



# Lump Sum Funding in European Collaborative Research Projects

*Practitioner Experiences from Horizon Europe and Horizon 2020*

Summary Report of the 3<sup>rd</sup> IGLO in Action on Lump Sum Funding

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## **Organised by**



on behalf of the IGLO Implementation Working Group

## About IGLO

[IGLO](#) is an informal association of Brussels-based non-profit R&D liaison offices. Its aim is to facilitate and enhance interaction, information exchange and cooperation between IGLO members, their national research systems and the European institutions on issues related to EU research and innovation policy, in particular the Framework Programme. The workshop was organised under the co-chairmanship of representatives from [KoWi](#) and [NORCORE](#) within the IGLO Implementation Working Group.

## Acknowledgements and Participants' Organisations

The authors would like to thank all participants for sharing their experiences and insights on the implementation of lump sum funding in collaborative Horizon 2020 and Horizon Europe projects. We also thank the observers from the European Commission and the European Research Executive Agency (REA) for attending the workshop and following the discussions.

Special thanks go to the IGLO network, and in particular the IGLO Implementation Working Group, for their support in recruiting participants and contributing to the workshop as moderators and note-takers. We also acknowledge the valuable support of the EARMA-BESTPRAC network, through which information about the workshop was shared with the wider European research management community.

Workshop participants came from the following organisations:

Aalborg University • Ca' Foscari University of Venice • CERN • Chemnitz University of Technology • CNRS National Centre for Scientific Research • Comenius University Bratislava • Coventry University • Czech University of Life Sciences Prague • Dresden University of Technology • Dublin City University • Erasmus University Rotterdam • European University Viadrina Frankfurt (Oder) • FCIências.ID - Associação para a Investigação e Desenvolvimento de Ciências • Flanders Research Institute for Agriculture, Fisheries and Food • Fundacion Tecnalia Research & Innovation • Geological survey of Slovenia • Ghent University • Hasselt University • Humboldt University Berlin • NOVA University Lisbon • IZOR Institute of Oceanography and Fisheries • Kaunas University of Technology • Koç University • KTH Royal Institute of Technology • KU Leuven • Linnaeus University • Ludwig Boltzmann Society • Masaryk University • Max Delbrück Center • Medical University of Lodz • Miguel Hernández University of Elche • CNR National Research Council • Nicolaus Copernicus University • NTNU - Norwegian University of Science and Technology • Open University of Catalonia • Oslo Metropolitan University • Poznan University of Technology • Katarzyna Końska • SINTEF Foundation for Scientific and Industrial Research • Technical University of Civil Engineering Bucharest • Technical University of Denmark • Technische Universität Braunschweig • TU Wien • UK Centre for Ecology & Hydrology • Universidad Carlos III de Madrid • University of Alcalá • University of Algarve • University of Amsterdam • University of Belgrade - Faculty of Chemistry • University of Bergen • University of Bern • University of Bordeaux • University of Edinburgh • University of Granada • University of Ljubljana • University of Manchester • University of Oslo • University of Rijeka • University of Twente • University of Warsaw • Utrecht University • Vilnius University • VITO Flemish institute for technological research • VLIZ Flanders Marine Institute

## Disclaimer

This report reflects experiences, observations and discussion points shared by practitioners involved in Horizon 2020 and Horizon Europe lump sum projects. It does not represent a common position of the IGLO network, nor should it be interpreted as the position of the organisations with which the participants are affiliated. The report is intended as a summary of workshop discussions and practical experiences.

## Executive Summary

Lump sum funding is playing an increasingly important role in Horizon Europe and is expected to remain a central topic in discussions on the future design of European research funding. To contribute practical implementation experiences to this debate, the third *IGLO in Action on Lump Sum Funding* workshop brought together research management and administration professionals from across Europe to exchange experiences from collaborative Horizon 2020 and Horizon Europe projects.

Participants reported a range of **positive experiences** with the funding model. Reduced financial reporting requirements were widely regarded as a significant advantage, allowing **greater focus on project implementation** and scientific progress rather than financial compliance. Several participants also shared positive experiences regarding project reviews and project completion under the lump sum model. The discussions further suggested that the funding model can help shift attention towards the achievement of project objectives, milestones and deliverables, fostering a stronger focus on implementation and results.

At the same time, discussions highlighted a number of **operational challenges**. Participants described ongoing uncertainties regarding work package completion, evidence and documentation requirements to prove implementation, budget flexibility, consortium management and the practical handling of project changes. Experiences also suggested that the effects of lump sum funding can differ considerably depending on organisational role, institutional context and responsibilities within the consortium. In particular, coordinators were often perceived as facing increased responsibilities in monitoring implementation progress, managing risks and ensuring a common understanding of expectations across the consortium.

A recurring theme throughout the workshop was that simplification cannot be assessed solely by examining financial reporting requirements. While many participants acknowledged important simplification effects, discussions indicated that **administrative effort may in some cases be shifted rather than eliminated**. New demands arise in relation to implementation monitoring, project oversight, documentation practices and internal coordination. Whether lump sum funding represents a simplification in practice, and for whom, therefore depends on a variety of factors, including organisational structures, project characteristics and the perspective of the actor concerned.

Participants also described a range of **organisational adaptations and emerging practices** developed in response to the funding model. These included increased attention to the design of work packages during proposal preparation, closer cooperation between scientific and administrative staff, the development of internal monitoring approaches and the growing importance of clear consortium arrangements. Workshop discussions suggested that many organisations are gradually adapting their processes and support structures to the specific requirements and opportunities associated with lump sum projects.

The workshop further highlighted a number of **open questions that continue to shape implementation experiences**. Participants discussed uncertainties relating to the assessment of work package completion, the level and type of evidence required during project implementation, the handling of partially completed work packages, and the practical implications of budget and implementation flexibility. While experiences to date have helped clarify certain aspects of the model, participants noted that a number of important questions remain unresolved. Further practical experience, combined with additional guidance in key areas, could help reduce uncertainty and support more consistent implementation practices.

Looking beyond individual implementation challenges, participants also reflected on the broader implications of lump sum funding for research management and project governance. Discussions indicated that the **practical impact of the funding model is influenced not only by the funding rules themselves**, but also by organisational procedures, institutional accountability requirements and consortium dynamics. As a result, experiences with simplification may vary considerably across organisations, functions and project roles.

