



Key Performance Indicators (KPIs) Reporting Tool Frequently Asked Questions (FAQs)

Version history

2.0	30 May 2024	Bulk delete of services added
1.9	06 March 2024	1.16 updated
1.8	13 Feb. 24	Updated to match phrasing of FAQ on website
1.7	17 January 2024	Format updated

Document created by



Table of Contents

1. KPI Framework and Methodology	4
1.1. How often should the data be reported on the tool?	4
1.2. When is the indicator status checked? At M18 and M36 (per the Grant Agreement) or annually per the DTA monitoring table?	4
1.3. Who has access to the tool?	4
Any member of the EDIH with access to the platform will be able to visualise and edit data. Member States representatives are also granted a separate access in order to view data from EDIHs in their respective country. EC and DTA with authorized access also have access to visualise the data.	4
1.4. Is the registered data visible to everyone?	4
1.5. Will the tool be translated in all EU languages?	4
1.6. Is the DMA creation necessary before registering a new service?	4
1.7. Why am I receiving an error message in "Reporting of EDIH services delivery" despite being a registered company with the Chamber of Commerce?	5
1.8. Do service statuses need to be updated?	5
1.9. Under which categories can we register preparation and delivery services? Can we choose the best fitting category?	5
1.10. What constitutes "1 training" in the planning system? Can a person or a company appear in the plan multiple times?	5
1.11. How will collaborations with other EDIHs affect our KPIs?	5
1.12. Can multiple EDIHs combine sources for larger projects?	5
1.13. Must events be reported in the EDIH portal if dissemination and communication activities are already reported in the EC tenders and funding portal?	5
1.14. How can we update the EDIH's price list due to new event reporting information?	5
1.15. How should we declare events like monthly webinars (costing 0 euro but fully granted) with 20-30 participants?	6
1.16. What information should be included for event attendees and how should participation at online/hybrid events be documented?	6
1.17. How should collaboration with EEN for events be reported: In Events, collaboration or in both?	6
1.18. In Spain, where companies are invoiced for technological services for the full cost amount, but SMEs only pay the VAT, what do we have to put in "value billed"?	6
1.19. Is reporting the value of the services provided to a PSO necessary?	6
1.20. Can one client appear multiple times in the set targets (between categories and within categories)?	6
1.21. If there's a gap between planned and completed services (e.g. 40 planned, 30 completed), should this gap of 10 be transferred in the "allocation of services" yearly tab?	6
1.22. How do EDIHs correctly enter a format such as a workshop?	7
2. Definitions	7
2.1. How do you define an event?	7

2.2.	Who falls under the category of external stakeholder?	7
2.3.	Is the DMA considered a service?.....	7
2.4.	Are mass education or training sessions considered events?	7
3.	Technical aspects of the KPI Tool.....	7
3.1.	Is there an option to directly upload content or is it only manual?	7
	Yes, it is now possible to upload information regarding "Reporting of EDIH services delivery" via csv.	7
3.2.	How can SMEs and PSOs be uploaded in bulk on the EDIH Network's website?	7
3.3.	What format is used for exported data and can it be used in national tools like Airtable?.....	8
3.4.	Where can we find the Excel template for direct data upload?	8
3.5.	Can all EDIHs in Croatia enter the same SME or PSO for different services provided?	8
3.6.	Where can we register other KPIs like "amount of additional investments triggered"?	9
3.7.	Is it possible to have an "Author" column in the downloaded data for verification?	9
3.8.	Can the import functionality be implemented in all sections, not just the "Reporting of EDIH services delivery"?	9
3.9.	Can additional fields be added when registering the technology type or sector?	9
3.10.	Can I register two units or two services, from one unique company or public sector organisation, as two different customers?	9
4.	Requirements and limitations related to reporting.....	10
4.1.	What happens if planned target figures aren't met at a checkpoint?	10
4.2.	Are there limitations based on an EDIH's country of origin for collaborations?	10
4.3.	Can collaborations occur with other EU-funded projects (e.g. SKIIVE)?	10
4.4.	Are there limitations on providing services to customers from non-EU countries?.....	10
4.5.	Can non-EU SMEs be included in projects alongside EU SMEs?	10
4.6.	Are EDIHs with national funding (Seal of Excellence) obligated to use the.....	10
4.7.	State aid for beneficiaries.	11
4.8.	The EDIH service price list has been revised since the Grant Agreement was signed at the start of the project. Which prices should be indicated?	11

