

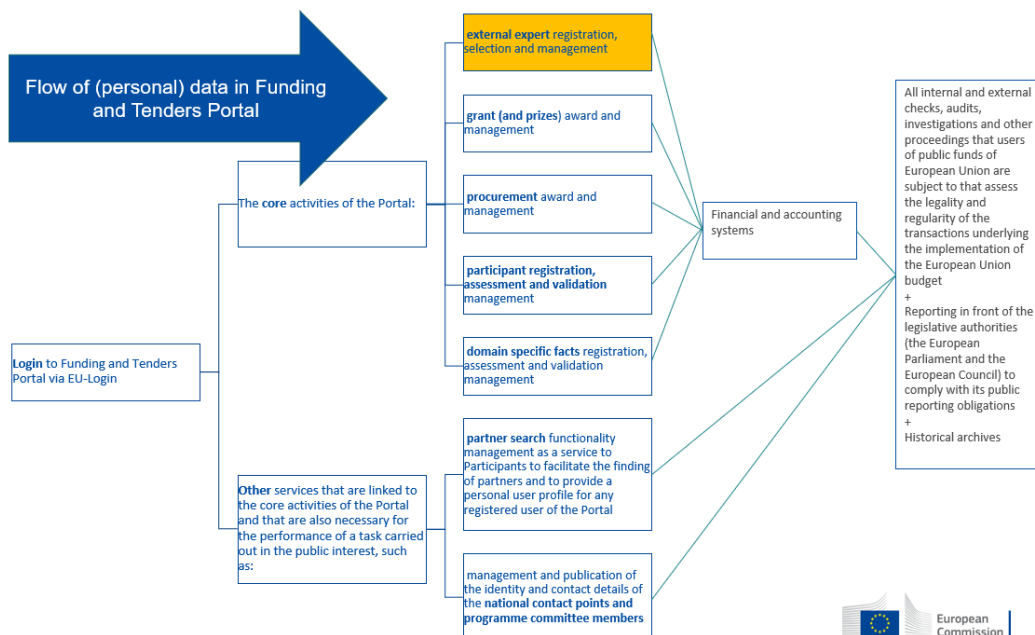
# PRIVACY STATEMENT FOR EXPERT DATA MANAGEMENT

## 1. Introduction

The Joint Controllers<sup>1</sup> are committed to protect your personal data and to respect your privacy. The Joint Controllers collect and processes personal data pursuant to [Regulation \(EU\) 2018/1725](#)<sup>2</sup>.

The scope of this privacy statement covers personal data collected via the EU Funding & Tenders Portal (and the EU Funding & Me mobile application; hereinafter together “the Portal”) and the related processing operations undertaken by the Joint Controllers for the purpose of managing expert registration, selection and management in both – direct and indirect – management.

The figure below gives an overview of the flow of personal data through the various business processes served by the Portal:



## 2. Why and how do we process your personal data?

### Purpose of the processing operation:

<sup>1</sup> The Joint Personal Data Controllers (hereinafter “**the Joint Controllers**”) are all European Union institutions, bodies, offices and agencies (hereinafter commonly referred to as “**the EUIBAs**”) who are parties to the Joint Controllership Arrangement of the Portal (hereinafter “**the JCA**”) and who process the personal data collected by the Portal business processes. The full list of Joint Controllers is available [here](#).

<sup>2</sup> Regulation (EU) 2018/1725 of the European Parliament and of the Council of 23 October 2018 on the protection of natural persons with regard to the processing of personal data by the Union institutions, bodies, offices and agencies and on the free movement of such data (OJ L 295, 21.11.2018, p. 39) (hereinafter “**Regulation (EU) 2018/1725**” or “**the Regulation**”).

The Joint Controllers collect and use your personal information to execute the Portal business processes for experts in the funding programmes, activities and in procurements managed by the European Union institutions and bodies.

This privacy statement covers the processing of personal data across all electronic and paper-based transactions linked to the Portal (including through the EU Funding & Me mobile application). It focusses on the business-processes and therefore abstracts from the underlying IT architecture.

The Portal business processes are:

- i. the core activities of the Portal, that are:
  - **expert registration, selection and management**
  - grants and prizes award and management
  - procurement award and management
  - participant registration, assessment and validation management and
  - domain specific facts registration, assessment and validation management.
- ii. other services that are linked to the core activities of the Portal and that are also necessary for the performance of a task carried out in the public interest, such as:
  - partner search functionality management as a service to Participants to facilitate the finding of partners and to provide a personal user profile for any registered user of the Portal;
  - management and publication of the identity and contact details of the national contact points and programme committee members.

