
- Connected, Cooperative and Automated Mobility
- Batteries
- Zero-Emission Waterborne Transport
- Zero-Emission Road Transport
- Built4People
- Solar Photovoltaics

Cluster 6: Food, bioeconomy, natural resources, agriculture and environment
- R&I in the Mediterranean Area (PRIMA) (Art. 185)
- Circular Bio-based Europe
- Biodiversa+
- Blue Economy
- Water4All
- Animal Health and Wellfare
- Accelating Farming Systems Transformation
- Agriculture of data
- Safe and Sustainable Food Systems
- Forests and Forestry for a sustainable Future

Pillar III - Innovative Europe & Cross-Pillars

EIT: The European Institute of Innovation and Technology
- EIT InnoEnergy
- Climate KIC
- EIT Digital
- EIT Food
- EIT Health
- EIT Raw Materials
- EIT Manufacturing
- EIT Urban Mobility
- Cultural and Creative Sectors and Industries

European Innovation Ecosystems
- Innovative SMEs

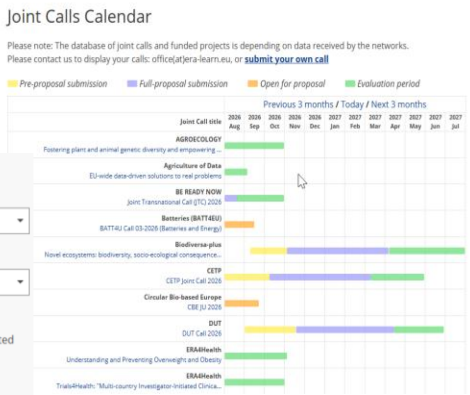
Cross-Pillars II and III
- European Open Science Cloud

https://www.era-learn.eu/partnerships-in-a-nutshell/european-partnerships/european-partnership-portfolio

Partnership Portfolio Timeline

Partnership network database: all types of Partnerships

- all Partnerships from all framework programmes
- timeline with predecessors
- filter by type, country, ..
- participations of individual organisations
- call calendar: joint calls launched by Partnerships



Search table ...

NAME	START DATE	END DATE	FUNDING FRAMEWORK	PARTNERSHIP FORMAT	COUNTRIES	COORDINATOR
Agriculture of Data Agriculture of data	01/10/2025	30/09/2032	Horizon Europe	Co-funded Partnership	23	Pending
AGROECOLOGY Accelerating farming systems transition: Agroecology living labs and research infrastructures	01/01/2024	31/12/2030	Horizon Europe	Co-funded Partnership	26	PTJ/FZJ
BE READY NOW BE READY NOW - EUROPEAN PARTNERSHIP FOR PANDEMIC PREPAREDNESS	01/01/2026	31/12/2032	Horizon Europe	Co-funded Partnership	27	ANRS
Biodiversa-plus The European Biodiversity	01/10/2021	30/09/2028	Horizon Europe	Co-funded Partnership	38	FRB

Filter Partnerships

Countries participating

Select countries

Organisation participating

Select organisation

Internationalisation

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

Partnership format

Co-funded Partnership

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Documents, facts & figures

- Guiding material
  - Co-funded Partnerships for Newcomers
- Country reports
- Activity reports
- Policy briefs
- external documents

Supporting the practical implementation of Partnerships

Partnerships in a Nutshell | Explore Partnerships | Support for Partnerships | Documents | News and Events

GOVERNANCE, ADMINISTRATION & LEGAL BASE

Governance Models of Horizon Europe Partnerships

Agreements

Financial Issues

Monitoring and Assessment

Responsible Research & Innovation

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

IMPLEMENTING JOINT CALLS

Call plannin

After the Call

CROSS-CUTTING ISSUES AND ADDITIONAL ACTIVITIES

Strategy and Foresight

Alignment and Synergies

Knowledge Valorisation and Stakeholder Engagement

International Cooperation

Openness and Transparency

Widening Participation and the European Research Area

- manuals and tools
- guiding docs
- examples of good practice

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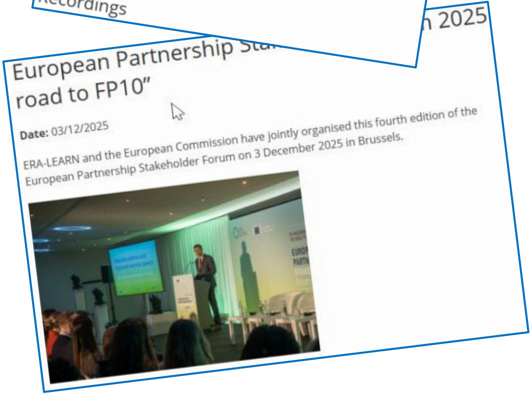
Benefit from provided material!

ERA-LEARN: interaction with community

https://www.era-learn.eu/news-events/events

- **Workshops/trainings/webinars on specific issues (co-organised with DG RTD)**
  - Webinar on Data Transfer for Eur.Partnerships (20 Jun 2025)
  - Workshop on Phasing-out Strategies (25 Sep 2025, 11 Feb 2026)
  - Training: Implementing co-funded PS (29-30 Sep 2025)
  - Looking ahead: European Partnerships and Pathways to Sustainability (26 Feb 2026)

- **annual large events (co-organized with DG RTD)**
  - Annual Partnership Stakeholder Forum (15-16 Nov 2022)
  - Annual Partnership Stakeholder Forum (5-6 Dec 2023)
  - Annual Partnership Stakeholder Forum (4-5 Dec 2024)
  - Annual Partnership Stakeholder Forum (3 Dec 2025)
  - **Networking Event for Europ. Partnerships (18 Nov 2026)**



→ participate in events!

ERA-LEARN: interaction with community

Welcome to the ERA-LEARN newsalert!

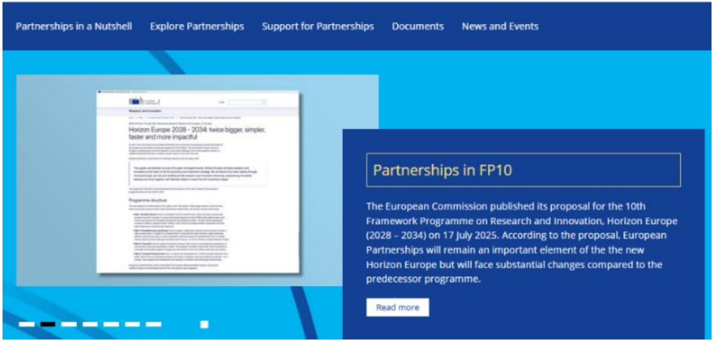
18/11/2026

Save-the-Date! Networking event for the European Partnership community in Vienna

As the next European Partnership Stakeholder Forum has been scheduled by DG RTD for 2027, after concluding the negotiations on Horizon Europe 2028-2034 , ERA-LEARN will organise a networking event for the Partnership community on 18 November 2026 in Vienna, Austria. The one-day event will start in the morning and conclude with a networking dinner in the evening. Further details on the programme, agenda and registration will be published soon on the ERA-LEARN website.