This document provides answers to a list of Frequently Asked Questions (FAQs) related to the implementation of the Key Performance Indicators (KPIs) reporting Tool. In the document we aim to cover most of the questions received from EDIH representatives from channels such as: email queries received by the DTA Helpdesk and/or Commission staff and the ones received during the KPI webinar and Annual Event.

You are kindly asked to check thoroughly the FAQ document before addressing any question regarding the reporting of KPIs.

1. KPI Framework and Methodology

1.1. How often should the data be reported on the tool?

Although the frequency of reporting is not predefined, we would encourage you to report data related to delivered services, collaborations and events continuously (and at least monthly). In any case, it is, mandatory to update the data in preparation for the review meetings at month 18 and 36, as stated in the Grant Agreement.

1.2. When is the indicator status checked? At M18 and M36 (per the Grant Agreement) or annually per the DTA monitoring table?

KPIs will be checked individually (for each EDIH case by case) only at M18 and M36 by the EC, based on the targets agreed in the grant agreement. The data collected thanks to the KPI tool will also be used by the DTA for the annual impact assessment reports, which will focus on monitoring the performance of the whole EDIH Network, and related trends.

1.3. Who has access to the tool?

Any member of the EDIH with access to the platform will be able to visualise and edit data. Member States representatives are also granted a separate access in order to view data from EDIHs in their respective country. EC and DTA with authorized access also have access to visualise the data.

1.4. Is the registered data visible to everyone?

No. The registered data will be visible to the members of the respective EDIH. EC and DTA staff with authorized access will be able to view all records, while authorized MS Member States representatives will be able to view data of EDIHs from the respective country.

1.5. Will the tool be translated in all EU languages?

No. The online reporting tool and related explanations are only available in English, as the KPI tool is designed to be used by the EDIHs, not by their customers.

1.6. Is the DMA creation necessary before registering a new service?

No, the DMA is not a prerequisite to register a new service, but the registration of the customer is.

1.7. Why am I receiving an error message in "Reporting of EDIH services delivery" despite being a registered company with the Chamber of Commerce?

Even though the company is registered to the Chamber of Commerce, you need to register any customer in the KPI portal/reporting system.

1.8. Do service statuses need to be updated?

Yes. If the service is registered as "Ongoing", once it is finalised and invoiced the status of the registered service should be updated, along with all other relevant updates to the recorded data.

1.9. Under which categories can we register preparation and delivery services? Can we choose the best fitting category?

Yes, the EDIHs are expected to register each substantial service under the most fitting Service category. The four service category options are not subject to any update.

1.10. What constitutes "1 training" in the planning system? Can a person or a company appear in the plan multiple times?

One training is provided to one customer: SME or PSO, without regard to the number of attendees. If you provide several trainings to the same customer (SME/PSO as a whole and not the number of participants), each of these trainings should be reported separately. One training reported corresponds to one training case with one customer.

1.11. How will collaborations with other EDIHs affect our KPIs?

Services provided in collaboration can be counted and registered as KPI for both (all) EDIHs involved.

1.12. Can multiple EDIHs combine sources for larger projects?

Yes, you can collaborate and e.g., share infrastructures with other EDIHs, to improve the impact. Such cooperations should be reported under EDIH Collaboration. On the other hand, the reporting of all substantial interventions/services to SMEs (or PSOs) should be treated on individual basis, per customer. This will include both DMA performance and reporting of service-related information (KPIs).

