

Frequently asked questions – Biennial monitoring report (BMR) 2024

Common Indicators Survey

1. General questions about the BMR	2
– What is the foreseen timeline for BMR 2024?	2
• How are the stakeholders involved?	2
• The degree of details between indicators differs?	3
• What to do if some data is missing?	3
• Will there be done a follow-up for indicators over time?	3
• Are there any new indicators?	3
2. Questions regarding indicators	3
• Do we report on all common indicators in BMR 2024?	3
Indicator #1	5
• Is the required data needed at partnership or project level?	5
• #1 Baseline:	5
• #1 Progress:	6
Indicator #2	6
• It is very difficult to identify almost any type of additional investments, as nobody has the obligation to report them to the partnership?	6
Indicator #3	7
• What are the priorities selected?	8
• How the priorities were selected?	8
Indicator #6	9
• This indicator was previously not part of the common indicator survey?	9
Indicator #9	9
• It could be helpful to see what was answered under this indicator at the previous CI survey. Could that information be provided?	9
Indicator #10	10
• Thematic Focus	10
• Additional data for the mid-term evaluation of Horizon Europe	10

1. General questions about the BMR

- [What is the foreseen timeline for BMR 2024?](#)

Common indicators survey:

- Survey will be sent out in July 2023.

Country fiches:

- Pre-filled fiches will reach to MS/ACs in July - project level data from Co-Programmed and Co-funded Partnerships will be added at later stage during the review process.
- Office hours will be provided over summer (July – Aug – Sept)
- ERA-LEARN webinar is planned on the topic in September 2023
- Review process of country fiches will go on until the end of October 2023.
- Country fiches will be finalised in November 2023

Partnership fiches:

- Ongoing: Update of the contact list per partnership
- Before the end of June: initial contacts with new partnerships and partnerships with incomplete inputs (cfr. above) will be established
- During July / August: first explanatory interaction with these partnerships
- September: Launch of the updating process for all remaining partnerships
- October – November: data collection & updating process
- End of November: final partnership fiches for draft BMR

- [How are the stakeholders involved?](#)

Member states and associated countries are mainly involved via Partnership Knowledge Hub. European Partnerships are contacted directly. All the stakeholders are invited to give feedback in different steps – E.g., to the common indicator survey, to the country fiche template, to the partnership fiche template, to the BMR draft etc. Different options for the feedback are proposed (written feedback, office hours, oral feedback during the meetings, one-to-one meetings etc.). The expert group favours inclusive and transparent approach to its activities.

- [The degree of details between indicators differs?](#)

We have to differentiate the project level information and the partnership level information. For common indicators the partnership level information is asked (not project level information).

- [What to do if some data is missing?](#)

The problem of missing data unfortunately remains acute also for BMR 2024. More and more data could be gathered (for common indicators and fiches) via EC databases, but the European Partnerships and countries should also have their own monitoring systems in place, as the EC databases cannot provide (and is not designed to provide) all the information needed for all the common indicators and fiches.

- [Will there be done a follow-up for indicators over time?](#)

Currently there is not enough data to perform that kind of analysis, but it could be certainly done later in future biennial monitoring reports.

- [Are there any new indicators?](#)

No, but the order of some indicators has been changed due to technical reasons and some indicators have been adjusted according to the feedback of the European Partnerships and according to the needs of the biennial monitoring report focus areas.

NB! Please note, there are two new questions regarding the focus topics of this biennial monitoring report (questions regarding technological sovereignty and internationalisation), but these are not new separate indicators and will not be part of the next common indicator's survey.

In the 2023 survey there are also additional questions regarding the interim evaluation of the Horizon Europe (to avoid the need to have two different surveys).

2. Questions regarding indicators

- [Do we report on all common indicators in BMR 2024?](#)

No.

This first biennial monitoring report focused on presenting and analysing the following subset of 6 of the 11 common indicators:

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

- Indicator #3 Overall (public and private; in-kind and financial) investments mobilised into EU priorities (presented in Chapter 2.1, see Table 4)
- Indicator #5 Measures ensuring continuous openness and transparency and dedicated activities
- Indicator #6 Share of newcomer partners in partnerships, including geographical coverage
- Indicator #8 Share of budget dedicated to coordinated and joint activities with other European Partnerships
- Indicator #10 Share of complementary and cumulative funding from other Union or national/regional funds (national/ regional, ERDF and other cohesion policy funds, RRF, CEF, DEP).

NB! Please note that the numbering of some indicators have been changed in 2024 report due to technical reasons (in the previous report some indicators were merged). But the content of the indicators remains the same.