- **Stay up to date -register to our news alert:**

https://www.era-learn.eu/newsletter



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ERA-LEARN: central information hub for Eur. Partnerships

Funded by the European Union

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ERA LEARN

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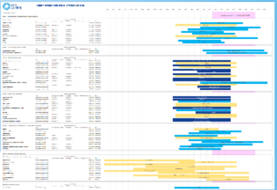
www.era-learn.eu

Support & guidance:

https://www.era-learn.eu/support-for-partnerships

Guide on co-funded European Partnerships: an essential introduction for newcomers

HE partnership portfolio



Events:

https://www.era-learn.eu/news-events/events

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European Commission

#HorizonEU

THE EU RESEARCH & INNOVATION PROGRAMME

2021 – 2027

EUROPEAN PARTNERSHIPS UNDER HORIZON EUROPE

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

Introduction
10 September 2026

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

Research and Innovatio

European Partnerships – what and why

European Partnerships are strategic instruments which enable long-term collaborations between the Union and public and/or private partners to tackle common challenges through the co-design and implementation of joint R&I programmes

STRATEGIC ORIENTATION

Foster directionality of funding in line with EU policy priorities

CREATING CRITICAL MASS

- Avoid fragmentation and duplication of R&I efforts
- Achieve greater scale and impact

FOSTERING ECOSYSTEMS

- Integrated value chains and ecosysems
- Integrative activties outside of funding

New approach under Horizon Europe

New generation of objective-driven and more ambitious partnerships in support of agreed EU policy objectives

Key Features

- **Strategic orientation**
- **Simple architecture and toolbox**
- **Common set of criteria for the entire life-cycle (Horizon Europe regulation Article 10 and Annex III)**

CO-PROGRAMMED
Based on Memoranda of Understanding/contractual arrangements; implemented independently by the partners and by Horizon Europe

CO-FUNDED
Based on a joint programme agreed and implemented by partners; commitment of partners for financial contributions and additional activities

INSTITUTIONALISED
Based on long-term dimension and need for high integration; partnerships based on Art 185/187 of TFEU and the EIT legal acts for 2021-2027

Strategic Coordinating Process

- Governance framework for European Partnerships
- Objective: support an evidence-based policy for partnerships and a strategic vision of the landscape
- Partnership Knowledge Hub (PKH)
- Biennial Monitoring Report (BMR)
- European Partnership Stakeholder Forum

European Commission

Budgetary commitments to European Partnerships*

PARTNERSHIPS

59
European Partnerships

€26 bn*
Estimated commitments from Horizon Europe

44%*
Of Horizon Europe’s Pillar II budget

Over 25%
of Horizon Europe total

€39.7 bn*
Estimated total commitments from partners other than the Union

State of play September 2026
** Excluding candidate partnerships still under preparation*

Overview of European Partnerships

PILLAR II - Global challenges & European industrial competitiveness

PILLAR III - Innovative Europe

CLUSTER 1: Health
- Innovative Health Initiative
- Global Health Partnership
- Transformation of health systems
- Chemicals risk assessment
- ERA for Health
- Rare diseases
- One-Health Anti Microbial Resistance
- Personalised Medicine
- Pandemic Preparedness
- Brain Health

CLUSTER 2: Culture, Creativity, Inclusive Societies
- Resilient Cultural Heritage
- Social Transformations and Resilience*

CLUSTER 4: Digital, Industry & Space
- Chips (formerly KDT)
- Smart Networks & Services
- High Performance Computing
- European Metrology (Art. 185)
- AI-Data-Robotics
- Photonics
- Made in Europe
- Clean steel – low-carbon steelmaking
- Processes4Planet
- Global competitive space systems
- Innovative Materials for EU (I AM for EU)
- Virtual Worlds
- Textiles of the Future
- Raw Materials for the Green and Digital Transition

CLUSTER 5: Climate, Energy & Mobility
- Clean Hydrogen
- Clean Aviation
- Single European Sky ATM Research 3
- Europe's Rail
- Connected and Automated Mobility (CCAM)
- Batt4EU
- Zero-emission waterborne transport
- Zero-emission road transport
- Built4People
- Solar Photovoltaics
- Clean Energy Transition
- Driving Urban Transitions

CLUSTER 6: Food, Bio-economy, Agriculture, Env…
- Circular Bio-based Europe
- R&I in the Mediterranean Area (PRIMA, Art. 185)**
- Biodiversa+
- Climate Neutral, Sustainable & Productive Blue Economy
- Water4All
- Animal Health & Welfare
- Accelerating Farming Systems Transitions
- Agriculture of Data
- Safe & Sustainable Food System
- Forests and Forestry for a sustainable Future

EUROPEAN INNOVATION ECOSYSTEMS
- Innovative SMEs

EIT
- InnoEnergy
- Climate
- Digital
- Food
- Health
- Raw Materials
- Urban Mobility
- Cultural and Creative Industries
- Water, Marine and Maritime Sectors and Ecosystem

CROSS-PILLARS I AND II
- European Open Science Cloud

Legend:
- Institutionalised Partnerships (Art 185/7)
- Institutionalised partnerships / EIT KICs
- Co-Programmed
- Co-Funded

** Not yet launched*
*** Direct continuation of a H2020 partnership*

Co-funded European Partnerships (I)

- **Partners:** National funding bodies/agencies, ministries
- **Legal form:** Grant Agreement (based on a programme co-fund action) signed between a consortium of beneficiaries (the partners) and the Commission
- **Implementation:**
    - Partners design a common programme to be implemented under their responsibility, pooling national funding/resources with co-funding from the Union
    - Joint transnational calls (financial support to third parties) as usually the principal activity, complemented by additional activities fostering further integrartion
    - Calls and evaluations are organised centrally, beneficiaries in selected projects are funded at national level (on the basis of rules agreed by partners and national rules)
    - Funding rate 30% [in justified cases up to 50%]
    - EU top-up based on Horizon Europe eligible costs, including financial support to third parties

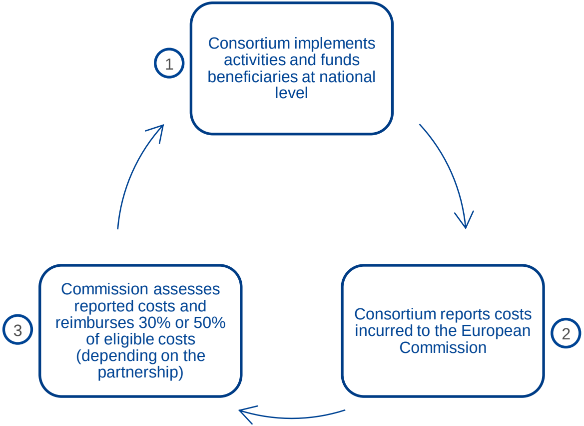
European Commission

Co-funded European Partnerships (II)

Preparation

1. Participating States (PS) and the Commission set the priorities for the partnership
2. Budget of the partnership is established → request for national commitments
3. Call topic is published in the Work Programme
4. Grant Agreement is signed with a consortium of PS that will implement the partnership

Implementation



Cycle repeats until the end of the partnership

What does the future hold?

