Horizon Europe: UCalgary Support Process and INOI

General Introduction and Support for Proposal Development

External Grants Team | RSO &
International Research Partnerships Team | UCalgary International

May 1, 2025

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The University of Calgary, located in the heart of Southern Alberta, both acknowledges and pays tribute to the traditional territories of the peoples of Treaty 7, which include the Blackfoot Confederacy (comprised of the Siksika, the Piikani, and the Kainai First Nations), the Tsuut'ina First Nation, and the Stoney Nakoda (including Chiniki, Bearspaw, and Goodstoney First Nations). The City of Calgary is also home to the Métis Nation of Alberta (Districts 5 and 6).

Housekeeping

- Questions
  - We will answer questions as we go in the chat and open up for verbal questions at the end
- Recording & Slides
  - Attendees who registered for the session will be sent the presentation following the event
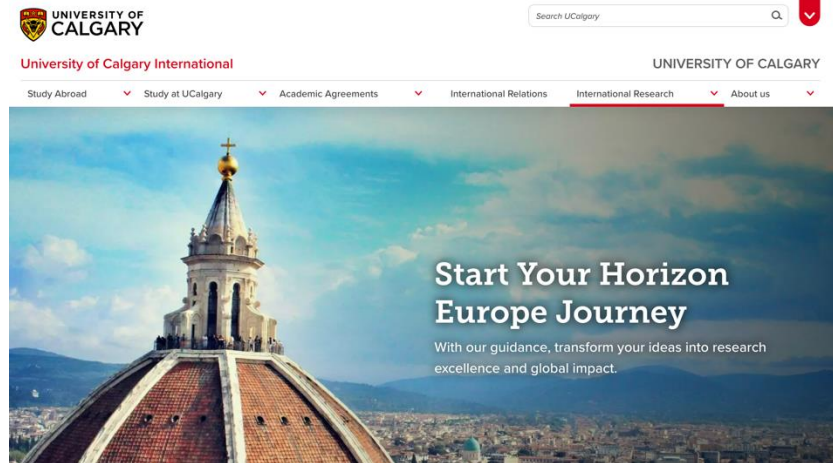- Please mute microphones

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Overview

1. What is Horizon Europe?
2. Understanding Pillar 2
   - Where to Find Funding Opportunities
   - Understanding the Work Programmes
3. iNOI & the Application Process
4. Guest Speaker (Dr. Barry Sanders)
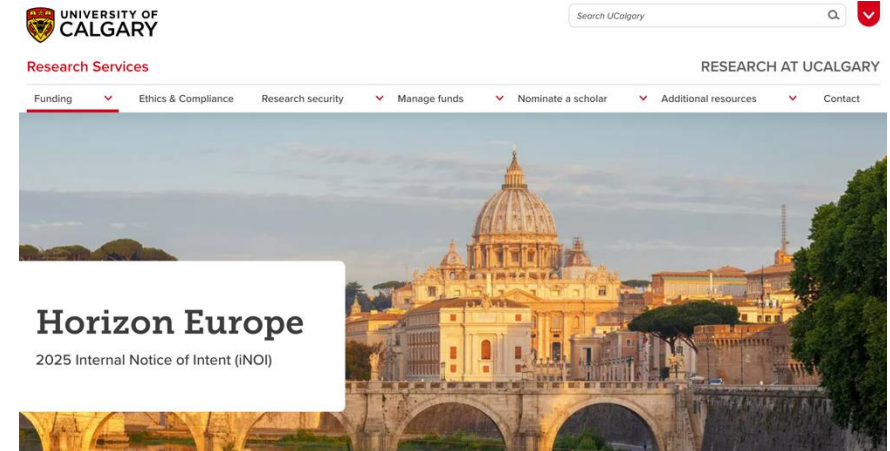5. Resources

Our Team

UCalgary International (UCI)

UCI – Horizon Europe

Sher Husain

- ➤ Partner Searches
- ➤ Funding opportunity search & contextual pairing
- ➤ Connecting on-campus teams and initiatives to your proposal

Research Services (RSO)

RSO – Horizon Europe

Marissa Montgomery-James

- ➤ Proposal development advice & support
- ➤ Connecting to in-house specialist teams
- ➤ Timelines & Submission (incl. RMS)

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Horizon Europe Overview

Excellent Science

- European Research Council
- Marie Sklodowska-Curie Awards
- Research Infrastructures

Global Challenges & European Industrial Competitiveness

- Health
- Culture, Creativity & inclusive Science
- Civil Security for Society
- Digital, Industry & Space
- Climate, Energy & Mobility
- Food, Bioeconomy, Natural Resources, Agriculture & Environment

Innovative Europe

- European Innovation Council
- European Innovation Ecosystems
- European Institute of Innovation and Technology