For all these business processes, the privacy statement covers the entire life cycle of linked personal data processing operations including (but not limited to) registration, accreditation, application, selection, evaluation, validation, entry into and monitoring of relevant type of legal commitment and all linked financial transactions. Limited categories of personal data may be used for communication activities, such as communication actions on Portal updates and service-related initiatives. The privacy statement also covers all internal and external checks, audits, investigations and other proceedings, that users of public funds of European Union are subject to, to assess the legality and regularity of the transactions underlying the implementation of the European Union budget. The audit and control activities can be conducted at any time during the performance of the programme / contract / project, as well as thereafter, and can concern any aspect, depending on the needs of the Joint Controller. The privacy statement covers both external and internal data subjects.

The Joint Controllers may use limited personal data obtained through the Portal for the purposes of monitoring, evaluating, and improving their programmes and initiatives; to account for these in front of the legislative authorities (the European Parliament and the European Council); to comply with their public reporting obligations; and as a source of information for policy-making.

Your personal data will not be used for an automated decision-making. Your data may be used to train and test AI-driven models for enhancing and refining the expert data base (e.g. to suggest matching profiles to the EU services, see [FTP AI information](#)).

**Related processing operations:**

The following further processing operations working with personal data collected through the Portal are listed below with their separate data protection records and privacy statements:

- i. European Commission's **Identity Access Management Service (IAMS)**, including EU-login, enabling registration and access to the Portal to internal and external users (data subjects). (link to record: <https://ec.europa.eu/dpo-register/detail/DPR-EC-03187>)
- ii. **Accounting system**: registration of legal entity and bank account records in the central European Commission accounting system for enabling financial transaction vis-a-vis third parties (including Experts), (link to record <https://ec.europa.eu/dpo-register/detail/DPR-EC-00301>)
- iii. Management and (short- and medium-term) **preservation of documents** (link to record: <https://ec.europa.eu/dpo-register/detail/DPR-EC-00536>)
- iv. Long-term preservation of the **archives**: notwithstanding the above retention periods: in the rare occurrence that a file is selected or sampled at the end of retention period, some data may be retained in the European Commission's Historical Archives as required by the Archives Regulation (Council Regulation No. 354/83). (link to record: <https://ec.europa.eu/dpo-register/detail/DPR-EC-00837>)
- v. **Early Detection and Exclusion System (EDES)**: a database for protection of the EU financial interests by means of detection of risks and imposition of administrative sanctions (link to record: <https://ec.europa.eu/dpo-register/detail/DPR-EC-04410>)
- vi. The European Research Council has specific further personal data protection processing regarding expert selection and management and grant award and management. These further processing operations are detailed in <https://erc.europa.eu/records-register>

**3. On what legal ground(s) do we process your personal data for expert registration, selection and management**

We process your personal data, because:

- a. processing is necessary for the **performance of a task carried out in the public interest** or in the exercise of official authority vested in the European Union institution or body (Article 5(1)(a) of Regulation (EU) 2018/1725) and/or
- b. processing is necessary for **compliance with a legal obligation** to which the Joint Controller is subject (Article 5(1)(b) of Regulation (EU) 2018/1725) and/or
- c. processing is necessary for the **performance of a contract** to which the data subject is party or in order to take steps at the request of the data subject prior to entering into a contract (Article 5(1)(c) of Regulation (EU) 2018/1725)

- d. You have given **consent** to the processing of your health data under specific circumstances<sup>3</sup>(Article 5(1) of Regulation (EU) 2018/1725).

The **specific legal bases** applying to the processing referred above under (a) and (b) are:

- [Regulation \(EU, Euratom\) 2024/2509](#)<sup>4</sup> and in particular: Title V (Common Rules), Title VII (Procurement and Concessions), Title VIII (Grants), Title IX (Prizes), Title XII (Other Budget Implementation Instruments, including management of experts and participant registration, assessment and validation) and Annex I (Procurement).
- The financing decisions form part of the legal basis for a processing operation, where applicable, in line with Article 110 of the Financial Regulation.
- Union law setting up specific funding programmes and initiatives is providing further legal basis for personal data processing, but making reference to the Financial Regulation for actual implementation mechanisms.
- Union law establishing the EUIBAs as Joint Controllers.