- Legal package adopted in July 2025, interinstitutional negotiations ongoing:
  - **Proposal for a regulation** establishing Horizon Europe including the rules for participation and dissemination (as required by the Treaty)
  - **Specific programme** to implement 'Horizon Europe' (as required by the Treaty)
- Key elements:
  - Strong portfolio dimension in the selection of future partnerships
  - Streamlining and consolidating the current landscape
  - Simplifying the toolbox
  - Ensuring reciprocity by partners through tangible contributions
  - Harmonised rules and procedures

Further resources

- European Partnerships website on europa.eu
- ERA Learn
- RTD-EUROPEAN-PARTNERSHIPS@ec.europa.eu

Thank you!

Legal and financial requirements for co-funded European Partnerships

Implementing co-funded European Partnership workshop

Bartosz Majewski (DG RTD H.1)

Dominika Trzaska (REA B.2)

Gianmaria Maule (REA B.2)

European Commission

DISCLAIMER

The views and opinions expressed in this presentation are those of the presenters 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.

European Commission

Content of today's presentation

- Legal base
- AGA
  - Participation modes
  - Eligible costs
- FSTP/joint calls: core obligations (evaluation, CoI)

When & What

- Co-funded partnerships are the evolution of ERA-NET Cofunds under H2020.
- The specific rules for Co-funded Partnerships apply to certain HE Programme Co-fund types of action (i.e. calls with COFUND ToA).

What is a programme co-fund action?

Horizon Europe Regulation, Art.2(36):

‘Programme co-fund action' means an action to provide **multi-annual co-funding to a programme of activities** established or implemented by **legal entities managing or funding R&I programmes**, other than Union funding bodies; such a programme of activities may support networking and coordination, research, innovation, pilot actions, and innovation and market deployment actions, training and mobility actions, awareness raising and communication, dissemination and exploitation, and provide any relevant financial support, such as grants, prizes and procurement, as well as Horizon Europe blended finance or a combination thereof. The programme co-fund action may be implemented by those legal entities directly or by third parties on their behalf.

→ Usually implemented through two streams of activities: **Joint calls** (i.e. financial support to third parties) and **additional activities**

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Providing financial support vs implementation of transnational projects by the beneficiaries

- A core part of Co-funded Partnerships is to provide **financial support to third parties** (FSTP)
- FSTP = the EU support received via the Co-funded Partnerships grant is passed on to recipients that are not party to the GA (also called ‘cascade funding’)

European Commission → *Cofunded Partnership Grant* → Beneficiary → *Provides the financial support* → Final recipient — *Implements the project*

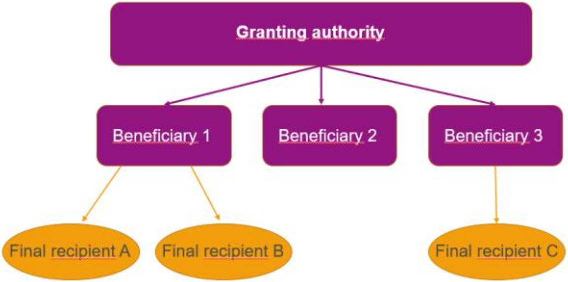
What is FSTP / cascade funding ?

Financial support from beneficiaries **to** (one or more) **recipients that are not party to the EU Grant Agreement** (third party).

Grants i.e., financial donation to **natural persons** (e.g.
allowance, scholarship, fellowship) **or legal persons** (e.g. non-repayable financial assistance to local NGOs)

Prizes are given on the basis of a contest organised by the beneficiary.

Under any grant (RIA, IA, CSA)



Legal Framework – in brief

Financial Regulation

2018/1046

- Article 204
- Article 206 (prizes)

General Annexes

He Main WP

- General Annex B
- General Annex G

MGA

- Article 6.2.D.1
- Article 9.4
- Annex 5 – Specific Rules on Co-funded Partnerships

Legal Framework – Rules and conditions

Financial Regulation 2018/1046

Art 204

In particular:

No margin for discretion if the grant agreement specifies the following:

a) the maximum amount that can be paid to a third party **which shall not exceed EUR 60 000*** and the criteria for determining the exact amount;

b) the different types of activities that may receive such financial support, on the basis of a fixed list;

c) the definition of the persons or categories of persons which may receive such financial support and the criteria for providing it.

*may be exceeded where achieving the objectives of the actions would otherwise be impossible or overly difficult

General Annex B

In particular:

- ❑ *The **specific call conditions** must explicitly **allow for it***
- ❑ *The applicants must clearly **describe the objectives and the expected results**, via the application template dedicated part;*
- ❑ *projects must **publish their open calls widely** and adhere to **EU standards of transparency, equal treatment, conflict of interest and confidentiality**;*
- ❑ *all calls for third parties and all calls that are implemented by third parties must be **published on the Funding & Tenders Portal, and on the beneficiaries' websites**; the calls must remain **open for at least 2 months;***
- ❑ *the calls must have a clear **European dimension***

Art 6.2.D.1

&

In particular:

- *Costs […] are eligible, if and as declared eligible in the call conditions, if they fulfil the general eligibility conditions, are calculated on the basis of the costs actually incurred and the support is implemented in accordance with **the conditions set out in Annex 1**.*
  - → **These conditions must ensure objective and transparent selection procedures (and reflect those mentioned in the Financial Regulation Art 204).**
- *Extension of obligations under the Grant Agreement to final recipients.*

European Commission

Legal Framework

In the context of Co-funded partnerships, there are some specific rules set out ALSO in the General Annexes of the Work Programme (Part B), setting the minimum of conditions to be fulfilled where FSTP.

Co-funded Partnerships are ALSO subject to the rules for recipients of financial support in Article 9.4.

The Annex 5 provisions focus ONLY on the cascading scenario (i.e. where beneficiaries provide financial support to third parties; so-called ‘co-funded calls’). For transnational projects implemented by the beneficiaries themselves (as part of the action), the standard rules of the Grant Agreement apply.

Extension of obligations under the Grant Agreement to final recipients

- The implementation of the transnational projects by final recipients will follow in principle the rules of the grant agreements they sign with the beneficiaries.

- In all cases, the beneficiaries must ensure that the final recipients comply with certain **obligations from the EU grant.**

- It is the **beneficiaries' responsibility** to ensure that these obligations are respected by the final recipients

  -Avoiding conflict of interest (see Article 12)
  -Confidentiality and security obligations (see Article 13)
  -Ethics (see Article 14)
  -Give visibility to the EU funding, as appropriate (see Article 17.2)
  -Respect specific rules for the action implementation (see Article 18)
  -Information obligations (see Article 19)
  -Record-keeping (see Article 20)

- Moreover, the beneficiaries must also ensure that the bodies mentioned in Article 25 (e.g. granting authority, the European Court of Auditors (ECA), the European Anti-Fraud Office (OLAF)) have the right to carry out checks, reviews, audits and investigations on the recipients, and in particular to audit the payments received.