Participants further emphasised that many important questions remain open. As relatively few projects have reached completion, practical experience with project closure, incomplete work packages and the longer-term implications of the funding model remains limited. The workshop discussions therefore suggested that it is **still too early to draw definitive conclusions** regarding the overall impact of lump sum funding, its simplification potential across different contexts, or its appropriate role relative to actual cost funding.

The workshop also demonstrated the **continued value of practitioner exchanges on evolving funding instruments**. By bringing together participants from a wide range of organisations and countries, this *IGLO in Action* workshop provided an opportunity to share experiences, identify common challenges and contribute practical perspectives to ongoing discussions on the future development of European research funding.

# Table of Contents

|                                                                                       |     |
|---------------------------------------------------------------------------------------|-----|
| Executive Summary.....                                                                | i   |
| Table of Contents .....                                                               | iii |
| 1. Introduction .....                                                                 | 1   |
| 1.1 Background .....                                                                  | 1   |
| 1.2 Participants .....                                                                | 1   |
| 1.3 Methodology.....                                                                  | 2   |
| 2. Areas Where Participants Reported Benefits.....                                    | 3   |
| 2.1 Reduced Financial Reporting Requirements .....                                    | 3   |
| 2.2 A Shift Towards Implementation and Results .....                                  | 3   |
| 2.3 Positive Early Experiences with Project Completion and Reviews .....              | 4   |
| 3. Implementation Challenges, Shifting Responsibilities and Consortium Dynamics ..... | 4   |
| 3.1 Uncertainty in Demonstrating Progress and Work Package Completion .....           | 5   |
| 3.2 Limited Reduction in Documentation and Record Keeping Requirements .....          | 6   |
| 3.3 Shifting Responsibilities Between Administrative and Scientific Functions .....   | 7   |
| 3.4 Diverging Monitoring Needs and Perspectives Within Consortia .....                | 8   |
| 3.5 Increased Responsibilities and Management Demands for Coordinators .....          | 8   |
| 3.6 Challenges in Managing Budget Reallocations and Project Changes .....             | 9   |
| 4. Organisational Adaptation and Emerging Practices .....                             | 11  |
| 4.1 Designing Projects for Lump Sum Implementation .....                              | 11  |
| 4.2 Strengthening Project Monitoring while Keeping it Proportionate .....             | 11  |
| 4.3 Maintaining Evidence of Project Implementation .....                              | 12  |
| 4.4 Closer Cooperation Between Administrative and Scientific Functions .....          | 13  |
| 4.5 Consortium Agreements as a Governance Tool.....                                   | 13  |
| 4.6 Connecting Pre-Award and Post-Award Experience.....                               | 14  |
| 5. Areas Where Practitioners Sought Further Clarification .....                       | 15  |
| 5.1 Work Package Completion and Payments .....                                        | 15  |
| 5.2 Reviews and Supporting Evidence .....                                             | 15  |
| 5.3 Roles and Responsibilities Within Beneficiary Institutions .....                  | 16  |
| 5.4 Consortium Governance and Coordinator Responsibilities .....                      | 16  |
| 5.5 Budget Reallocation, Underspensing and Project Changes .....                      | 17  |
| 6. Reflections on the Further Use of Lump Sum Funding .....                           | 18  |
| 6.1 Simplification Is Not Experienced Equally Across Organisational Roles .....       | 18  |
| 6.2 Experience Depends on the Role Within the Consortium .....                        | 18  |
| 6.3 Budget Flexibility May Be More Limited Than Expected .....                        | 19  |
| 6.4 Funding Rules Alone Do Not Determine Simplification .....                         | 19  |
| 6.5 More Experience Is Needed Before Drawing Firm Conclusions.....                    | 20  |
| 7. Concluding Remarks .....                                                           | 21  |

# 1. Introduction

## 1.1 Background

Lump sum funding is playing an increasingly important role in Horizon Europe and is expected to remain a prominent funding model in the next EU Framework Programme. As the number of lump sum calls and funded projects continues to grow, more organisations are gaining practical experience with preparing proposals and managing projects under this funding scheme.

While experience with lump sum proposal preparation has become more widespread, organisations having experience with ongoing or completed lump sum collaborative projects still represent a relatively small group within the broader research management community. At the same time, there is strong interest among practitioners in understanding how the lump sum model affects project implementation in practice and how it compares to traditional actual cost funding. Beyond the research management community, there is also considerable interest at the policy level in understanding how lump sum funding performs in practice, whether it achieves its intended objective of simplification, and to what extent it may complement existing funding approaches such as the actual cost model.

To contribute to this discussion, the Informal Group of R&D Liaison Offices (IGLO), represented by its members KoWi and NORCORE and supported by the IGLO Implementation Working Group, organised on 21 May 2026 the third edition of its *IGLO in Action* online workshop series on lump sum funding. Building on earlier editions, this workshop focused specifically on implementation experiences rather than proposal preparation. The workshop focused exclusively on collaborative projects funded under Horizon 2020 and Horizon Europe, where the interaction between consortium partners requires additional organisational, managerial, and financial considerations. It aimed to facilitate an exchange of experiences among practitioners with direct hands-on experience and to make these insights accessible to a wider audience through the present report.

## 1.2 Participants

The workshop brought together **67 research management and administration practitioners** from universities, research institutes, research and technology organisations, and international organisations across Europe. Participants represented a diverse range of institutional profiles and brought direct experience with the implementation of Horizon 2020 and Horizon Europe lump sum projects.

All participants were active in post-award research management, while many also had experience in proposal preparation and project acquisition. Both project coordinators and project partners were represented, with around one third of participants having coordinated projects themselves.

Participants were recruited primarily through the IGLO network, complemented by outreach through the EARMA-BESTPRAC community. Overall, the workshop attracted participants from **23**

**European countries**<sup>1</sup>, providing a broad basis for the exchange of practical experiences and perspectives on lump sum funding. This diversity of institutional and national backgrounds contributed significantly to the richness of the discussions and the exchange of implementation experiences.

### 1.3 Methodology

The workshop was organised as an online event and followed the established *IGLO in Action* format, which is designed not only to facilitate a structured exchange of practical experiences among research management professionals, but also to provide feedback from the research community to European stakeholders involved in the design and implementation of research funding programmes. Participants engaged in **moderated breakout group discussions** based on a common set of guiding questions covering key aspects of lump sum project implementation.

