IGLO Implementation Working Group

Date:	19 October 2026, 14:00-16:00
Place of event:	Online
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Link to the summary report

Introduction: 3rd IGLO in Action on Lump Sum Funding: workshop and overview report

- **IGLO in Action format**: market niche, bringing together experts from IGLO office countries together, collect and exchange impartial and non-political feedback, experiences from practitioners on the benefits and drawbacks of lump sums, passing on to Brussels stakeholders – notably EC, EP, EUCO, EU Executive Agencies
    - **Strengthened perception of IGLO as a facilitator**
- 3rd edition reasoning – **increasing use of lump sums in HE**, the COMS's proposal for FP10 provides for lump-sum funding as the default mode. On the other hand, level of practical experience of institutions still very low. One question still unanswered – **are lump sums really a simplification? And for who?**
- Workshop was online, 80 participants, used breakout sessions, EC was present in listening mode
- Focus on administrative and financial aspects of implementing collaborative HE lump sum projects – reporting, amendments, record keeping, interaction with EC, consortium management, technical reviews and so on
- 200 applicants, 80 participants selected
- 2 Czech participants - ČZU, MUNI
- Report is finished. **Request to help with dissemination**. Presentation at BESTPRAC Conference in Split at the end of October

Results:

- **Financial reporting is a lot simpler** than in actual cost grants – no cost reporting, only finished work package reporting, simpler handling in Funding and Tenders Portal, no personnel cost calculation
- **Shift of focus towards project implementation and results** – as no financial information requested, focus is on technical progress, deliverables, milestones, implementation evidence, perceived as more meaningful by many. The attention of project management shifts to project itself
- **Positive early experiences** with project completion and reviews – project closure and final reporting largely straightforward, however, lack of experience with incomplete work package at final reporting

Perceived challenges: uncertainty in **demonstrating progress and work package completion** (what is a complete work package? What does 70% complete mean? Calculation, documentation? How to assess individual contribution of collaborating beneficiaries in same work package? How to allocate shares?), **limited reduction in documentation** and record keeping requirements (not necessarily reduced, sometimes increased, with documentation as a monitoring tool)

- Implementation challenges, shifting responsibilities and consortium dynamics
    - Researchers to demonstrate and confirm project implementation, differing perspectives on documentation responsibilities
    - Reporting and monitoring requirements vary between coordinators and partners
    - Increased responsibilities and management demands for coordinators
    - Challenges in managing budget reallocations and project changes

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Best practices for future:

- Designing work packages that are **realistic, achievable and sufficiently defined** + **clear allocation of responsibilities among partners** to avoid misunderstanding in **lump sum share**
- **Strengthen project monitoring** while keeping it **proportionate** – implementation meetings, interim progress updates, tracking tool for advancement on milestones, thus identifying potential delays
- **Maintaining evidence** – records of implementation activities, key project decisions and evidence related to deliverables in centralised storage systems, documented handovers
- Closer cooperation between administrative and scientific functions – better communication of documentation requirements, reporting expectations and implementation evidence should go both ways
- The **consortium agreement importance growing** compared to actual cost projects – more caution surrounding pre-financing through staged transfers, escalation mechanisms in cases of underperformance

Remaining open questions, further guidance from EC needed:

- Uncertainties regarding assessment of **partial progress / incomplete work packages**
- What documentation for reviews and supporting evidence? No consistent practice

Reflections on further use of lump sum funding:

- Not experienced the same way across organisations and roles – simplification observed for purely financial roles, increased workload for more overarching roles
- Experience depends on role
- **Long-term effects not fully known yet**
- Budget flexibility may be more limited than expected – tendency to consider work package shares as “property” of respective beneficiary
- More experience needed before drawing firm conclusions – more complete data when more lump sum projects have been completed and when substantial audit experience has been gathered

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