Cascaded Calls (1)
Annex 5 of the Horizon Europe MGA

Annex 5 of the HEU Model Grant Agreement contains specific rules for implementing Co-funded Partnerships. See page 416 of the Annotated Grant Agreement for more details.

Annex 5 outlines the **mandatory conditions** for implementing Financial Support to Third Parties and / or financial support through implementing partners, including:

- **Conflict of interest** avoidance, principles of **transparency**, **non-discrimination** & **sound financial management**,
- Types of activities and categories of person to be supported,
- Selection process and use of the standard Horizon Europe award criteria
- Proper governance and oversight.

Non-compliance with the mandatory rules and / or specific aspects of the grant agreement for a given project / partnership can lead to **cost rejection**.

Cascaded Calls (2)

- Cascaded projects should be selected for funding following a **joint transnational call for proposals**.
- To be eligible, **cascaded projects must be trans-national**, i.e. at least two independent legal entities from two different Member States or Associated Countries or one legal entity from a Member State or Associated Country and one legal entity from a non-associated third country (not receiving financial support).
- The consortium must **publish the joint call(s) on the Funding and Tenders portal** (and the partnership / partner websites).
- The joint / co-funded call(s) must be kept open for at least **2 months**.
- The selection must follow a **two-step procedure**, with
    - Step 1: eligibility check / review at national or trans-national level, and
    - Step 2: single international peer review.

    A two-step procedure is necessary to ensure that only entities that are eligible for funding under the national funding rules are invited to Step 2 and that consortia can balance the requested funding and available funding per participating Member State and associated country between Steps 1 and 2.
- In Step 2, proposals must be evaluated with the assistance of at least **three independent experts** per proposal.

Cascaded Calls (3)

- **The evaluation must use the same award criteria as Horizon Europe calls: Excellence, Impact, Quality and Efficiency of the Implementation (see details for Cofund actions under Part D of the Horizon Europe Work Programme General annexes)** [General Annexes 2026-27]

- The selection procedure must be followed by an **independent expert observer** who must make a report. That report is a mandatory deliverable.

- Proposals must be ranked according to the evaluation results.

- The selection of trans-national projects ('joint selection list') must be based on the order of the **ranking list** (or the ranking lists, if there are different topics).

- The consortium must foresee to provide information about the co-funded call and projects in the correct template / format to allow for **data transfer** to Commission IT system.

- The proposal must specify the **maximum amount** of financial support to a third party (grant beneficiaries under national funding rules) and the **criteria** for determining the exact amount under national funding rules.

European Commission

Types of participants

Beneficiaries

- Sign the GA, have all the rights and obligations

Affiliated Entities

- Have a legal or capital link to beneficiaries. Carry out work in the project and declare costs

Other participants involved in the action

- Associated partners: Work for the Action but can NOT declare costs

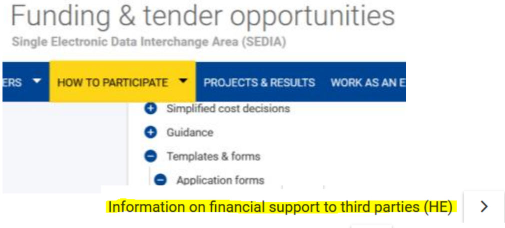
- Subcontractors: Work on action tasks and invoice the beneficiary/affiliated entity

- Third parties providing contributions: Make available some of their resources to a beneficiary (in-kind contributions) who can declare the cost

- Recipients of FSTP: Financial support given to them is part of an action task, to be declared as FSTP cost by a beneficiary

Important aspects - at proposal stage

- The applicants must clearly **describe the objectives and the expected results**, via the application template dedicated part (General Annex B).
- when the calls allow for FSTP, the applicants must add the ‘Information on financial support to third parties’ form to their application.



2. contain the following specifications (as a minimum):

   a) the maximum amount of financial support for each third party; this amount may not exceed 60 000 EUR, unless explicitly mentioned in the Work Programme topic. If your project requires a higher amount per third party than the threshold amount set in the call conditions, justify and explain why this is necessary in order to fulfil your project's objectives.

   b) the criteria for calculating the exact amount of the financial support

   c) the different types of activity that qualify for financial support, on the basis of a closed list

   d) the persons or categories of persons that may receive financial support, and

   e) the criteria for giving financial support

At proposal stage

- Before the signature of the Grant Agreement, the granting authority **must control and agree** with the FSTP scheme proposed by the applicants.

- **All this information will be reflected in the DoA (Annex 1).**

Third parties – eligibility

- Entities based in non-associated countries may receive financial support through FSTP calls, provided that the FSTP scheme, and in particular **the persons or categories of persons that may receive financial support,** complies with the conditions and specific rules enacted in the particular Work Programme in the call for proposals, and that it is not aimed at circumventing Horizon Europe funding rules.

- The selection procedure and criteria for providing FSTP must be decided **by the beneficiaries** and explained already in their proposal.

Beneficiaries may decide at proposal stage that legal entities based in a non-associated third country are not eligible to receive FSTP.

Third parties - eligibility

To keep in mind:

- Restrictions on participation in Innovation Actions *(China).*
- EU restrictive measures *(Article 29 of the Treaty on the European Union (TEU) and Article 215 of the Treaty on the Functioning of the EU (TFEU)20 as well as Article 75 TFEU).*
- Legal entities established in Russia, Belarus, or in non-government controlled territories of Ukraine.
- Measures for the protection of the Union budget against breaches of the principles of the rule of law in Hungary *(Hungarian public interest trusts established under the Hungarian Act IX of 2021)*.

Conflicts of interest

In principle, beneficiaries (member of the consortium) to the EU grant can NOT also be final recipient of FSTP. However, there are cases where exceptions are permitted, under certain conditions.

- To make the funding of beneficiary RPOs through FSTP possible, they shall not take part in work streams connected to the preparation of FSTP actions.

- These exceptions should be read in the specific rules set out in ANNEX 5 of the MGA i.e., measures to avoid potential conflicts of interest or unequal treatment of applicants must be ensured (notably through appropriate communication/exchange of information channels and independent and fair complaints procedures).

Annotations on measures to avoid conflict of interest

In practical terms, the consortium is asked to:

- Present a clear list of **beneficiaries** (or department of a beneficiary) that will have the **responsibility of drafting call texts**, and managing the award procedure
- Identify the **beneficiaries** (or other departments of the same beneficiary) **which can apply** for funding under the co-funded call for proposals
- Explain the **measures* to mitigate** (potential) conflict of interest or unequal treatment of applicants
- Reflect this fully in their DoA Annex 1, both in the context of the description of the co-funded call and in relation to the monitoring of the transnational projects.
- If needed, beneficiaries must set up **information barriers*** ('firewalls') to prevent exchanges or communication that could lead to conflicts of interest or unequal treatment of applicants and ensure independent and fair complaints procedures.