The second biennial monitoring report will focus on presenting and analysing the following subset of indicators:

Additionality and directionality

- Indicator #1 Progress towards (financial and in-kind) contributions from partners other than the Union - i.e., committed vs. actual contributions at contract signature [direct leverage]
- Indicator #2 Broader investments beyond the contributions from partners and triggered by the partnership that contribute to achieving their objectives
- Indicator #3 Share of total Partnership funding (public and private; in-kind and financial) mobilised into EU priorities after contract signature with the Commission
- Indicator #10: Alignment of national / regional / sectorial policies (strategic level)

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?
- Indicator #9 Visibility of the partnership in European, international policy/industry cycles

Openness and transparency

- Indicator #5 Measures ensuring continuous openness and transparency

- Indicator #6 Membership in partnerships, including geographical coverage

Coherence and synergies

- Indicator #7a Coordinated and joint activities with other European Partnerships and EU Missions
- Indicator #7b Which of the following activities do you plan to carry out jointly with other Partnerships or Missions?
- Indicator #7c synergies with other EU programmes (list of programmes)
- Indicator #7d Explain how you collaborated with these programmes
- Indicator #8 Complementary and cumulative funding from other Union or national/regional funds (national/regional, ERDF and other cohesion policy funds, RRF, CEF, DEP)

Indicator #1

Progress towards (financial and in-kind) contributions from partners other than the Union - i.e., committed vs. actual contributions at contract signature [direct leverage]

- [Is the required data needed at partnership or project level?](#)

Partnership level.

For Co-funded partnerships in-kind contributions could be for instance personnel that is not paid by the partnership or time of using infrastructure or facilities, etc.

For Institutionalised partnerships in-kind contributions would refer to the so-called IKAA. The other dimension, that of in-kind contribution to HEU projects is not that relevant to report here as this indicator refers to the partnerships as a whole rather than to the individual projects data.

- [#1 Baseline:](#)

If applicable, how much of the commitment in cash for the predecessor partnership under Horizon2020 was turned into actual contributions? [million €]

If applicable, how much of the commitment in-kind for the predecessor partnership under Horizon2020 was turned into actual contributions? [million €]

Do you need data only for the H2020 period? There were also some follow up calls after the Horizon 2020 period.

Yes – the data is collected for the Horizon 2020 period, but if you have had some follow up calls after the Horizon 2020 and before your new partnership, you are very welcome to add this data also. If there are

that kind of exceptions, please add an additional explanation so that it would be also known to the expert group and they could take it into account for their further analysis.

For Co-programmed partnerships, investments in operational activities as described in the MoU are part of indicator #1.

- #1 Progress:

How much have the partners other than the Union committed in cash to this partnership by August 2023 (or latest available data, please indicate in the comments section the date)? [million €]

How much have the partners other than the Union committed in kind to this partnership by August 2023 (or latest available data, please indicate in the comments section the date)? [million €]

Should we state here the number stated in the agreement with EC (this has not changed)? Or the data related to the first calls?

It should be the budget spent (or committed to the first calls) by August 2023.

Indicator #2

Broader investments beyond the contributions from partners and triggered by the partnership that contribute to achieving their objectives.

- It is very difficult to identify almost any type of additional investments, as nobody has the obligation to report them to the partnership?

The European Partnerships have the obligation to report on Common Indicators. The confusion might be caused by the fact that the information needed for the common indicators is asked at partnership level not at the project level.

Is there an option to provide more specific information regarding this indicator?

Yes, the *Other* option is added to the survey. Please feel free to highlight

How it is related to the Partnerships? It should be asked directly to the member states?

Some partnerships reported to the last CI survey some great examples, but if your partnership does not have that kind of data, do not worry – A similar question will be asked also from the countries in the country fiche.

Additional investments may also refer to industries or SMEs or other type of stakeholders (beyond MS) that take own decisions about further investments triggered by their participation in partnerships, e.g. an industry decides to allocate own resources in a particular area of research drawing on the strategic trends and evolutions that emerge due to the involvement in the partnership - this needs to stay though at the partnership level and not consider what the individual beneficiaries may do after their participation in research projects. The latter element may be asked for in future BMRs where some projects may be concluded.

For co-programmed partnerships, in-kind contributions from partners in the projects which are not members nor affiliates of the partnership can be counted in indicator 2

Add total amount of investment referring to the total additional activities triggered by your participation [€]

Your?

It is meant the Partnership.

