

Webinar: The new Monitoring and Evaluation (M&E) Framework for Partnerships

18 September 2023

Summary Q&A Session

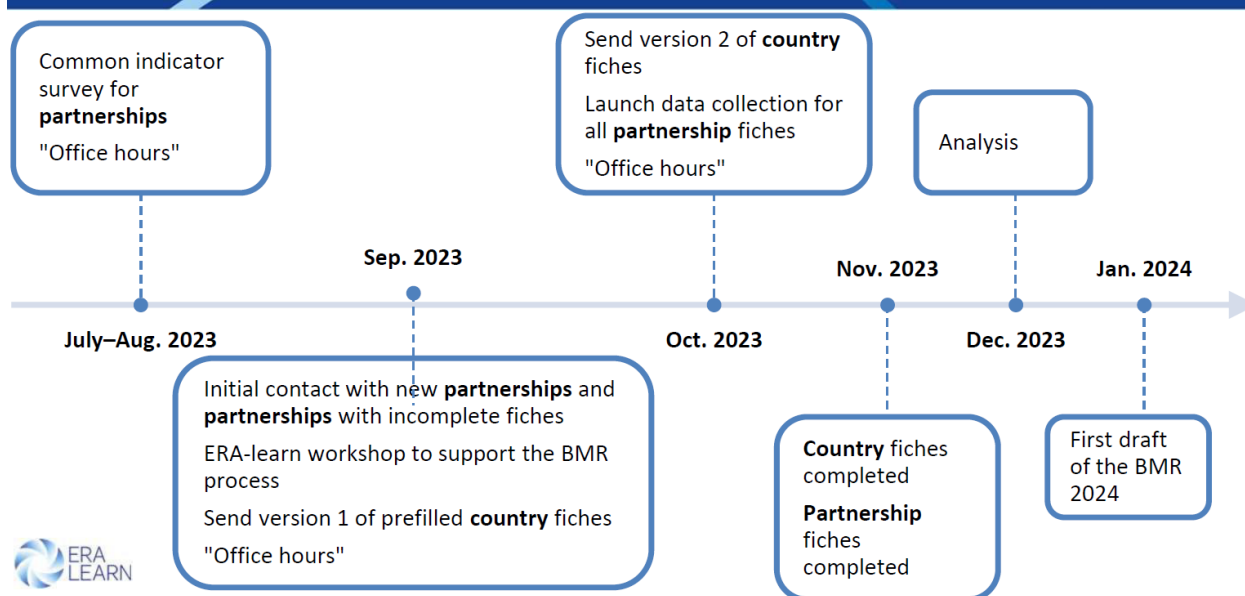
On 18 September 2023, the European Commission and ERA-LEARN organised a webinar to familiarise partnerships and member state officials with the new requirements building on the guidelines (2nd Interim Report) of the Expert Group.

This document is a summary of the Q&A session.

General aspects

Q; what is the timeline for the tasks ahead?

Indicative timeline



Q: What is the timeline and when the fiche templates will be available?

A: In the coming days, before the end of September. As shown in the timeline there will be initial bilateral contacts with the expert group member assigned to your partnership before the end of September to kick-off the start of completing the partnership fiches. Inputs will be requested to be finalised by half November with a review period to finalise by half December.

For the country fiches, these will be pre-filled in (regarding the some quantitative data on the first page and they will be sent to you by end Sept to start filling in the qualitative parts. As more data become available in Oct, a second version will be sent with all quantitative data filled in. the review process will last all Oct and until mid Nov when the country fiches need to be finalised.

Common indicators

Q: For indicator 1: does it consider investment on operational costs, or also on administrative costs of the partnership?

A: Indicator 1 aims to show all types of commitments (in-cash, in-kind) and for any type of activity (operations, administration, programme implementation, etc.) and eventually actual contributions, by any actor other than the Union.

Q: Can you please clarify what is the relevance of the Baseline for Indicator 1, considering that there is a different legal basis from the predecessor? How can one use it to draw coherent conclusions? I also understood from my colleagues that the methodology for the accounting of the contributions has changed.

A: Baselines show that the partnership is not starting from scratch. Its predecessor(s) have already achieved something, e.g., €10 million in actual contributions in the total duration of the predecessor partnership. This is the starting point for the new one, whose performance should be compared against.

Q: For the indirect leverage (indicator 2): Why is a different wording chosen in the survey then what is agreed in the MoU between Eu and Partners other than the union

A: We tried to use language that is free of any specific terminology because there is no terminology that is common to all partnership types

Q: (Indicator 2) - The presentation says “qualitative”. This this means that a quantitative assessment does not need to be given / is optional?

A: Yes

Q: Concerning Indicator 6, it is a problematic indicator for many of the JUs, as was also pointed out to the Commission during the workshops for the drafting of the AARs. We do not have access to the members of our members, it is up to them if they want to share the information and we cannot affect this, therefore we also can't see the applicability of this indicator for our JU. We also made this point in our recently published AAR.

A: For any indicator that seems irrelevant / not applicable to your partnership, please insert your explanation to the respective comment box. Before doing so, however, please join the last office hour to explain and (re)confirm that this is the case.

Q: For co-programmed Partnerships CINEA – or HADEA - is much better placed to assess time to grant. Are they involved?

