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Q&A Summary

Webinar on data transfer for co-funded partnerships, Article 185 initiatives and the EIT KICs

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Q&A Summary of the webinar on data transfer for Co-funded Partnerships, Article 185 Partnerships and the EIT KICs

The recent webinar, organised by the European Commission and supported by ERA-LEARN, focused on clarifying the requirements and procedures for data transfer for the co-funded partnerships, Article 185s and EIT-KICs under Horizon Europe. This was arranged in response to the various challenges encountered by the partnerships in addressing the requirement to systematically gather detailed proposal and project-level data, including for both funded and unfunded proposals.

The webinar highlighted the broader monitoring framework context mandated under Article 50 of the Horizon Europe regulation, which requires the integration of comprehensive data from all proposals and funded projects into the centralised CORDA database. Unlike the previous Horizon 2020 framework, which had a more fragmented and manual reporting process, managed through separate Excel-based submissions, Horizon Europe aims to streamline data collection through standardised, structured XML templates.

Significant attention was given to explaining the rationale behind collecting extensive data on unfunded proposals, which was not previously required under Horizon 2020. The Commission emphasised that this practice provides valuable insights into success rates, impacts on various stakeholder groups, and demographic outreach, thus enhancing policy evaluation and improving future funding strategies.

The technical sessions detailed the structured data collection methods and highlighted the importance of compliance with XML standards, the use of SFTP servers for secure data transfer, and validation mechanisms to ensure data quality. The webinar also introduced an upcoming results-oriented data template being designed to capture project outcomes such as publications, intellectual property rights, communication activities, and research team profiles. This new template aligns closely with existing Horizon Europe periodic reporting guidelines to minimise additional administrative burdens and further details will be communicated in due course.

Participants raised practical concerns regarding technical complexities, such as the mandatory PIC for entities involved, even at early proposal stages, and the challenges of adapting established internal data reporting systems to the new EU templates. Concerns were also expressed about the availability of adequate technical expertise and human resources within partnerships to comply with these rigorous reporting requirements.

In response, the European Commission acknowledged the practical difficulties faced by partnerships and discussed ongoing efforts to simplify processes where possible, reduce the risk of double reporting, and provide clearer guidance. The Commission encouraged continued dialogue and collaboration with partnerships to ensure smoother data integration and better alignment of internal reporting tools with EU monitoring frameworks.

The following section documents the key questions raised and the responses provided by the Commission.

General aspects

Q: Why is data collected on proposals that are not funded?

A: Data on proposals and their results is essential to meet the requirements of Horizon Europe's general monitoring framework, otherwise we are missing important pieces of the puzzle (success rates, impact, etc.). We are trying, where possible, to simplify the process and avoid double reporting, as well as adjusting and tweaking the templates as we go based on feedback from the partnerships.

Q: In addition to this data submission process, co-funded partnerships are expected to record the same data in the Funding &Tenders (F&T) portal (continuous reporting). Is there a way to automatically transfer the data into the F&T portal?

A: To reduce administrative burden, we are exploring whether FSTP reporting via Sygma for co-funded partnerships could be waived or simplified in the future. In the meantime, and at least until the data transfer process is fully operational and reliable, Sygma reporting will remain in place. Further information will be communicated soon.

Q: The EIT KICs currently provide the data to the EIT and so will they now be obliged to submit the data on two different platforms?

A: The EIT KICs should continue to provide the data to the EIT, which will then push the data to the Commission systems to ensure everything is streamlined and that there is no duplication of effort for the KICs.

Q: Can the e-grant system of the COM be used for partnerships to simplify the data collection and submission process?

A: Co-funded partnerships do not use the Commission's corporate IT tools and are not integrated into the system. While some partnerships (e.g. Joint Undertakings) do use these systems against payment, there is no possibility for co-funded partnerships to be able to use them within Horizon Europe 20210-2034. The Commission is reflecting on the situation for the future as several co-funded partnerships have enquired about using the Commission tools including the F&T portal for proposals submission, evaluations and administration of the grants.

Q: Are specialist skills needed to deal with the requirements of the data submission process?