“Add total amount of investment referring to the total additional activities triggered by the partnership.”

We refer here to any other types of initiatives/investments the MS/ACs or industries decided to do (national programmes to follow-up successful partnership projects, other schemes to scale up results, etc. or decisions to support in-house research in industries, etc.) triggered by the participation of ministries and funding agencies or industries/SMEs in the partnership.

Indicator #3

Share of total Partnership funding Overall (public and private; in-kind and financial) investments mobilised into EU priorities after contract signature with the Commission

- [What are the priorities selected?](#)

The first biennial monitoring report focused on the EU's transitions towards the green and digital objectives, and support to a more resilient society, which constitute the major priorities of both the current Commission and the first Strategic Plan of Horizon Europe (2021-2024). According to the literature analysis done for the first biennial report, a hard target of 35% has been set in the Horizon Europe legal base for funding climate action¹. The same 35% target is expected in support of the digital transition². Resilience is a multidimensional and cross-cutting issue, so setting similar funding targets is not easy.

The second biennial monitoring report will continue to look at these three EU priorities in order to keep track and better understand how the partnerships intend to turn their expected results into useful innovations for European citizens and strengthen the ERA, and thereby contribute to the EU priorities of the green and digital transitions and resilience.

1) Art.7(10) Horizon Europe Regulation.

2) Funding for Digital | Shaping Europe's digital future (europa.eu)

Please read more from the second interim report of 2022: [A framework for the biennial monitoring report on European Partnerships](#)

As an example, the Metrology Partnership took the target they are planning to invest in green deal calls within the Partnership. The Baseline was the Calls related to Energy and Environmental Calls they had in our previous Partnership. And the Progress was what they had funded up to date (Aug 2023) in the Green Deal Calls.

- [How the priorities were selected?](#)

Both, the reports of 2022 and 2024 look at the expected contribution of European Partnerships to the EU priorities of green and digital transitions and resilience. Read more about the green and digital transition and resilience [HERE](#).

The report of 2024 will also focus on the technological sovereignty and internationalisation. The priorities for the biennial monitoring reports are selected by European Commission together with Partnership Knowledge Hub.

Indicator #4

Based on your best guesstimate, how much of your overall budget is planned for connections/collaboration with non-European actors?

This can be calculated in three 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,
- At the programme level, 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 the Associated and Third countries are meant.

Indicator #6

Membership in partnerships, including geographical coverage

- [This indicator was previously not part of the common indicator survey?](#)

Yes, this indicator was merged with the indicator #4.

Please upload the Excel file with the members of your partnerships, included affiliated members, but NOT the beneficiaries

Indicator #9

Visibility of the partnership in European, international policy/industry cycles

- [It could be helpful to see what was answered under this indicator at the previous CI survey. Could that information be provided?](#)

The EC has access to the aggregated excel file with all the previous responses. However, partnerships are responsible for keeping track of their own answers and store them in a safe way for future references.

Which countries are attracted by the Partnership to become members or associate themselves to the partnership in some way?

This indicator is not about the existing members but members **to be, i.e. countries or associations/organisations** that are interested to join your partnership or become associated with it. We are interested to learn both about ministries/funding agencies of countries as well as other actors (e.g. industrial associations or organisations, etc.) and their countries of origin.

We refer either to policy cycles or industry cycles. The former is more relevant to partnerships where Member States or Associated Countries have an official role in jointly designing the partnership's programme and contributing to the budget. The latter is more relevant for partnerships where industry plays an important role. In such cases an industry might be interested in joining the partnership. Such information may also lie with the relevant EC officials.

Indicator #10

Alignment of national / regional / sectorial policies or industrial strategies

This indicator refers to influence or reflection of SRIAs for instance on national policies/priorities and vice versa as well as on industrial and/or sectorial strategies due to participation in partnerships.

- Thematic Focus

Additional question 2: Which of the following additional activities are planned by your Partnership?

This question refers to the partnership as a whole and is totally separate from the first additional question about the technological sovereignty. Here we are interested to learn the type of additional activities your partnership undertakes. The thematic focus of the BMR 2024 is triple, i.e. technological sovereignty, partnerships' activities beyond joint calls and internationalisation.

- Additional data for the mid-term evaluation of Horizon Europe

Cascade funding:

By cascade funding, we mean financial support to third party. It is generally done by co-funded partnerships, but could also be done by co-programmed, would you have co-fund actions in the work programme.

What is an eGrants system?

It is the electronic grant management system and services of the European Commission ([Funding & Tenders Portal](#)).