Following the group discussions, observations were consolidated and analysed to identify **recurring themes, common challenges, and perceived differences between lump sum and actual cost projects**. Selected live polls were also conducted during the workshop to complement the discussions and provide further perspectives on participants' experiences and perceptions. The resulting findings were subsequently synthesised and documented in this report.

In addition, representatives of the **European Commission** and the **European Research Executive Agency** participated in the workshop **as observers**. This allowed them to directly hear practitioners' experiences, challenges, and reflections on the implementation of lump sum funding and to engage with the perspectives emerging from the discussions.

The findings presented in this report should be understood as **practitioner perspectives rather than statistically representative evidence**. The workshop was not designed as a quantitative survey, and the experiences and observations shared by participants have not been independently verified. Similarly, the live polls conducted during the workshop provide only indicative evidence of the views of those participating and should not be interpreted as representative of the wider community. Nevertheless, the discussions and poll results offer valuable insights into how academic and research-performing organisations are experiencing the implementation of Horizon 2020 and Horizon Europe lump sum collaborative projects in practice.

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<sup>1</sup> Austria, Belgium, Croatia, Czechia, Denmark, France, Germany, Ireland, Italy, Lithuania, Netherlands, Norway, Poland, Portugal, Romania, Serbia, Slovakia, Slovenia, Spain, Sweden, Switzerland, Türkiye, United Kingdom

## 2. Areas Where Participants Reported Benefits

Participants reported a range of positive experiences with lump sum funding, particularly in relation to reporting practices, project management and the overall focus of project implementation. The following sections summarise the benefits and simplification effects most frequently highlighted during the workshop.

### 2.1 Reduced Financial Reporting Requirements

Across all discussion groups, participants identified reduced financial reporting requirements as one of the most visible simplifications introduced by lump sum funding. This perception was also reflected in a live poll conducted during the workshop, where over four fifths of the respondents indicated that they considered the reporting process to be either much simpler or somewhat simpler.

Compared to actual cost projects, beneficiaries **no longer need to report individual cost items** to the European Commission, provide detailed financial breakdowns, or verify the eligibility of specific expenditures. As a result, financial reporting towards the Commission was widely perceived as significantly less burdensome.

A frequently highlighted aspect was the **elimination of personnel cost calculations** for reporting purposes. Participants appreciated that personnel costs no longer need to be calculated according to complex eligibility rules and that timesheets are generally not required for reporting to the Commission. This was seen as reducing both administrative effort and the risk of reporting errors.

Furthermore, participants observed that fewer discussions between administrative and scientific staff are required regarding cost categories, cost allocation, and financial calculation methods.

Participants also highlighted that the **technical side of reporting** in the EU Funding & Tenders Portal has become **considerably simpler**. Instead of entering detailed financial data, coordinators confirm the completion of work packages, and a financial statement is created automatically.

Overall, reduced financial reporting requirements were consistently perceived as a major benefit of lump sum funding and one of its most visible simplification measures. However, participants also emphasised that the reduction of financial reporting obligations is accompanied by new demands related to project implementation, monitoring, and the demonstration of progress. These aspects, and the challenges they may create in practice, are discussed in chapter 3.

### 2.2 A Shift Towards Implementation and Results

Many participants reported that the emphasis of project management and reporting has shifted from financial administration towards project implementation and the delivery of results. Rather than focusing on expenditure and budget categories, reporting discussions were described as concentrating on whether planned work had been completed and expected outputs had been achieved.

This shift was reflected both in reporting practices and in day-to-day project management. Participants observed that monitoring activities increasingly **focus on technical progress**,

deliverables, milestones and work package implementation. Internal exchanges within consortia were often described to rely more heavily on scientific reports, presentations and other forms of implementation evidence than on detailed financial information. Several contributors noted that discussions with researchers are now more closely linked to project progress and achievement of objectives than to questions of financial compliance.

Many considered this development beneficial because it **increases the visibility of scientific and technical progress** and encourages a stronger focus on the delivery of planned activities and outputs. Internal project management was described as becoming more implementation-oriented, with greater emphasis on monitoring progress, coordinating deliverables and ensuring the timely completion of project work.

Overall, participants viewed this shift as a defining feature of lump sum funding. Rather than reducing management effort altogether, lump sums were often described as redirecting attention from financial compliance towards project implementation and results. While this was widely regarded as a positive development, workshop discussions also revealed a range of practical challenges and new management requirements arising from this shift. As discussed in chapter 3, these challenges were in some cases perceived as offsetting part of the simplification gains associated with the lump sum approach.

## 2.3 Positive Early Experiences with Project Completion and Reviews

Participants generally reported positive experiences with project completion under lump sum funding. While many contributions referred to ongoing projects, more than one third of participants reported having experience with the completion of at least one lump sum collaborative project, providing a valuable basis for discussing project closure and final reporting. Those who shared experiences from completed projects described project closure and final reporting as largely straightforward. Final reporting was often perceived as comparable to established practice, with the main difference being the reduced role of financial reporting requirements. No concrete examples were discussed of projects reaching the end of their duration with unfinished work packages. Consequently, the workshop discussions did not provide practical insights into how such situations might affect funding at project closure.

A limited number of participants also reported experiences with project reviews. These were generally described as smooth and manageable, with **discussions focusing primarily on project progress, deliverables and milestones**. Several contributors noted that review processes in lump sum projects appeared broadly comparable to those familiar from other collaborative EU projects, with particular attention to whether planned activities had been carried out and expected outputs delivered.

Participants who had undergone such reviews indicated that standard project documentation, deliverables and other evidence of implementation were generally sufficient to support the assessment process. Feedback from reviewers and Project Officers was described as constructive and implementation-oriented, with **no additional financial information being requested**. In some cases, review discussions focused on explaining delays or deviations from the original work plan and demonstrating progress towards project objectives.

Overall, the experiences shared during the workshop suggest that project implementation, review processes and project closure can be managed successfully under lump sum funding. However, as only a limited number of participants reported direct experience with completed projects and reviews, these observations should be regarded as early indications rather than definitive conclusions.

### 3. Implementation Challenges, Shifting Responsibilities and Consortium Dynamics

While participants highlighted several benefits of lump sum funding, they also reported a range of challenges arising from its practical implementation. Many of these experiences were linked to questions of monitoring, documentation, risk management and consortium coordination. The following sections provide an overview of these concerns.