1.13. Must events be reported in the EDIH portal if dissemination and communication activities are already reported in the EC tenders and funding portal?

If you are an EDIH funded by Digital Europe, using the DTA tool is mandatory, because of the need to have all the data in one database. However, you will be able to use your CRM tool for example and then import the data in the DTA tool.

1.14. How can we update the EDIH's price list due to new event reporting information?

The price list can be changed, but as it is part of the Grant Agreement, this means that, in principle, a grant amendment is needed. The EDIH should contact the Project Officer to agree on how to proceed, on a case-by-case basis.

1.15. How should we declare events like monthly webinars (costing 0 euro but fully granted) with 20-30 participants?

Events are services just like the others, whatever is the number of participants or the objective. The only difference is that, if your national legislation allows it, you can record them as zero-value services - for the European Commission this is perfectly acceptable.

1.16. What information should be included for event attendees and how should participation at online/hybrid events be documented?

The list of attendees is not a mandatory field to fill in when reporting an event. You just need to communicate the number of attendees and the delivery mode. You are free to share the data of the participants if you find it relevant, and if the GDPR is respected, using the most suitable type of file.

You can find the general guidelines on GDPR on the platform, [here](#).

1.17. How should collaboration with EEN for events be reported: In Events, collaboration or in both?

Registered EDIH collaborations are typically on a strategic level and more ample than the co-organisation of one event: it means a long-term partnership. Depending on the context, you could fill in the “collaboration with other stakeholders” tab. However, when we are talking about an occasional event where the EEN participated, it makes more sense to register it simply as an event.

1.18. In Spain, where companies are invoiced for technological services for the full cost amount, but SMEs only pay the VAT, what do we have to put in “value billed”?

The value billed should be the value of the invoice sent to the SME, so in this case it should be the full cost amount.

1.19. Is reporting the value of the services provided to a PSO necessary?

In the case of services provided to public entities, it is not mandatory to report the value to be declared as State Aid. The price of the services are not relevant for the public sector (state aid does not apply).

1.20. Can one client appear multiple times in the set targets (between categories and within categories)?

Yes, one customer can appear several times between and within categories in the target section. And then, every actual service provided to one customer corresponds to one line in the tool.

1.21. If there's a gap between planned and completed services (e.g. 40 planned, 30 completed), should this gap of 10 be transferred in the “allocation of services” yearly tab?

Regarding the services: under the last tab of the tool (allocation of services), you should always fill in the expected services, meaning the one you agreed and signed with the EC (in your example the targeted 40 test before invest). We advise you to fill it once, when starting to use the tool. Then, it will just help you to monitor and compare with the services you are actually performing, to see how close you are from reaching the objectives. On the first KPI tab (reporting of services delivery), you need to fill in one by one the actual services you perform, even if they don't match the objectives.

1.22. How do EDIHs correctly enter a format such as a workshop?

In relation to the reporting of workshops, "customer" in the context of service delivery corresponds to an SME/PSO, not to individuals. If you are reporting a workshop given to one customer, with 30 attendees from this one customer, you should report it under Training and skills development and record 30 as the number of attendees (although the number of attendees is not a mandatory field). On the other hand, if the workshop consists of an event with the attendance of 30 different customers (30 separate SMEs/PSOs) then you should report it under "Reporting of EDIH's events" with the number of attendees as 30.

2. Definitions

2.1. How do you define an event?

A reported event can be any kind of activity organized in the context of the EDIH and thanks to the project's funding (e.g., workshop, webinar or road show). Events are "just like services", but normally delivered to many customers (not necessarily registered) and may be considered as "zero value" in terms of State Aid.

2.2. Who falls under the category of external stakeholder?

Any kind of relevant collaboration partner which is not an EDIH, e.g., EEN. Note that EDIH Collaboration reporting only refers to external stakeholders, not to partners within the EDIH.