#### 4. Which personal data do we collect and further process?

The Joint Controllers collect and process the personal data that the data subject (or his/her representative) has submitted via the Portal by filling in data fields of IT-systems / applications or by providing supporting documentation (e.g. in format of PDF documents, scans) when using the relevant business process functionality of the Portal.

As the information included in the individual experts profiles in the database is based on self-declared information and has not been validated by any internal service, during the selection of experts further checks might be performed on (non) publicly available sources and databases.

##### **Data categories and fields:**

The personal data that is processed for expert registration, selection and management processing by the Portal is the following:

##### **[I] Identification data:**

- (1) first, middle and last name (including maiden name)
- (2) gender
- (3) title
- (4) personal data contained in different types of identification documents (date and place of birth; nationality; personal (national) identification number)

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<sup>3</sup> Health data can be processed if an expert's temporary/permanent disability requires them to be occasionally accompanied (the accompanying person is eligible to receive accommodation and daily allowances, and reimbursement of travel expenses) or for triggering a change of contractual conditions (contract suspension/amendment).

<sup>4</sup> Regulation (EU, Euratom) 2024/2509 of the European Parliament and of the Council of 23 September 2024 on the financial rules applicable to the general budget of the Union (hereinafter "the Financial Regulation") (OJ L2024/2509, 26.09.2024, ELI <http://data.europa.eu/eli/reg/2024/2509/oj>).

- (5) expert display name
- (6) other person identifiers linked to other sources (ORCID/Researcher ID)
- (7) expert candidature reference

**[II] Contact data:**

- (1) e-mail
- (2) contact (phone) numbers (personal; business; mobile GSM; landline; fax; voice over IP)
- (3) personal address(es) submitted (such as origin; permanent/current/previous residences)

**[III] Education related data**

- (1) educational background (names of institutions; titles; qualifications; academic/research records; academic qualifications)
- (2) (areas of) expertise and technical skills
- (3) language(s) spoken
- (4) personal data embedded in/stemming from publications

**[IV] Employment related data:**

- (1) current employment status (employer's name and address; employer's type; employer's website; department; function/position; staff category)
- (2) employment history (any previous employment, including career breaks; total number of years of experience; start and end dates of employment periods; link to CV in an outside data source; information related to other former experience, including on former assistance to the EUIBA and peer review experience)
- (3) work assignments/roles given in IT systems and the role(s) of the data subjects in them

**[V] Financial data:**

- (1) bank account related data (account number; name and address of the holder; name and address of the bank; available funds)
- (2) tax related data (VAT number and registration)
- (3) total amount of fees paid to an Expert by the EUIBA

**[VI] Data necessary for management of procedural/evaluation/performance related aspects:**

- (1) eligibility criteria related personal data
- (2) exclusion criteria related personal data
- (3) selection criteria related personal data
- (4) performance related personal data linked to the execution of the expert contract (report

submission; information linked to participation to meetings; health conditions if relevant; etc.)

(5) any other procedural (application; evaluation process related) data that is of personal nature and linked to points listed above

#### **[VII] Authentication and access data:**

(1) EU Login credentials

(2) IP address

(3) security data/log in files

#### **[VIII] Incidental and unsolicited data:**

(1) third parties personal data (the supporting documents submitted by the data subjects may contain personal data of third parties (other researchers or experts mentioned in proposals; board members) not necessary for the present purposes of processing

(2) data revealing racial/ethnic origin; political opinions; religious/philosophical beliefs; trade union membership; sexual orientation - if these data appear in the documents (CVs; ID documents; other documents) provided by the data subjects.

The data categories listed above are exhaustive, but the listed data fields are non-exhaustive.

### **5. How long do we keep your personal data?**

The Joint Controllers only keep your personal data for the time necessary to fulfil the purpose of collection or processing, namely for the following periods:

<b>Data category</b>	<b>Retention period</b>	<b>Start date/moment</b>	<b>End date/moment</b>
<b>Expert management</b>	For contracted Experts	End of MFF during which the legal commitment was signed (N)	N+10 years
	For registered, but not contracted Experts	End of MFF during which the experts' list was established (N)	N+5 years
	For the Expert's delegated actors	Identical with the retention period applicable to the personal data of the respective delegating expert	

### **6. How do we protect and safeguard your personal data?**

All **personal data in paper format** is stored in the premises of European Union institutions, bodies, offices and agencies, access to which is controlled by access policies based on Commission Decision (EU, Euratom) 2015/443 on Security in the Commission (link to European Union law database: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32015D0443>). The paper files are stored in locked/secure cupboards and/or storage offices. Access is limited and is on a need-to-know basis.