#### 3.1 Uncertainty in Demonstrating Progress and Work Package Completion

While participants generally welcomed the stronger focus on implementation and results under lump sum funding, many also reported practical challenges related to demonstrating project progress and work package completion. Participants were particularly unsure about the definition of a “completed work package”, the extent to which partially completed work can be recognised, and the evidence required to demonstrate that planned activities have been successfully implemented.

A recurring observation was that research and innovation projects often progress incrementally and do not always fit neatly into categories such as “completed” or “not completed”. Consequently, beneficiaries may face difficulties in documenting situations where substantial work has been carried out but certain activities, milestones, or deliverables remain outstanding. Participants expressed concern that significant progress may have been achieved, while at the same time little or no progress can formally be reported if a work package is not considered complete.

Participants further highlighted **uncertainties regarding the assessment of partially completed work packages** and the determination of their degree of completion. This issue becomes particularly relevant at the end of a project, when incomplete work packages may need to be reported in order to determine the corresponding partial payment. However, participants noted that such assessments can also become important during project implementation, for example when consortium partners leave a project and tasks need to be redistributed, or when work packages have to be adapted in response to changing circumstances. In this context, participants questioned how a percentage of completion should be defined and justified, given that actual costs are no longer intended to play a role under the lump sum model.

Particular challenges were reported where the contributions of different beneficiaries are closely interconnected within a work package. In such cases, delays or incomplete contributions by one partner may affect the completion status of activities carried out by others and complicate the assessment of overall progress and, as a consequence, the distribution of the EU-contribution among the parties concerned.

Workshop discussions also suggested that practical experience with project reviews and project closure under lump sum funding remains limited. Participants therefore reported **differing expectations regarding the type and level of evidence** that may be required to demonstrate implementation and work package completion. As a result, some organisations have responded by placing greater emphasis on documenting technical progress and retaining supporting evidence throughout the project lifecycle.

Overall, participants identified the demonstration of progress and quantification of work package completion as one of the most significant practical challenges associated with the implementation of lump sum funding.

### 3.2 Limited Reduction in Documentation and Record Keeping Requirements

As discussed in the previous chapter, participants frequently reported uncertainty regarding the type and level of evidence required to demonstrate progress and successful work package completion under lump sum funding. To mitigate this uncertainty, many organisations continue to maintain extensive documentation practices, including the collection and retention of financial records that are no longer required for reporting to the European Commission. Consequently, some participants felt that the reduction in formal financial reporting requirements has not always translated into a proportional reduction in internal documentation efforts.

The live poll conducted during the workshop supports this observation. Nearly half of participants reported no noticeable change in record-keeping requirements compared to actual cost funding. While fewer than one in ten participants perceived a significant reduction in documentation efforts, an equal share reported a significant increase.

Participants identified two main reasons why documentation requirements frequently remain substantial under the lump sum model.

First, many organisations continue to be subject to **institutional, national or other external accountability requirements that exist independently of Horizon Europe** rules. Participants referred, for example, to national audit requirements, internal control systems, obligations to demonstrate the absence of double funding, and the practical challenge of managing lump sum and actual cost projects in parallel. In many cases, organisations also considered it easier and less risky to maintain established procedures across different funding schemes than to introduce separate processes for lump sum projects.

Second, workshop discussions highlighted that documentation is often maintained because of **uncertainty regarding which evidence** may ultimately be needed **to demonstrate proper project implementation**. While lump sum funding removes the need to justify actual costs, participants noted that expectations regarding evidence of completed activities and achieved results are often perceived as less clearly defined. In this context, some organisations continue to collect a broad range of supporting documentation as a precautionary measure, seeking to ensure that sufficient evidence is available should questions arise during project reviews or audits.

This was particularly evident with regard to time recording. Most participating organisations reported **retaining some form of working-time documentation**, although approaches varied considerably. While a few institutions had even abandoned timesheets altogether, others had simplified existing procedures, whereas some continued to apply requirements largely unchanged from actual cost projects. Participants emphasised that these decisions are often driven by internal compliance and risk-management considerations rather than by formal requirements of the lump sum model itself.

At the same time, documentation was not viewed solely as a compliance tool. Several participants highlighted its **value for monitoring project implementation**, supporting resource planning, tracking effort across work packages and maintaining an internal record of project

activities over time. Some organisations also considered cost-related information to be a useful proxy for project progress, particularly in situations where evidence requirements for demonstrating implementation remain uncertain. In addition, concerns about potential disputes within consortia, for example regarding task reallocations and corresponding budget adjustments, were mentioned as a reason for maintaining more detailed records than formally required. Being able to demonstrate the resources already committed to project tasks was perceived as strengthening a partner's position in such discussions (see chapter 3.6).

Overall, participants reported that reduced financial reporting obligations towards the European Commission do not automatically translate into a comparable reduction of internal administrative effort. Instead, documentation practices continue to be shaped both by existing institutional accountability requirements and by uncertainty regarding the evidence needed to demonstrate successful project implementation under the lump sum model.

### 3.3 Shifting Responsibilities Between Administrative and Scientific Functions

Participants perceived a practical shift in responsibilities for demonstrating and confirming implementation **from administrative towards scientific and technical staff**. While administrative personnel are generally less involved in financial reporting towards the Commission than under actual-cost projects, greater importance is attached to evidence demonstrating project implementation and progress.

Several participants observed that responsibility for explaining project achievements, deliverables and work package completion is increasingly linked to those directly involved in project implementation. Researchers, especially principal investigators and work package leaders therefore often play a more prominent role in providing the information on which reporting, reviews and implementation assessments are based.

At the same time, discussions suggested that **scientific and administrative functions may not always view these responsibilities in the same way**. Administrative staff frequently consider project documentation within a broader context of institutional accountability and risk management, whereas researchers may focus primarily on scientific progress and project outcomes. Participants reported that these differing perspectives can require closer coordination and communication between project teams and support services. This is even more relevant as administrative and financial personnel may be held responsible for signing financial reports, but at the same time, are not always equipped to verify if the information they receive from the researchers is conform with reporting requirements.

The **issue of institutional continuity** was also raised repeatedly. Because implementation evidence may become increasingly important throughout the project lifecycle and after project closure, organisations must ensure that relevant information remains accessible and understandable over time. This task is typically ensured by administrative units rather than by scientific teams. Participants considered this particularly challenging in cases of changes in project leadership or the departure of key researchers.

Overall, participants emphasised the importance of developing a shared understanding of roles, responsibilities and documentation requirements across different organisational functions which may in some cases lead to structural changes in the future.