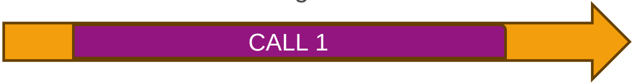
* Those measures will have to be approved by the Executive Agencies managing the relevant grant agreements.

Cluster 6 COFUND Partnerships

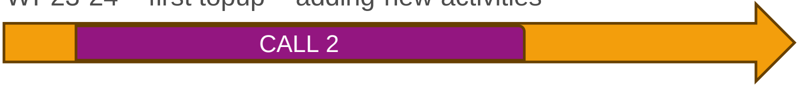
ACRONYM	Title	Initial funding WP	Status
BIODIVERSA	The European Biodiversity Partnership	2021	2nd topup in WP 2025
Water4All	Water Security for the Planet (Water4All)	2021	2nd topup in WP 2025
SBEP	A climate neutral, Sustainable and productive Blue Economy Partnership	2022	1st topup in WP 2024
AGROECOLOGY	European partnership on accelerating farming systems transition – agroecology living labs and research infrastructures	2023	1st topup in WP 2025
EUPAHW	European Partnership for Animal health and Welfare	2023	1st topup in WP 2025
FutureFoodS	European partnership for a sustainable Future of Food Systems	2023	1st 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 (example)

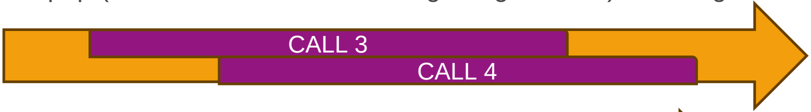
- Phase 1 – WP21-22 – initial grant



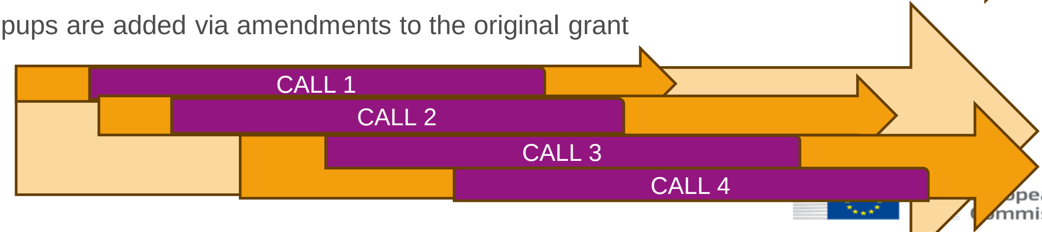
- Phase 2 – WP23-24 – first topup – adding new activities



- 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)

European Commission

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 **additional** 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.

European Commission

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

European Commission

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.

European Commission

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 ≥ 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

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**.

European Commission

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 musts 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**

European Commission

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!

Thank you!

European Commission

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

European Commission

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What is the work of a co-funded partnership

Call management and additional activities

10 September 2026

ERA LEARN

There are two types of partnership activities:

- **Joint calls** for proposals 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** 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.

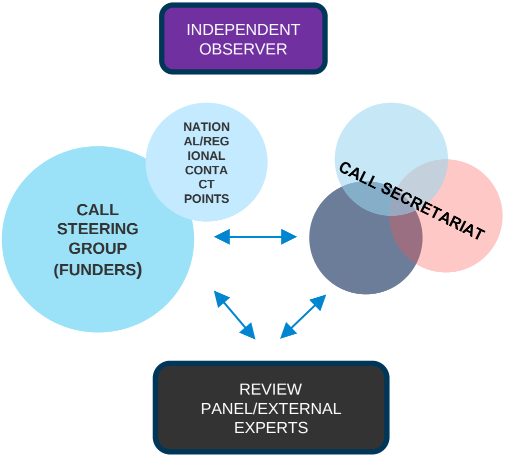
Joint Transnational Calls

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

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 preparation and governance



DOCUMENTS & TOOLS:

- ❑ Call documentation (including description of the topic, general requirements and criteria, national/regional eligibility requirements, guidelines for applicants, information on management of funded projects)
- ❑ Procedures of the call
- ❑ Guidelines for reviewers
- ❑ Memorandum of Understanding
- ❑ Submission and evaluation system
- ❑ Partner search tools

Example of a call evaluation and selection process

Supporting measures in calls

Fostering a more inclusive, collaborative and impactful research

- Promoting early career researchers
- Widening/inclusiveness measures and geographical diversity in project consortia
- Supporting collaboration among different types of stakeholders
- Fostering interdisciplinarity
- Promoting the use of existing research infrastructures
- Promoting open access publishing and open data
- …

For more more information, please consult: *ERA-LEARN report on Inclusiveness In European R&I Partnership*

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Budget for transnational calls

CHALLENGE:

Uneven national budgets: Predefined national budgets may not match the actual demand resulting from the final ranking of proposals, creating funding gaps or unused budget capacity across beneficiaries.

Efficient use of the top-up: The challenge is to ensure an efficient and targeted use of the additional EU contribution (top-up) to fill identified funding gaps and maximise the number of funded projects.

Different funding rates: Flexible allocation of the EU contribution may result in different effective FSTP funding rates across beneficiaries, requiring clear rules to ensure fairness, transparency, and a balanced overall allocation.

Maximising the Outcomes of the Call

Proposal Submission

- Align national budget allocations with the capacity and demand of the research community to minimise over-subscription
- Introduce mechanisms to address under-subscription after the pre-proposal stage, for example by allowing applicants from under-subscribed countries or regions to join consortia invited to submit full proposals
- Encourage funding agencies facing oversubscription to increase available budgets both after the pre-proposal stage and after the final ranking list of projects recommended for funding

Call Financial Management

- Ensure that top-up funding is distributed using a balanced approach that combines juste retour principles with gap-filling

Proposal Selection

- Incorpoate selection criteria that encourage participation from countries and regions with available funding, including Widening countries where relevant
- Consider budget negotiations with consortia of funded projects

Additional activities (1)

Additional activities are activities undertaken by the partnership beyond the implementation of joint calls, aimed at supporting the achievement of its strategic objectives and generating added value at European level

Examples:

- networking and community-building;
- workshops, conferences and seminars;
- training and capacity-building;
- knowledge dissemination and uptake;
- policy support and coordination;
- development of standards, methodologies or tools;
- monitoring and evaluation;
- cooperation with other European Partnerships and EU initiatives.

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Development of the Additional Activities Catalogue

Example from STAR Partnership*

Process of developing additional activities to support the uptake of research and stakeholder engagement

M1-4
Desk research
to identify good practices and gaps in impact generation, stakeholder engagement, and evidence-informed policymaking (source: reports, other projects, scientific literature)

M3
Stakeholder workshop
(online)
involving policymakers, researchers, NGOs, think tanks, and trade unions to identify stakeholder roles, needs, barriers, enabling factors, and potential support instruments.