All supporting front and back-office IT systems (and thus all **personal data in electronic format**: e-mails, documents, databases, uploaded batches of data, etc.) for any of the Portal business areas are stored within the Portal IT-ecosystem that in turn is located in European Commission's data centre. Its servers are located on the territory of the European Union. All European Commission IT systems (i.e. all communication and information systems) which are owned, procured, managed or operated by or on behalf of the European Commission or are used by the European Commission are compliant with the Decision (EU, Euratom) 2017/46 of 10 January 2017 on the security of communication and information systems in the European Commission (link to European Union law database: <https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX%3A32017D0046>).

In order to protect your personal data, the European Commission has put in place a number of **technical and organisational measures**. Technical measures include appropriate actions to address online security, risk of data loss, alteration of data or unauthorised access, taking into consideration the risk presented by the processing and the nature of the personal data being processed. Organisational measures include restricting access to the personal data solely to authorised persons with a legitimate need to know for the purposes of this processing operation.

## **7. Who has access to your personal data and to whom is it disclosed?**

### **Within the European Union organisation (the Joint Controllers / the EUIBA) a recipient may be:**

- i. any **legal person that is an EUIBA** who works with the Portal processing operations covered by this privacy statement or is entitled by law and
- ii. any legal or **natural person who is in a contractual relationship with an EUIBA** who works with the Portal processing operations covered by this privacy statement based on the need-to-know principle.

*Such as: staff of European Union institutions and bodies, experts and staff of contractors.*

### **Outside the European Union organisation a recipient may be:**

- i. any legal or natural person to whom the EUIBA is under **regulatory duty** or **who needs it in the public interest** and the recipient needs it for **legitimate performance of tasks within its competence**.

*Such as: Only for monitors: the coordinator/beneficiaries of EU funded projects.*

- ii. any legal or natural person who has a **contractual relationship** with an EUIBA and who is working on behalf of and under the responsibility of the Controllers for the purposes of performing the tasks of the relevant contract or has a need-to-know stemming from the contract.

*Such as: staff of contractors acting as processors for a specific processing operation (auditor, event organiser) external auditors / contractors carrying out financial verifications, etc.*

### **Further specific disclosure:**

- i. Specifically for **expert management**: access may be given, on request, to certain research institutions (funding organisations), who participate in the European

Research Area; and in case of experts for project monitoring: the coordination/beneficiary in grant agreement; certain personal data of experts is published online according to EC horizontal rules on expert groups: (available: [https://ec.europa.eu/transparency/regexpert/PDF/C\\_2016\\_3301\\_F1\\_COM\\_MISSION\\_DECISION\\_EN.pdf](https://ec.europa.eu/transparency/regexpert/PDF/C_2016_3301_F1_COM_MISSION_DECISION_EN.pdf)).

- ii. Further specifically for the **expert management**, their role in panel (chair or member, etc.) may be published online if required by legal basis.
- iii. Specifically for **certain programme / initiative related publication online**, such as: film directors' names for "MEDIA", contract details of professors for "Jean Monnet", ERC principal investigators, etc. These are either participation conditions of the programme or based on data subject's consent – the recipient is general public (online).
- iv. Finally, in accordance with the Financial Regulation (particularly Article 38 et al), certain information on recipients of EU funds are published annually on the Europa webpage **(Financial Transparency System: [https://ec.europa.eu/budget/fts/index\\_en.htm](https://ec.europa.eu/budget/fts/index_en.htm); the Official Journal of the European Union and/or on the applicable website of the EUIBA).**
- v. Pursuant to Article 3(13) of Regulation (EU) 2018/1725, public authorities which may receive personal data in the framework of a particular inquiry in accordance with European Union or Member State law shall not be regarded as recipients. The further processing of those data by those public authorities shall be in compliance with the applicable data protection rules according to the purposes of the processing.

### **International data transfers:**

The Operational Controllers may transfer your personal data to recipients in a third country or to an international organisation in accordance with Regulation (EU) 2018/1725.

Detailed information on the categories of recipients and the legal ground for the transfer related to the expert tasks is available [here](#).