A; They are not involved in the common indicator survey. The EC is better placed to answer this question.

Q: For Indicator 3, could you please clarify whether we are asked to provide progress for investment into the 3 EU priorities over the commitments so far, or over the whole 7-year budget of the partnership?

A: the progress refers to the total partnership budget, which is reflected in the Target in the same indicator

Q: Indicator 2 requests information from national funds that we do not have. Is this only addressed to co-funded Partnerships?

A: In case the data is now available, you may explain this to the respective comment box.

Q: Indicator 1: in the MoU, the wording of direct and indirect leverage does not exist any more. Clarification on what is meant by each is needed.

A: explanations are included in the survey itself and more clarifications are also provided in the FAQ document also uploaded on the event's webpage.

Q: Direct leverage: do you mean the in-kind contributions from our members and affiliates (as per our MoU)?

A: Yes

Q: Concerning #8, the question refers to the funds "mobilised", can you clarify what it covers? Some partners will beneficiate from such funds in the future, but it only represents in-cash commitment so far, there is no guarantee that it will be fully used.

A: Please insert your estimations/expectations, even preliminary at this stage – if not in the direct answer space, then at the comment boxes at the end.

Q: What you are telling is completely out of our scope. Does indicator 2 then apply only to co-funded partnerships?

A: This indicator may be relevant for any type of partnership – not only Cofunds as explained in its description. If you think it is not relevant for your partnership, please explain, in the comment box.

Q: We find that indicators 2 and 8 overlap, as far as the complementarities with other national or EU funds are concerned. Could you please explain the difference? For example, should the complementary funding from Structural funds (e.g. ERDF) be reported both in 8 and 2? Thanks

A: Yes, there is an overlap with regards to the ESIF. Indicator 2 is more qualitative and if there is a figure it is welcome. Indicator 8 is quantitative and requests shares of partnership total budget rather than absolute amounts.

Q: The operational activities in our SRIA refer to any activity that is beyond the additional activities and addresses our MoU. I see a disconnection here between what we have engaged to and what we are required.

A: if the operational activities are not obligatory to be implemented by the partnership members, then they are eligible to be reported under indicator 2.

Q: We can only provide information about issues which are under our engagement in the MoU and under our scope. Could you please confirm that there are some indicators we should not provide input to because they do not apply to our Partnership?

A: We would greatly appreciate if you could use the comment boxes to explain if/why you think an indicator is not relevant to you. Please join the last office hours to exchange. We will certainly benefit from your clarifications, and you may find that the indicators may be more relevant than you think...just that we haven't thought to give you the right example!

Requirements by Partnerships

Q: An institutionalized partnership, should prepare both, partnership fiche and country fiche? Or should we only provide you with the first one?

A: The partnerships should only prepare the partnership fiches. The country fiches are to be prepared by representatives of Member States and Associated Countries.

Q: We at BE READY (partnership pandemic preparedness in development) are looking for examples of M&E systems. We already have KPIs and PSIPS, but look for example description of who collects these and when and who is responsible for what. How much of that do we need to describe in the partnership proposal and how much in an annex or separate M&E plan? Please send to verver@zonmw.nl.

A: In general, we propose to get in touch with partnerships within your cluster, and their M&E experts, to get inspired. Some clusters have set-up learning networks between them to discuss the these particular challenges. The Expert team can help at the level of defining PSIPS and KPIs, but the operational base of M&E systems in terms of who collects what and how, is very

proprietary for each partnership is our experience. The pilot partnerships from the first BMR exercise, DUT, Water4all, Photonics and IHI are potentially to be approached as they were willing to share their experience at different levels.

Q: Is this introductory meeting for new partnerships that have been approved/established, or also for those in development?

A: In general, we would like to focus our effort towards partnerships delivering a partnership fiche for this BMR; but we are willing to assist to the extent of our possibilities to prepare the next BMR and the introduction of potential fiches for partnerships in development.

Q: How do we know in which cluster we are?

A: You may check the EC page about the partnerships:

https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/european-partnerships-horizon-europe_en

Requirements by Member States / Associated Countries

Further information

The guidelines of the Expert Group on support to the Strategic Coordination Process that prepared the BMR 2022 (2nd Interim Report): <https://op.europa.eu/en/publication-detail/-/publication/8c558fae-ec57-11ec-a534-01aa75ed71a1/language-en>

Recommendations on the future support of the strategic coordinating process - Final report of the Commission expert group on support for the strategic coordinating process for partnerships: <https://op.europa.eu/en/publication-detail/-/publication/1b8980fc-ede6-11ec-a534-01aa75ed71a1/language-en/format-PDF/source-259619094>

European Partnerships website: https://ec.europa.eu/info/research-and-innovation/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe/european-partnerships-horizon-europe_en

ERA-LEARN Database on Partnerships: <https://www.era-learn.eu/network-information>

EC Horizon dashboard: <https://webgate.ec.europa.eu/dashboard/sense/app/93297a69-09fd-4ef5-889f-b83c4e21d33e/sheet/PbZJnb/state/analysis>

**Please send your questions to the functional mail box:
RTD-EUROPEAN-PARTNERSHIPS@ec.europa.eu**