### 3.4 Diverging Monitoring Needs and Perspectives Within Consortia

Workshop discussions revealed that experiences with lump sum funding often depend on an organisation's role within the consortium. Coordinators, work package leaders and project partners may face **different responsibilities, risks and information needs**, which in turn can shape their perspectives on project management and monitoring requirements.

Participants acting as coordinators frequently emphasised the importance of obtaining early visibility of project progress, potential delays and implementation risks. Because **coordinators** are responsible for overseeing overall project performance and communicating with the granting authority, many considered timely information from partners essential for effective project management. Participants also noted that **work package leaders** often assume a **stronger monitoring role** under lump sum funding, as they are expected to track progress, collect evidence of completed activities and identify implementation risks within their respective work packages at an early stage.

By contrast, some participants speaking from the perspective of consortium partners questioned whether certain additional reporting and monitoring requirements introduced by coordinators were always necessary. From their perspective, requests for supplementary evidence or internal reporting could sometimes appear **inconsistent with the broader simplification objectives** associated with lump sum funding.

Importantly, participants noted that these positions should not necessarily be interpreted as contradictory. Several contributors observed that the same organisation may favour extensive monitoring when acting as coordinator while taking a more cautious view of additional reporting requirements when participating as a consortium partner.

The discussions therefore suggest that differences in perception are often linked to differences in responsibility and exposure to project risk rather than fundamentally different views on lump sum funding itself.

### 3.5 Increased Responsibilities and Management Demands for Coordinators

As discussed in the previous section, perceptions of monitoring and reporting requirements often differed depending on an organisation's role within the consortium. Participants frequently linked these differences to varying levels of responsibility and exposure to project risk. Against this background, particular attention was given to the role of the coordinator.

Many participants reported that lump sum funding has **increased** both the **strategic importance of the coordinator role and the workload** associated with project and consortium management. While financial reporting obligations towards the European Commission may be reduced, coordinators were widely perceived as taking on additional responsibilities related to monitoring implementation, identifying risks at an early stage, and safeguarding the successful delivery of the project. Several participants therefore suggested that coordinating a lump sum project may require greater management effort and resources than coordinating a comparable project under the actual cost model.

Participants described coordinators as playing a **central role in tracking work package progress**, monitoring deliverables, facilitating communication between partners, and supporting the resolution of implementation challenges. Several participants noted that the coordinator role has become more important under lump sum funding because the release of funding depends on

the successful completion of work packages rather than the declaration of eligible costs. Coordinators were therefore often expected to identify risks to work package completion at an early stage and maintain an overview of progress across the consortium. This was considered particularly important where activities of different beneficiaries were closely interlinked, making delays or underperformance by individual partners potentially consequential for the consortium as a whole.

To manage these risks, several participants reported that coordinators have introduced **additional monitoring mechanisms** to obtain assurance that project objectives remain achievable and that work packages are progressing as planned. While these measures primarily focused on implementation progress, some participants also observed that coordinators request financial information from beneficiaries, which goes beyond the formal requirements of lump sum funding. In some cases, partners were asked to maintain records of actual costs or provide internal financial updates resembling practices commonly used in actual cost projects. Some participants considered such approaches useful for consortium-level oversight and risk management, while others regarded them as running counter to the simplification objectives of the lump sum model.

While discussions primarily focused on the role of the coordinator, participants also noted that **work package leaders** may face **additional management and coordination responsibilities** under lump sum funding, for example when assessing the level of completion of a work package. These additional demands were generally perceived as more limited in scope and focused on individual work packages rather than the project as a whole.

Participants further noted that uncertainties regarding the assessment and documentation of implementation progress and work package completion may further strengthen the coordinator's oversight role. Some felt that implementation problems may become visible later, or be more difficult to assess, in the absence of the regular financial reporting mechanisms familiar from actual cost projects. Reflecting these concerns, some experienced organisations reported feeling more comfortable participating in lump sum projects when acting as coordinator themselves or when coordinators were perceived as exercising strong project oversight.

At the same time, participants stressed that monitoring requirements should remain proportionate and transparent in order to maintain trust, cooperation, and a collaborative spirit within the consortium.

### 3.6 Challenges in Managing Budget Reallocations and Project Changes

Participants identified budget management and project changes as another area where practical challenges continue to arise under lump sum funding. Discussions focused less on financial reporting itself and more on how budget allocations, responsibilities and implementation decisions interact during project execution.

A recurring topic concerned budget reallocations and grant amendments. Participants reported **differing experiences regarding when formal amendments are considered necessary** and when internal consortium arrangements are regarded as sufficient. While some favoured pragmatic solutions and handled budget shifts internally unless project tasks or responsibilities changed, others preferred formal amendments whenever significant changes occurred in order to reduce uncertainty and future risks. Several participants also reported bundling multiple smaller changes into a single amendment when one became necessary. While this practice is

also common in actual cost projects, discussions illustrated that amendments continue to play an important role under lump sum funding whenever substantial changes to project implementation occur.

Amendments were considered particularly relevant when project implementation deviated from the original plan. Examples discussed during the workshop included delays requiring work packages to be reorganised, situations where activities needed to be redistributed among beneficiaries, and cases in which amendments were used to provide greater certainty regarding revised project arrangements. Some participants also referred to situations in which work packages were split into smaller work packages in order to support cash-flow management, particularly for SME partners.

Workshop discussions further highlighted **challenges related to budget reallocations within consortia**. Several participants discussed situations involving underspending by individual beneficiaries and additional resource needs elsewhere in the consortium. Some observed that agreed lump sum shares may increasingly be perceived as belonging to individual beneficiaries, which can make negotiations on redistribution more difficult where one partner expects underspending while another faces additional resource needs. Participants nevertheless emphasised that experiences varied considerably between consortia and appeared to depend strongly on established levels of trust and cooperation.

**Partner withdrawal and non-performance** were described as **particularly challenging** situations. Participants highlighted cases in which a beneficiary left the consortium after receiving pre-financing but before completing its assigned tasks. In such situations, unfinished work must be transferred to other partners while ensuring that project objectives remain achievable. Participants noted that determining whether, and to what extent, a withdrawing partner may retain part of the pre-financing can be particularly difficult, especially in the absence of clear guidance on how such cases should be handled. In this context, the challenges discussed in chapter 3.2 regarding the assessment and documentation of work package completion become particularly relevant, as determining the extent to which a work package has been completed may directly influence decisions on the redistribution of responsibilities and funding. Some organisations reported relying on internal documentation, including time records or similar evidence of effort, to support such discussions.