### **8. What are your rights and how can you exercise them?**

You have specific rights as a 'data subject' under Chapter III (Articles 14-25) of Regulation (EU) 2018/1725, in particular the right to access, your personal data and to rectify them in case your personal data are inaccurate or incomplete. Where applicable, you have the right to erase your personal data, to restrict the processing of your personal data, to object to the processing, and the right to data portability. If you have further questions regarding adequacy decisions and appropriate safeguards (or want to obtain a copy) in case of international data transfers, this can be provided upon request to the competent Joint Controller.

You have the right to object to the processing of your personal data, which is lawfully carried out pursuant to Article 5(1)(a) of Regulation (EU) 2018/1725 on grounds relating to your particular situation.

You can exercise your rights by contacting the competent Joint Controller, or in case of conflict the relevant Data Protection Officer. If necessary, you can also address the European Data Protection Supervisor.



Where you wish to exercise your rights in the context of one or several specific processing operations, please provide their description in your request.

The data subjects' rights (e.g. to information, access, rectification, erasure, restriction or objection to processing, communication of a personal data breach, or confidentiality of electronic communications) may be restricted under certain specific conditions by the joint controllers which have adopted a Restriction Decision in accordance with Article 25 of Regulation (EU) 2018/1725. In particular, for management/the selection and management of experts, the right to rectification is in principle limited to factual information. This is due to the fact that certain rectifications may lead to an alteration of the terms and conditions of the call and lead to further consequences according to applicable legislation (e.g. any correction may lead to exclusion as stated in the Financial Regulation).

Nevertheless, you should be informed that by virtue of Article 25 of Regulation No 2018/1725 and of the Internal Rules laid down under Commission Decision (EU) 2018/1962<sup>5</sup> and Commission Decision (EU) 2020/969<sup>6</sup>, one or several of these rights may be restricted for a temporary period of time *inter alia* on the grounds of prevention, investigation, detection and prosecution of criminal offences or on the grounds of monitoring, investigative, auditing or consultative activity of the Data Protection Officer of the European Commission. Any such restriction will be limited in time, proportionate and respect the essence of the above-mentioned rights. It will be lifted as soon as the circumstances justifying the restriction are no longer applicable. You will receive more detailed information when this period has passed.

As a general rule, you will be informed on the principal reasons for a restriction unless this information would cancel the effect of the restriction as such.

You have the right to make a complaint to the European Data Protection Supervisor concerning the scope of the restriction.

## **9. Contact information**

### **The (Joint) Controller**

If you would like to exercise your rights under Regulation (EU) 2018/1725, or if you have comments, questions or concerns, or if you would like to submit a complaint regarding the collection and use of your personal data, please contact the relevant (Joint) Controller, which is responsible for a specific EU programme, procurement or activity (see [list of joint controllers](#)).

### **The Data Protection Officer (DPO) of the (Joint) Controller**

You may contact the relevant Data Protection Officer (DPO) with regard to issues related to the processing of your personal data under Regulation (EU) 2018/1725. Contact data of the Data Protection Officer of the (Joint) Controller, which is responsible for a specific EU programme, procurement or activity (see [list of joint controllers](#)).

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<sup>5</sup> Commission Decision (EU) 2018/1962 of 11 December 2018 laying down internal rules concerning the processing of personal data by the European Anti-Fraud Office (OLAF) in relation to the provision of information to data subjects and the restriction of certain of their rights in accordance with Article 25 of Regulation (EU) 2018/1725 of the European Parliament and of the Council.

<sup>6</sup> Commission Decision (EU) 2020/969 of 3 July 2020 laying down implementing rules concerning the Data Protection Officer, restrictions of data subjects' rights and the application of Regulation (EU) 2018/1725 of the European Parliament and of the Council, and repealing Commission Decision 2008/597/EC.

## **The European Data Protection Supervisor (EDPS)**

You have the right to have recourse (i.e. you can lodge a [complaint](#)) to the European Data Protection Supervisor if you consider that your rights under Regulation (EU) 2018/1725 have been infringed as a result of the processing of your personal data by the Data Controller.

### **10. Where to find more detailed information?**

The Joint Controllers publish the records relevant for the processing operations carried out within the Funding and Tenders Portal in their registers of all processing operations on personal data.

For the European Commission, this specific processing operation has been included in the DPO's public register with the following Record reference: [DPR-EC-00915](#).