M4
Draft catalogue
based on desk research and the workshop, translating stakeholder insights & good practices into practical activities focused on co-creation, knowledge translation, matchmaking, communication, and impact.

M5
Validation workshop
(in person)
with ministries, agencies, research organisations, NGOs,and the European Commission to review and refine the proposals, indentify success conditions, risks and mitigation measures

M6
Final catalogue includes 6 supportive activities, while 3 activities were integrated into project-level requirements as more effective implementation mechanisms.

Activities with activity cards describing objectives, main target groups, potential implementation risks, and expected effects.

*European Partnership on Social Transformations and Resilience

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Thank you.

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Internal financial arrangements

Roland Brandenburg (ERA-LEARN)

ERA
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Co-funded Partnerships in Horizon Europe: financial basics

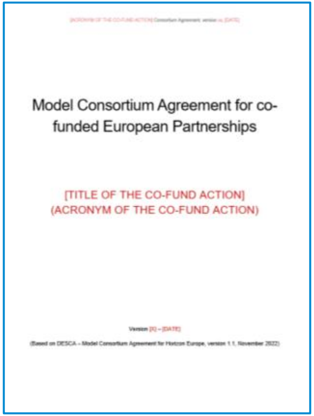
- Co-funded Partnerships implement a **joint work programme** agreed between the EC and the consortium which defines the planned activities
- Co-funded Partnerships receive **EU co-funding at a funding rate defined in the Grant Agreement** (typically 30%)
- the EU contribution is **generated by eligible 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 for co-funded European Partnerships

[TITLE OF THE CO-FUND ACTION]
(ACRONYM OF THE CO-FUND ACTION)

Version [X] – [DATE]

(Based on DESCA – Model Consortium Agreement for Horizon Europe, version 1.1, November 2022)

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

ERA-LEARN Guide on co-funded European Partnerships (publ. 2/2026)

Table of Contents

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

3 main approaches:

1) reimburse different cost categories at different rates by internal re-shuffling of EU contribution

2) cover gaps in the Joint Calls selection lists with different funding rates for different beneficiaries

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

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

Standard:
30% funding rate (EU contribution) for all cost categories

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

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

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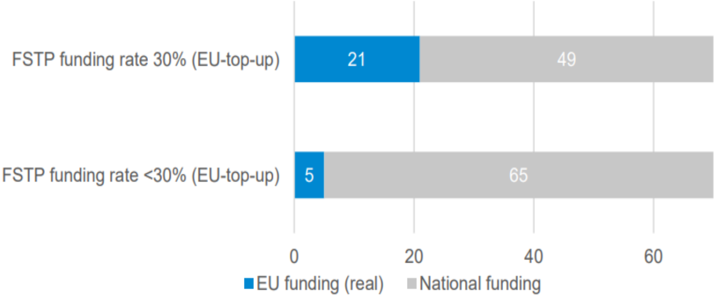
Case 1: lower funding rate for FSTP → higher national contributions needed

Standard split:
funding rate 30% (EU funding)
→ 49 mio € national contribution needed

Internal agreement:
funding rate <30% (EU funding)
→ 65 Mio € national contribution needed



Note: the overall reported costs must be identical in both scenarios (100 Mio €) to receive the same EU contribution.

Funded by the European Union

Case 1: reduced EU funding in case of reduced reported costs (FSTP)

<u>Attention:</u>

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

→ report the **real** funding transferred to the transnational projects (70 Mio €)

→ **do not** report the **committed** national contributions (65 Mio €) or estimated costs

Case 2: use of EU contribution to cover gaps in the selection list

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 committments 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

Case 2: financial flexibility suggested through mixed funding mode

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

Nr	proposal ID	Proposal acronym	requested funding	Evaluation score	EC top-up needed to fill gap
1	A1	Test Projec	838394	13,5	0
2	A2	Test Projec	660000	13,5	0
3	A3	Test Projec	645000	13,5	0
4	A4	Test Projec	1520920	13	[illegible]
[illegible]	A5	Test Projec	377125	13	[illegible]
6	A6	Test Projec	648500	13	-973 064
7	A7	Test Projec	376762	[illegible]	-973 064
8	A8	Test Projec	515428	[illegible]	-973 064
9	A9	Test Projec	900000	12,5	-973 064
10	A10	Test Projec	[illegible]	12,5	-973 064
11	A11	Test Projec	[illegible]	12,5	-973 064
12	A12	Test Projec	[illegible]	12,5	-973 064
13	A13	Test Projec	[illegible]	12,5	-973 064
14	A14	Test Projec	1162000	12,5	-1084 832
15	A15	Test Projec	575430	[illegible]	-1084 832
16	A16	Test Projec	694969	[illegible]	-1084 832
17	[illegible]	Test Projec	611800	12,5	-1084 832
[illegible]	A18	Test Projec	462969	12,5	[illegible]
19	A19	Test Projec	331172	12,5	[illegible]

!

Agency 1	Agency 2	Agency 3	Agency 4	Agency 5	Agency 6	Agency 7
0	0	0	0	0	0	[illegible]
0	0	0	0	0	0	[illegible]
0	0	0	0	0	0	0
0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	0	0	-769 520
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0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	[illegible]	0	-769 520
0	-203 544	0	0	[illegible]	0	-769 520
0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	0	0	-769 520
0	-203 544	0	0	-163 094	0	-769 520
0	-203 544	0	0	-163 094	0	-769 520

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

Practical example:

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: internal flexibility on cost categories & share of FSTP

- 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**

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Case 3: costs reported to EU and flexible real distribution of EU contribution

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%					

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**

ERA LEARN

www.era-learn.eu

Support & guidance:

https://www.era-learn.eu/support-for-partnerships

Guide on co-funded European Partnerships: an essential introduction for newcomers

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Tools provided by ERA-LEARN

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

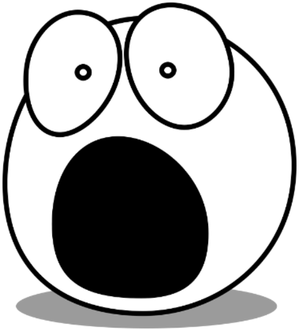
Christiane Wehle (ERA-LEARN)

ERA
LEARN

- Overview on ERA-LEARN tools
- Most relevant information and tools described in Newcomer‘s Guide and picked up by stakeholders

“If only I had known!!!“

… don‘t let this happen to you!