A: There are technical skills required to structure and submit the data in the required format and this should not be underestimated. Skilled people who understand XML is important. It can be a very resource-intensive process and may be more complex than originally anticipated and so sufficient resource should be allocated to these activities.

Q: Does the EIT have a centralised approach to common activities such as data collection?

A: From the EIT partnership side, there are 'Cross-KIC activities' where resources are pooled together for common challenges/projects and are funnelled through a common grant. One of them is the 'Cross KIC Shared Services' providing an Excellence Centre to share practices and, when possible, centralised work for better (and cheaper) results. This is done for audits, subgrantee onboarding and background checks. Currently it is being extended to common IT solutions and cost controls.

Q: Will the reporting template be available soon? What are the requirements and what kind of data do we need to request from the projects?

A: The new template will be fully aligned with regular Horizon Europe reporting e.g. the periodic reporting template. It is being designed so that many fields will be optional to make the process as easy as possible for partnerships, particularly those already addressing this requirement. Some work is still being done within the Commission to finalise the template, and no specific date can, as yet, be provided regarding its release. Efforts will be made to communicate clearly and as early as possible to allow adjustments to be made as necessary.

The Commission acknowledges that some partnerships have already started to prepare the internal reporting templates and would be happy to receive copies of these to help ensure the new template is comprehensive but easy to work with.

Technical aspects of the submission system

Q: Is it possible to omit the PIC for participants in proposals that were not funded, especially since, initially, it was not mandatory at the pre-proposal stage? It is very resource-intensive and impractical to retrospectively collect this data from proposals that were never funded.

A: The PIC is currently mandatory. It is still possible to register the participant in the F&T Portal and request a PIC. The Commission acknowledges that this requirement poses practical issues for many partnerships and is considering how it might be overcome. At this time, however, it is not possible to omit the PIC.

Q: Is it possible to have a testing and validation tool for XML files before submission?

A: There are many readily available tools that allow XML vs XSD validation (e.g. notepad++) and that have proved to be effective for partnerships.

Q: During the submission process, can mistakenly submitted XML files be deleted?

A: Yes, it is possible. Mistakes can be corrected upon request via email (functional mailbox: rtd-egdr-dataimport@ec.europa.eu).

Q: Can keys be generated by participants themselves for secure file transfer (SFTP) to avoid sharing private keys?

A: Partnerships generating their own keys and sharing only public keys is not possible under the current setup. This raises concerns about key security and so partnerships should discuss their specific requirements with the Commission if an alternative approach is needed.

Q: How should participant EU contributions for co-funded partnerships be reported, given that funded projects don't directly receive EC funding?

A: Participant EU Contribution: This is the exact amount of EU funding formally allocated to each participant directly within the grant agreement.

Net EU Contribution: This represents a participant's share of EU funding minus any amounts that are forwarded or assigned to their linked third parties, as per the Commission's official definitions.

The Beneficiary/Third-Party Relationship: Both "Net EU Contribution" and "EU Contribution (contractual)" are directly tied to the relationship between a Beneficiary and one or more Third Party:

- Beneficiaries are the entities that sign the grant agreement with the Commission and are formally assigned an EU Contribution.
- Linked third parties, conversely, do not sign the agreement and therefore have an official EU Contribution of zero.

Project EU Contribution should equal the sum of all Participant (i.e., beneficiaries + third parties) NET EU Contributions, which should also equal the sum of all Participant EU Contributions without any unintended multiplications.

A full explanation can be found in the slides and within the webinar.

Q: How can partnerships deal with the issue of multiple national authorities in international collaboration projects when the underlying data model only allows one funding agency to be identified per project?

A: The Commission acknowledges this issue and is working on updating the template to allow participants to submit more than one funding agency. The updated template will be released soon.

Q: In some calls, there is a widening phase between the first and second stages, meaning that consortia can add partners at the full proposal stage. Therefore, the consortia at the pre-proposal stage may differ from those that are funded. Could the difference in composition of the consortia at the pre-proposal stage cause a problem in the system? If so, how should the data be handled?

A: In the event of any modifications, partnerships may upload an updated version of the file containing the latest data. For instance, a new partner can be added into the participants' sequence, without changing the order numbers of those already involved.

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