Overall, workshop discussions highlighted that **project and budget adjustments remain** at least as **important** under lump sum funding as they are in actual cost projects. Participants frequently referred to situations involving amendments, budget reallocations, changes in responsibilities or partner-related issues, indicating that the need to adapt project implementation during the lifetime of a project has not disappeared under the lump sum model. At the same time, the discussions did not allow firm conclusions as to whether such adjustments, and in particular grant amendments, occur more or less frequently under lump sum funding than under actual cost funding.

## **4. Organisational Adaptation and Emerging Practices**

The discussions showed that organisations and consortia are adapting their management approaches in response to the practical challenges associated with lump sum funding. While no single approach emerged as a universal solution, participants described a range of practices intended to improve predictability, strengthen coordination and support implementation throughout the project lifecycle. These practices should not be understood as formal recommendations, but rather as examples of how practitioners are responding to evolving requirements and accumulated experience.

### **4.1 Designing Projects for Lump Sum Implementation**

Participants emphasised that effective management under lump sum funding begins during proposal preparation. Particular importance was attached to the design of work packages that are realistic, achievable and sufficiently clearly defined to facilitate implementation and monitoring throughout the project.

Several contributors highlighted the need for clear links between planned activities, deliverables, milestones and expected results, together with a clear allocation of responsibilities among partners. Dependencies between partners and work packages were also considered an important design consideration, as delays or implementation problems in one area of the project may affect the completion of activities elsewhere. Participants therefore stressed the importance of identifying critical dependencies, defining responsibilities clearly and addressing implementation risks already during proposal preparation.

The design of work packages was also regarded as relevant to situations in which activities are only partially completed. As discussed in chapter 3.1, assessing the percentage of completion of a work package can be challenging where activities and expected results have not been defined with sufficient precision. Participants therefore highlighted the value of structuring work packages in a way that allows progress, completed activities and intermediate results to be assessed more transparently should questions arise during project implementation.

### **4.2 Strengthening Project Monitoring while Keeping it Proportionate**

Several organisations and consortia reported placing greater emphasis on the systematic monitoring of project implementation under lump sum funding. Rather than focusing primarily on financial expenditure, monitoring increasingly concentrates on technical progress, activities, deliverables, milestones, dependencies between partners and the status of individual work packages. Participants noted that early identification of implementation risks is particularly important in a funding model where successful project implementation determines payment.

Frequently mentioned practices included regular implementation meetings, interim progress updates, work package tracking tools and the use of internal milestones to identify potential delays at an early stage. Participants highlighted the value of organising such exchanges both within participating organisations and at consortium level. Internal meetings can facilitate communication between researchers, project managers and administrative staff, while regular consortium and work package meetings can help identify delays, implementation risks and interdependencies before they affect overall project delivery.

Participants considered such monitoring important not only during the formal reporting phase, but throughout the entire project lifecycle. Regular exchanges provide opportunities to discuss emerging challenges, clarify responsibilities and agree on corrective measures before implementation issues become more difficult to address. In some consortia, efforts were also made to create clearer links between planned activities, deliverables and work package completion in order to facilitate project oversight and support reporting processes throughout the project lifecycle.

At the same time, workshop discussions suggested that monitoring should remain proportionate. Several participants reported efforts to adapt monitoring intensity to the size, complexity and risk profile of a project rather than applying identical approaches across all situations. Coordinators, work package leaders and project partners may require different types and levels of information depending on their responsibilities and exposure to project risks. Examples included distinguishing between essential and supplementary evidence and increasing oversight only where implementation concerns arise.

In the absence of established practices and extensive experience with lump sum projects, finding an appropriate balance between effective oversight and administrative burden was frequently described as challenging. Several participants therefore stressed the importance of explaining the purpose of monitoring activities clearly in order to strengthen acceptance among researchers and project partners and to avoid the perception that actual-cost procedures are simply being recreated under a different funding model.

### **4.3 Maintaining Evidence of Project Implementation**

Given the uncertainty surrounding the evidence required to demonstrate project implementation and work package completion, several organisations reported adopting more structured approaches to documentation and evidence management.

Rather than relying solely on documentation generated at reporting stages, some participants described maintaining ongoing records of implementation activities, project decisions and evidence related to deliverables and milestones. Examples included central repositories for technical documentation, deliverable-based evidence tracking, electronic laboratory notebooks, structured project archives and records of key project decisions.

Meeting minutes were frequently mentioned as a practical tool for documenting project implementation. Participants noted that minutes can provide a structured record of progress discussions, decisions taken, responsibilities assigned and agreed follow-up actions. Such records were considered useful not only for day-to-day project management but also for reconstructing implementation decisions and progress at a later stage if questions arise.

Several organisations also highlighted the importance of ensuring that relevant information remains accessible beyond the involvement of individual staff members. Centralised storage systems, documented handover procedures and systematic approaches to knowledge retention were therefore regarded as particularly valuable in environments characterised by staff turnover or changing project responsibilities.

## 4.4 Closer Cooperation Between Administrative and Scientific Functions

Participants frequently emphasised that lump sum funding requires close cooperation between administrative and scientific project functions. Since payments depend on successful project implementation rather than on reported expenditure, administrative staff require insight into project progress, while researchers need to understand the implications of the lump sum model for project management and reporting.

Several organisations reported using joint kick-off meetings and regular exchanges throughout project implementation to establish a shared understanding of responsibilities, monitoring arrangements and evidence requirements. Participants considered it important that communication continues throughout the project lifecycle rather than being limited to reporting periods.

Against this background, participants highlighted the importance of continuous communication with researchers. In particular, two aspects were repeatedly emphasised. First, participants stressed the need to explain how lump sum funding differs from actual cost funding. While financial reporting requirements are reduced, greater attention may need to be paid to project implementation, work package completion and the evidence needed to demonstrate progress.

Second, participants highlighted the importance of clarifying that simplifications at European Commission level do not necessarily remove institutional, national or audit-related documentation requirements. Several participants therefore emphasised the need to communicate these distinctions clearly in order to avoid misunderstandings and unrealistic expectations.

Participants further noted that close cooperation between administrative and scientific staff can be particularly valuable when preparing project reviews and periodic reports. Bringing both perspectives together was considered helpful for ensuring consistency between project implementation, reporting narratives and the supporting evidence available within the consortium.