2.3. Is the DMA considered a service?

Yes, the digital maturity assessment of a customer is a service, which can fit any of the categories listed, depending on the context.

2.4. Are mass education or training sessions considered events?

If it's something done in the context of the EDIH activity and thanks to the funding, then yes.

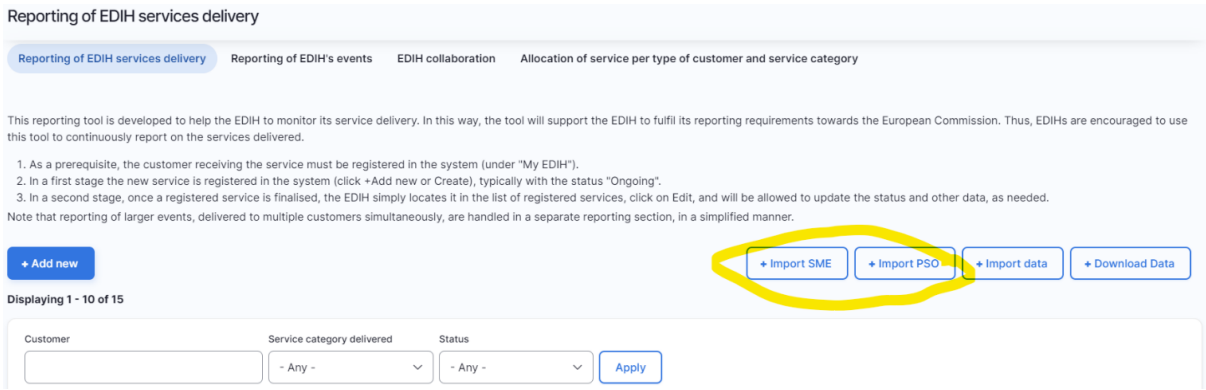
3. Technical aspects of the KPI Tool

3.1. Is there an option to directly upload content or is it only manual?

Yes, it is now possible to upload information for all tabs such as "Reporting of EDIH services delivery", "Reporting of EDIH's events", etc. via csv.

3.2. How can SMEs and PSOs be uploaded in bulk on the EDIH Network's website?

You are currently able to bulk upload customer (separate documents for PSO and SME) through the main table of the KPI tool.



Once you do that, the customer will appear in the register and you will have the possibility to register KPI related data and also to start a T0- assessment under the DMA section.

3.3. What format is used for exported data and can it be used in national tools like Airtable?

The KPI data is exported (downloaded) in XLS format.

3.4. Where can we find the Excel template for direct data upload?

The csv templates are available on the Knowledge Hub under Guidance Documents: [Overview - KPI Reporting Tool | European Digital Innovation Hubs Network \(europa.eu\)](#). Alternatively, if you already have some data registered in the tool, when you click to Download data you will get access to the Excel file, which will also serve as a template for uploading data.

3.5. Can all EDIHs in Croatia enter the same SME or PSO for different services provided?

The sharing of customer is now available. If you try to create a SME or PSO to perform a Digital Maturity Assessment (DMA) or record Performance indicators, and the SME or PSO is already created by another EDIH, you will receive the following message: "This fiscal registration number corresponds to an SME/PSO that is already registered with another EDIH. You may request access to this SME/PSO by contacting the helpdesk." You need to click on the hyperlink that will appear in order to inform the DTA Helpdesk and request to be added as an associated EDIH for that customer.

3.6. Where can we register other KPIs like "amount of additional investments triggered"?

When you register a new service and choose the category "Support to find investment", two new fields automatically appear (see image to the right):

- "Amount of investment triggered (€)" and
- "Type of investment".

The screenshot shows a form with three main sections:

- Service category delivered ***: A dropdown menu with "Support to find investment" selected. Below it, a note says "Select the service category delivered from the dropdown list".
- Amount of investment triggered (€)**: A text input field containing "10000". Below it, a note says "Total amount of investment triggered by the service provided".
- Type of investment**: A dropdown menu with "None" selected. The dropdown list is open, showing options: "- None -", "Loan - bank", "Loan - private (company)", and "Loan - public".