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): H2020 legacy

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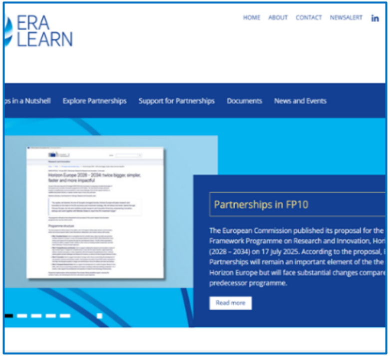
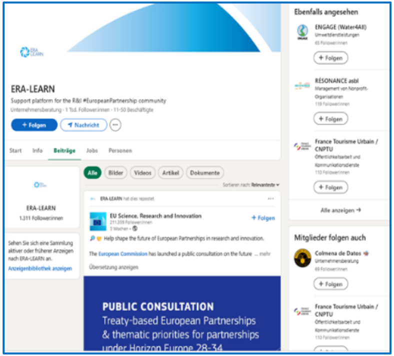
Communication channels – how we provide information

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

Newsalert
(3500 recipients)

LinkedIn
(1300 followers)





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

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Tools especially valuable for co-funded European Partnerships

Ref. preparation, implementation, governance, call management, financial management, additional activities…

- ERA-LEARN Partnership Database
- Joint Calls Database / Calendar
- Call Management Manual + Templates
- Model Consortium Agreement for Co-funded Partnerships
- Project Data Collection Templates
- RIPE Toolkit
- Monitoring & Impact Assessment Guidelines/Tools
- Good-Practice-/Guidance-collection
- Help Center
- Trainings, Workshops and Events (incl. Proceedings, ppt and Q&A)
- Newsletter / LinkedIn

ERA-LEARN GUIDE on co-funded European Partnerships:
An essential introduction for newcomers era-learn_newcomers_guide.pdf

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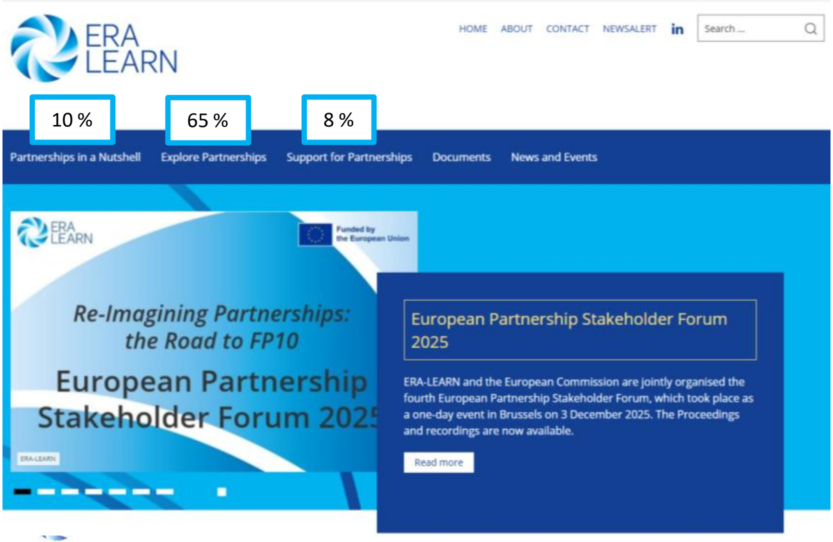
Central information hub: the ERA-LEARN portal

ERA LEARN https://www.era-learn.eu



- **Partnerships in a nutshell**
  - Strategic Coordinating Process
  - Types & Portfolio
- **Explore Partnerships**
  - Networks
  - Countries/ organisations
  - Thematic clustering
  - Calls
- **Support for Partnerships**
  - Governance & financial issues
  - Joint calls
  - Additional activities
- **Documents**
  - Annual & Country Reports
  - Guidelines
  - External documents
- **News & events**
  - Incl. Recordings/ FAQs

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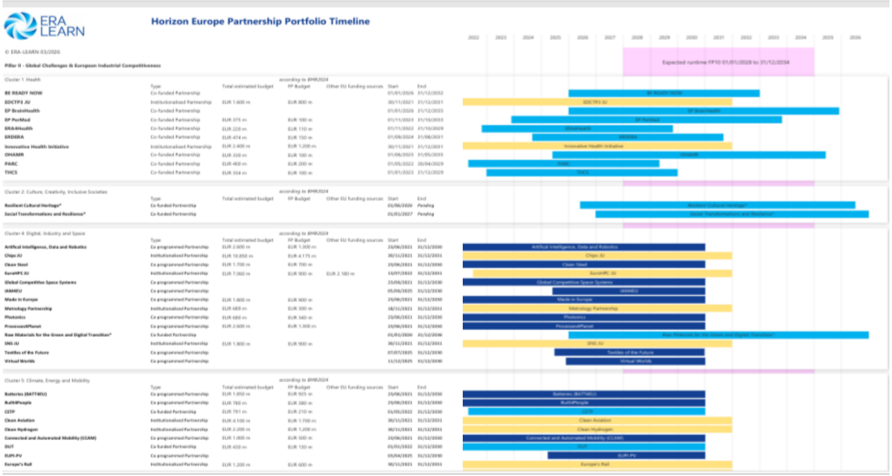
Observations: Tools and support found most relevant by community

Mostly asked for – Partnerships in a nutshell: Partnership in FP10 and Partnership Portfolio

- Understand the instrument, relevant processes and timelines
- Be informed on developments and negotiations towards FP10
- Use graphic to inhale Partnership portfolio



2026_03_24_Horizon Europe Partnership Portfolio Timeline

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Observations: Tools and support found most relevant by community

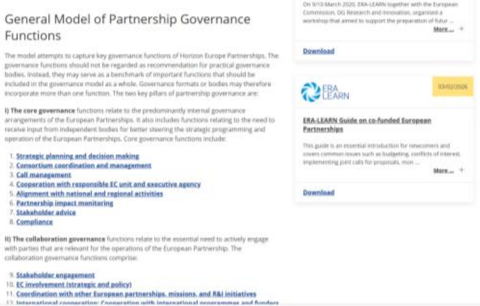
Mostly asked for - Support for Partnerships:

- Governance/ administration:
    - 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 funtions in co-funded Partnerships

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

ERA LEARN [Governance Models of Horizon Europe Partnerships — ERA-LEARN]



General Model of Partnership Governance Functions

The model attempts to capture key governance functions of Horizon Europe Partnerships. The governance functions should not be regarded as recommendation for practical governance bodies. Instead, they may serve as a benchmark of important functions that should be included in the governance model as a whole. Governance formats or bodies may therefore incorporate more than one function. The two key pillars of partnership governance are:

I) The core governance functions relate to the predominantly internal governance arrangements of the European Partnerships. It also includes functions relating to the need to receive input from independent bodies for better steering the strategic programming and operation of the European Partnerships. Core governance functions include:

1. Strategic planning and decision making
2. Consortium coordination and management
3. Call management
4. Cooperation with responsible EC unit and executive agency
5. Alignment with national and regional activities
6. Partnership impact monitoring
7. Stakeholder advice
8. Compliance

II) The collaboration governance functions relate to the essential need to actively engage with parties that are relevant for the operations of the European Partnership. The collaboration governance functions comprise:

9. Stakeholder engagement
10. EC involvement (strategic and policy)
11. Coordination with other European partnerships, missions, and R&I initiatives

On 9/10 March 2020, ERA-LEARN together with the European Commission, DG Research and innovation, organised a workshop that aimed to support the preparation of futur ...