## 4.5 Consortium Agreements as a Governance Tool

Participants frequently emphasised that consortium agreements play a particularly important role in lump sum projects. They were widely regarded as key governance tools for clarifying expectations, defining responsibilities and reducing uncertainty from the outset.

To address some of the specific features of lump sum funding, many organisations reported relying on the DESCA<sup>2</sup> model consortium agreement, which includes dedicated provisions for lump sum projects. Participants referred to a range of issues that can be addressed through consortium agreements, including internal reporting arrangements, staged transfers of pre-financing, procedures for assessing work package completion, amendment policies, and the redistribution of responsibilities and funding.

Several contributors highlighted the value of clearly defined governance and decision-making structures, particularly in situations where project implementation does not proceed entirely as planned. Frequently mentioned examples included procedures for assessing work package completion, escalation mechanisms for addressing underperformance and arrangements for

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<sup>2</sup> DESCA = Development of a Simplified Consortium Agreement – <https://www.desca-agreement.eu/what-is-desca/>

handling partner withdrawal or the redistribution of tasks within the consortium. The Work Package Leaders Group foreseen in the DESCA lump sum model was cited as one possible mechanism for supporting such decisions.

Participants also emphasised that consortium agreements should not be viewed solely as documents for project managers, legal departments or administrators. Researchers and principal investigators may equally benefit from understanding key provisions, particularly where decisions concerning work package completion, internal payments or changing responsibilities require scientific input.

Looking more broadly at cooperation within the consortium, participants also highlighted the bundling of several minor project changes into a single amendment as a pragmatic approach. Similar practices are commonly used in actual cost projects and were described as a way of limiting administrative effort while ensuring that significant changes are formally reflected in the Grant Agreement.

## **4.6 Connecting Pre-Award and Post-Award Experience**

Participants reported increasing interaction between pre-award and post-award support functions. Experiences gained during project implementation were increasingly seen as relevant for the preparation of future proposals and project structures.

Several organisations highlighted the value of using implementation experience to improve the design of future work packages, deliverables, milestones and monitoring arrangements. Lessons learned during project execution can help identify structures that facilitate implementation and make progress easier to assess, as well as highlighting project designs that create challenges in practice.

Organisations in which pre-award and post-award support functions are already closely connected often regarded this arrangement as an advantage for both proposal preparation and project implementation. Participants suggested that stronger feedback loops between proposal development and project management may support organisational learning and help refine internal approaches to lump sum funding as further experience accumulates.

## 5. Areas Where Practitioners Sought Further Clarification

The experiences presented in the preceding chapters gave rise to a number of recurring questions. While some of these reflect the fact that many organisations are still building practical experience with lump sum funding, participants also identified a range of issues stemming from a perceived lack of guidance, unclear rules and differing interpretations. Concerns were raised in particular where participants experienced inconsistencies in the assessment or application of procedures, creating uncertainty for beneficiaries and project consortia.

The discussions suggested that some uncertainties may diminish as **more practical experience** with lump sum projects becomes available, while others may benefit from **additional guidance** and greater **consistency** in interpretation. The following section consolidates these questions without proposing answers or policy recommendations.

### 5.1 Work Package Completion and Payments

Participants frequently discussed questions concerning the relationship between project implementation, work package completion and payments. While implementation-based reporting was welcomed in principle, uncertainties remained regarding the assessment of partial progress and incomplete work.

Recurring questions included:

- What constitutes sufficient evidence that a work package has been successfully completed? Who decides if the evidence presented is sufficient?
- How should situations be assessed where substantial work has been carried out but some planned activities, milestones or deliverables remain outstanding?
- How should participants calculate the percentage of work package completion without using financial data? How will the European Commission determine this percentage?
- How should internal payment arrangements be handled where individual beneficiaries have completed their contributions, but the work package as a whole is not yet considered completed?
- How should consortia deal with situations in which one partner's incomplete contribution affects the implementation of other beneficiaries' activities?
- To what extent can consistent approaches to assessing work package completion be expected across projects and reviews?

### 5.2 Reviews and Supporting Evidence

Although participants reported generally positive early experiences with project reviews, practical experience remains limited and expectations regarding supporting evidence were not always perceived as fully predictable. Questions therefore arose regarding the documentation that should be maintained throughout project implementation and the assessment process itself.

Recurring questions included:

- What types of supporting documentation may be requested during reviews?

- To what extent may expectations differ between reviewers, review panels or project officers?
- What evidence should institutions retain to document project implementation beyond immediate review requirements?
- How can institutions ensure that relevant evidence remains available and understandable throughout the project lifecycle and thereafter?
- What documentation practices are most appropriate when project responsibilities change over time?

### **5.3 Roles and Responsibilities Within Beneficiary Institutions**

Workshop discussions highlighted a perceived shift in responsibilities from financial reporting towards implementation monitoring and evidence generation. Participants therefore raised questions regarding the distribution of responsibilities between scientific, administrative and management functions.

Recurring questions included:

- How should responsibilities for documenting and confirming project implementation be allocated within beneficiary organisations?
- How can institutions ensure a shared understanding of the implications of implementation-related confirmations and statements?
- What forms of cooperation are most effective between scientific and administrative functions?
- How can institutions ensure continuity of knowledge, evidence and decision-making processes when staff members change?
- How can expectations regarding documentation and accountability be communicated effectively to project teams?

### **5.4 Consortium Governance and Coordinator Responsibilities**

The discussions also highlighted questions relating to consortium management and the role of coordinators under the lump sum model. Participants frequently noted that coordinators, work package leaders and consortium partners may have different information needs, responsibilities and perspectives on project risks.

Recurring questions included:

- What level of consortium-internal monitoring is necessary and proportionate in a lump sum project?
- How can coordinators obtain sufficient assurance regarding project progress without recreating extensive reporting systems?
- How should differing information needs and risk perspectives be balanced within the consortium?
- Which governance mechanisms are most helpful for managing implementation risks, delays and dependencies between partners?

- Which issues should be addressed explicitly in consortium agreements?

## **5.5 Budget Reallocation, Underspending and Project Changes**

Participants also identified a number of questions relating to project changes, budget reallocations and evolving implementation arrangements. These questions frequently arose in connection with changes in responsibilities, partner performance and consortium dynamics. Since the distribution of work package budgets among the partners is fixed in the Grant Agreement, these changes take on increased significance in lump sum projects.