3.7. Is it possible to have an "Author" column in the downloaded data for verification?

Yes, the "Author" column has been added.

3.8. Can the import functionality be implemented in all sections, not just the "Reporting of EDIH services delivery"?

Yes, as per 3.1, it is now possible to upload information for all tabs such as "Reporting of EDIH services delivery", "Reporting of EDIH's events", etc. via csv.

3.9. Can additional fields be added when registering the technology type or sector?

No, the technologies and sectors are based on the lists used in the EDIH catalogue and are not foreseen to be updated.

3.10. Can I register two units or two departments, from one unique company or public sector organisation, as two different customers?

The registration of a customer in the KPI tool relies on the customer's name and VAT number, which have to be unique. This prevents the double entries for a single customer and therefore, also prevents the registration of one company's specific department or unit as a separate customer.

This is due to the fact that the KPIs and DMA results, according to the methodology, should be linked to one SME or PSO only; for example, the DMA should be done on organisational level, not on department level.

3.11. Is there an option to bulk delete services?

1. A bulk delete option is available **that deletes all service KPI data**.

- At the **bottom** of the table there is now the option to select and delete everything.

ected Select / deselect all results (all pages, 2791 total):

- This will remove data added by hand and by CSV.
 - Once all the data are deleted, then a new CSV with all the information can be uploaded
2. Automated duplicate check: **If all the values of the record are identical** with an existing record uploaded, then **the record is ignored**.

4. Requirements and limitations related to reporting

4.1. What happens if planned target figures aren't met at a checkpoint?

EDIH projects will be reviewed by external experts at the periodic review meetings (month 18 and month 36), the situation will be assessed and the EDIH will have the opportunity to justify deviations.

4.2. Are there limitations based on an EDIH's country of origin for collaborations?

There is no limitation considering entities giving in-kind contributions, e.g., participating as associated partners or third parties bearing their own costs (not recipients of EU funding). Main participants of the consortium (beneficiaries) are limited to those described in the Grant Agreement.

4.3. Can collaborations occur with other EU-funded projects (e.g. SKIIVE)?

There is a strict prohibition of double funding from the EU budget (except under EU Synergies actions: ERDF and RRF). Outside such Synergies actions, any given action may receive only ONE grant from the EU budget and cost items may under NO circumstances declared to two different EU actions.

4.4. Are there limitations on providing services to customers from non-EU countries?

Yes, there is a limitation. The Digital Europe Programme does not allow countries outside the EU and Associated Countries (Liechtenstein, Iceland and Norway) to benefit from the funding.

4.5. Can non-EU SMEs be included in projects alongside EU SMEs?

Targeted stakeholders include both companies (SMEs and small mid-caps) and public sector organisations (PSO). The Digital Europe Programme does not allow countries outside the EU and Associated Countries (Liechtenstein, Iceland and Norway) to benefit from the funding. SME from non-EU countries can thus not receive the same benefits (e.g., price reduction) as those from EU-countries.

4.6. Are EDIHs with national funding (Seal of Excellence) obligated to use the tool?

The European Commission would encourage also Seal of Excellence (SoE) EDIHs to use the reporting tool but its use is not mandatory for them. SoE EDIHs are advised to discuss with their respective national authority what they would prefer.

4.7. State aid for beneficiaries.

There are different approaches depending on the MS, all of which are compatible with the regulation. All these problems are being solved with time. We recommend to contact your project officer in order to have a clearer view on this issue.

4.8. The EDIH service price list has been revised since the Grant Agreement was signed at the start of the project. Which prices should be indicated?

It would make indeed more sense to fill in the actual updated prices you will invoice. However, the EC should be notified about it and the updated prices need to be agreed. We would advise you, if you haven't done so yet, to inform your Project Officer and ask her/him for advice on this issue.