More ...

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ERA-LEARN Guide on co-funded European Partnerships

This guide is an essential introduction for newcomers and covers common issues such as budgeting, conflicts of interest, implementing joint calls for proposals, mon ...

More ...

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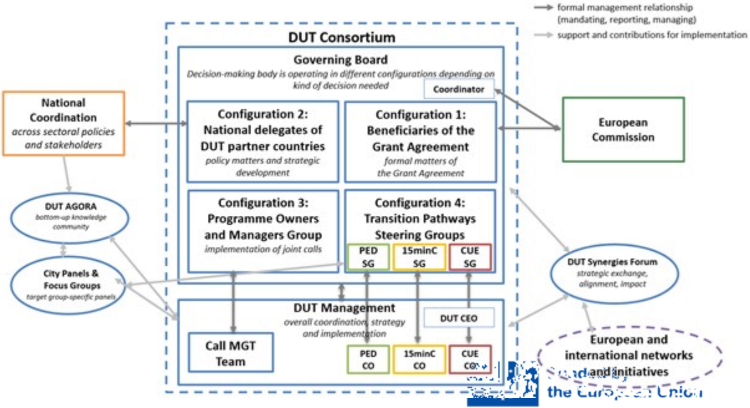

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Model consortium agreement for co-funded European Partnerships

ERA LEARN [Agreements — ERA-LEARN]

Governance, Administration & Legal Base

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

Agreements

add to pdf

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

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10/10/20…

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 ... +

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Joint Call Manual

[Implementing Joint Calls — ERA-LEARN](#)

Support for Partnerships

Home / Support for Partnerships / Implementing Joint Calls

Implementing Joint Calls

add to pdf

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.

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.

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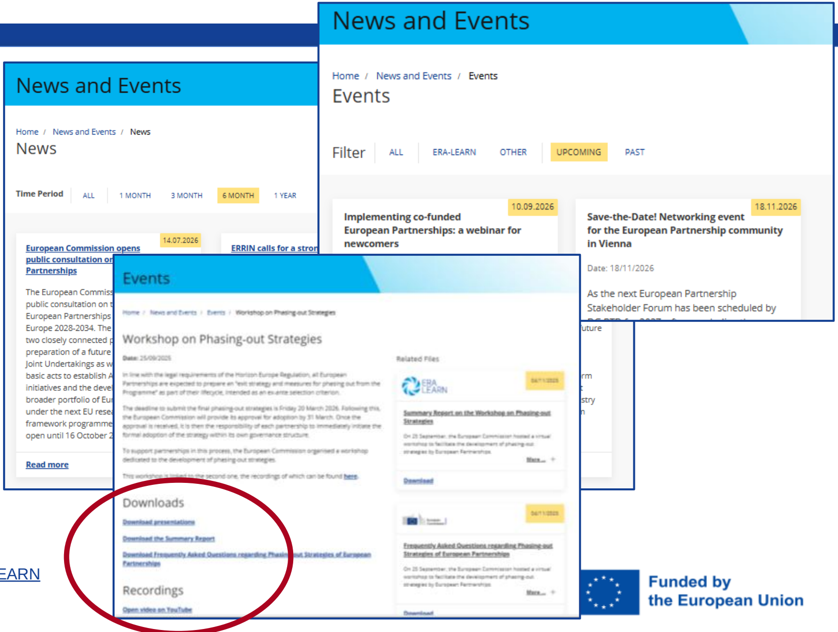
Observations: Tools and support found most relevant by community

Mostly asked for - News and events

- Two of most relevant ERA-LEARN activities to reach out and inform actors
- Stakeholder Forum and Newcomer Workshop among the most attractive events/ workshops
- Proceedings/ FAQs/ recordings helpful for further support



[News and Events — ERA-LEARN](#)

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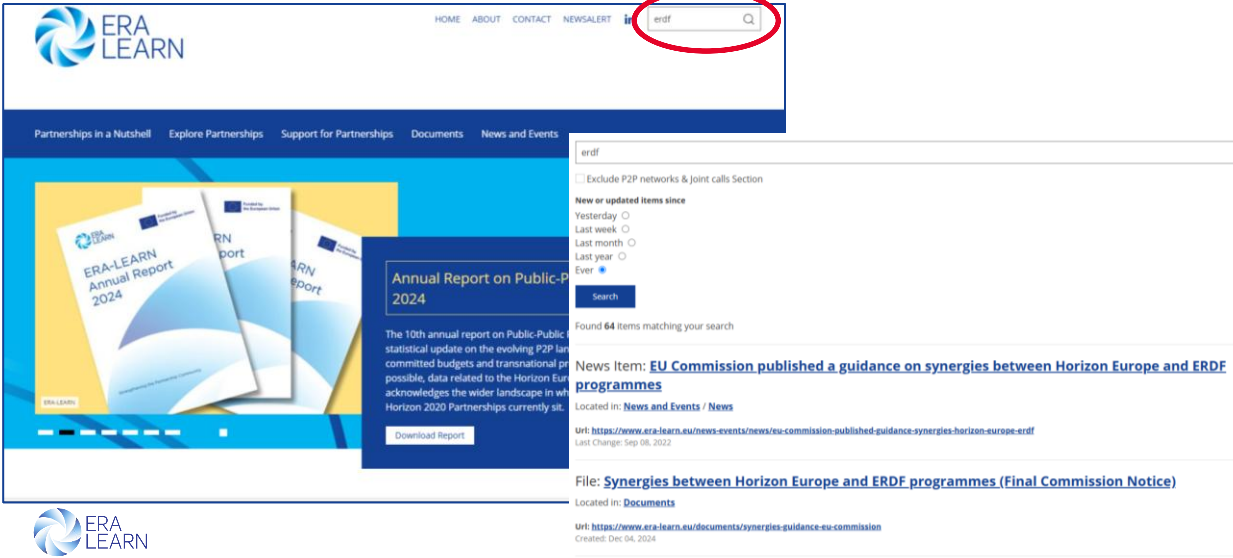
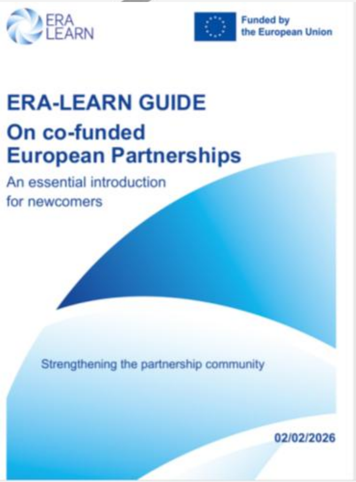
When in doubt, search it out…



You may forget almost everything but…

era-learn_newcomers_guide.pdf



- Background information on Partnership landscape.
- Governance bodies and roles, Agreements, financial management and internal procedures.
- Joint call management and additional activities, reporting, monitoring and evaluation.
- More to know on knowldege valorisation and phasing out.
- Illustrations, examples and links to further guidance and information.

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Thank you!

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