Recurring questions included:

- How should anticipated underspending by individual beneficiaries be addressed within the consortium?
- How can additional resource needs elsewhere in the consortium be accommodated?
- Under which circumstances are formal amendments necessary, advisable or preferable to internal arrangements?
- How should changes in responsibilities or tasks within the consortium be documented?
- What approaches are appropriate when project implementation deviates substantially from the original plan?
- How should consortia address situations involving partner withdrawal, incomplete contributions or the redistribution of work?

## 6. Reflections on the Further Use of Lump Sum Funding

Workshop participants emphasised that experiences with lump sum funding continue to evolve as organisations gain further practical experience. While many participants acknowledged perceived simplifications compared to actual cost funding, discussions highlighted that the effects of the model are not entirely known yet. Also, they are not experienced uniformly across organisations, roles, or project types. Participants therefore stressed the importance of considering a broad range of practical perspectives when assessing the longer-term implications of the funding model.

At the same time, a live poll conducted during the workshop indicated broad support for continuing the use of lump sum funding in FP10. Almost half of respondents favoured a further expansion of lump sum funding, with just under one third supporting a future programme based exclusively on lump sum projects. More than one third preferred maintaining the current level, while only a small minority favoured a reduction or the complete discontinuation of the approach.

### 6.1 Simplification Is Not Experienced Equally Across Organisational Roles

Participants emphasised that the effects of lump sum funding are not experienced uniformly across an organisation. Perceptions of simplification often depended on the specific role, responsibilities and involvement of individuals in project implementation and management.

Experiences reported by financial officers, project administrators and coordinators participating in the workshop were not always identical. While some functions perceived a reduction in workload or administrative complexity, participants observed that new coordination, monitoring or documentation requirements could emerge elsewhere within the organisation. Consequently, simplification in one area was not necessarily perceived as simplification by all actors involved. However, as researchers were not represented among the workshop participants, the experiences of scientific staff could not be assessed directly.

Participants therefore suggested that the **impact of lump sum funding should be considered from an organisational perspective rather than through the experience of any single function**. The discussions highlighted that lump sum funding may reduce effort in some areas while creating new responsibilities in others, resulting in different perceptions of its overall effects across the organisation.

### 6.2 Experience Depends on the Role Within the Consortium

Participants also highlighted that experiences with lump sum funding can differ depending on an organisation's position within a consortium.

**Coordinators, work package leaders and project partners face different responsibilities** regarding project monitoring, information gathering and communication within the consortium. These differences may lead to distinct perceptions of both the benefits and challenges

associated with the funding model. Participants therefore noted that seemingly divergent views on lump sum funding do not necessarily reflect contradictions but may instead result from the different roles and responsibilities held within the same project.

### 6.3 Budget Flexibility May Be More Limited Than Expected

Several participants observed that the budget flexibility often attributed to lump sum funding may be limited in practice. In particular, the allocation of lump sum shares to individual partners in the Grant Agreement was seen as creating **expectations regarding ownership** of these shares, which **may reduce flexibility** when responsibilities or resource needs change during project implementation. Participants further noted that this may have implications for consortium dynamics.

While minor budget shifts in actual cost projects can be implemented without an amendment and are simply reflected in the financial reporting, lump sum projects offer less flexibility in this respect. In practice, **even minor reallocations may require an amendment to provide legal certainty** regarding the distribution of lump sum shares.

In situations requiring a redistribution of tasks, effort or resources, transparency, trust and a shared understanding among consortium partners were considered particularly important. Participants therefore suggested that the relationship between fixed budget structures, partner expectations and collaborative project management warrants further consideration in discussions on the future use of lump sum funding.

### 6.4 Funding Rules Alone Do Not Determine Simplification

Participants noted that organisational adaptation to lump sum funding is still ongoing in many institutions. As organisations continue to gain experience, internal procedures, support structures and approaches to project management are likely to evolve further.

At the same time, participants observed that the simplification potential associated with lump sum funding may not be realised to the same extent across all organisations. While the funding model reduces certain financial management requirements at programme level, **institutions often remain subject to institutional, audit-related or other compliance requirements** that continue to shape documentation, monitoring and risk-management practices. Participants therefore suggested that the practical effects of simplification will depend not only on the design of the funding model itself, but also on how it interacts with the wider organisational and regulatory environment in which beneficiaries operate.

Participants further noted that **achieving this transition itself requires time and resources**. Adapting internal procedures, guidance and administrative processes to a new funding model can create additional workload, particularly during the implementation phase. Since the EU is not the only funding body supporting these institutions, organisations often need to maintain different systems and processes in parallel in order to accommodate the requirements of multiple funders.

## 6.5 More Experience Is Needed Before Drawing Firm Conclusions

Participants agreed that a number of important questions can only be answered once more lump sum projects have reached completion.

Particular interest was expressed in gaining further experience with project closure procedures, situations involving incomplete work packages and the practical handling of budget-related challenges during implementation. Participants noted that expectations regarding reduced documentation and evidence requirements have not yet been fully tested in practice. Future experience with technical reviews and other control and audit activities was considered especially important.

As relatively few completed projects and review experiences are currently available, it remains **difficult to assess if and to what extent the simplification objectives** associated with lump sum funding **will materialise in practice**. Additional experience from completed projects will therefore be essential for evaluating the longer-term effects of the funding model and for developing a clearer understanding of its suitability and its operational implications.

## 7. Concluding Remarks

The experiences shared during this workshop provide an important practitioner perspective on the implementation of lump sum funding in collaborative research projects. While these observations cannot provide a comprehensive assessment of the funding model, they offer valuable insights into its practical implications across different organisational contexts and consortium roles.

The workshop further highlighted the value of *IGLO in Action* as a platform for exchanging implementation experiences. Participants emphasised the continued need for opportunities to learn from peers, discuss emerging challenges and share practical approaches to project management under evolving funding models. In this regard, IGLO's role as a facilitator of dialogue between practitioners and European stakeholders was widely appreciated.

At the same time, participants emphasised that important questions remain open. As experience with completed lump sum projects is still limited, further evidence will be needed to assess to what extent lump sum funding delivers simplification in practice, for whom it does so, and what role it should play alongside actual cost funding in future Framework Programmes. The observations presented in this report should therefore be understood as a contribution to an ongoing discussion rather than a definitive assessment of the funding model.