Pillar 1   **Pillar 2**   **Pillar 3**

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Horizon Europe - Pillar 2

Pillar 2 - Global Challenges

- ➢ Health
- ➢ Culture, Creativity & inclusive Science
- ➢ Civil Security for Society
- ➢ Digital, Industry & Space
- ➢ Climate, Energy & Mobility
- ➢ Food, Bioeconomy, Natural Resources, Agriculture & Environment

- Canada is newly associated to Pillar 2
- This Pillar is organized under 6 'Clusters'
  - Work Programmes
    - Destinations
    - Call topics
- Average Horizon Europe grant is **4.2M Euros**
- Types:
  - Research & Innovation Action
  - Innovation Action
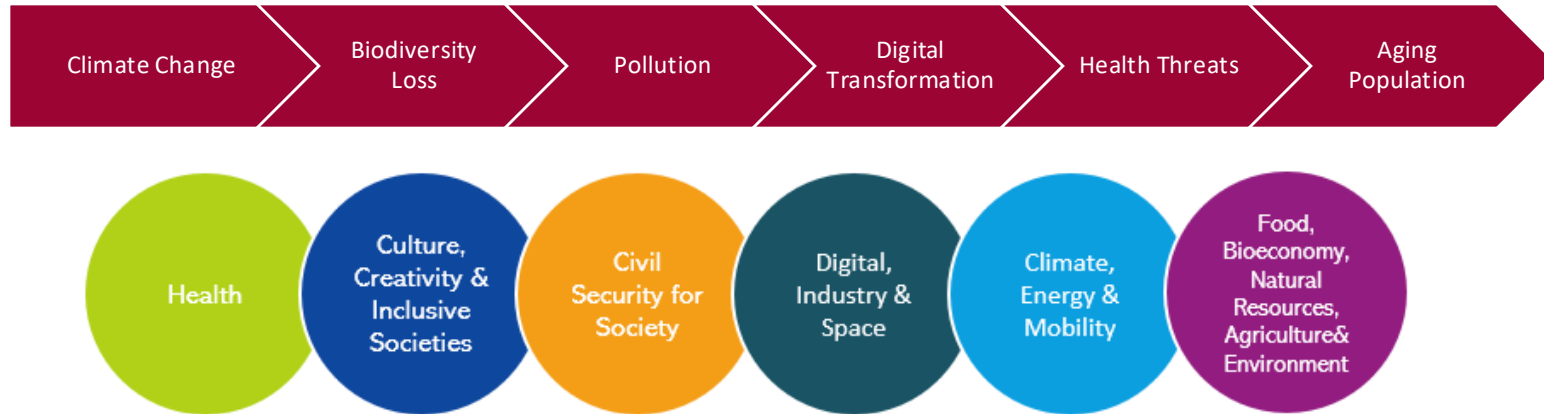 - Coordination & Support Action
  - COFUND

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Pillar 2: Where to Start? What is being funded?

2025-27 Strategic Plan

Climate Change	Biodiversity Loss	Pollution	Digital Transformation	Health Threats	Aging Population

Work Programmes (6 Clusters)

- Health
- Culture, Creativity & Inclusive Societies
- Civil Security for Society
- Digital, Industry & Space
- Climate, Energy & Mobility
- Food, Bioeconomy, Natural Resources, Agriculture & Environment

Destinations (5 – 7 per Cluster)

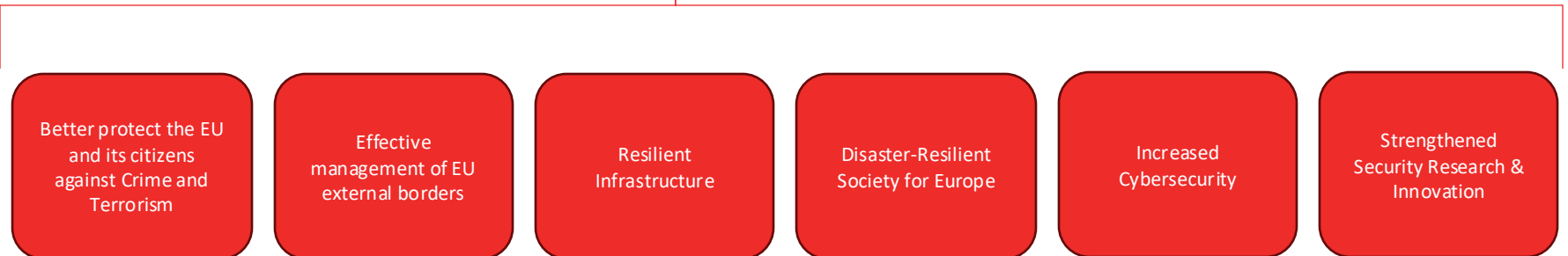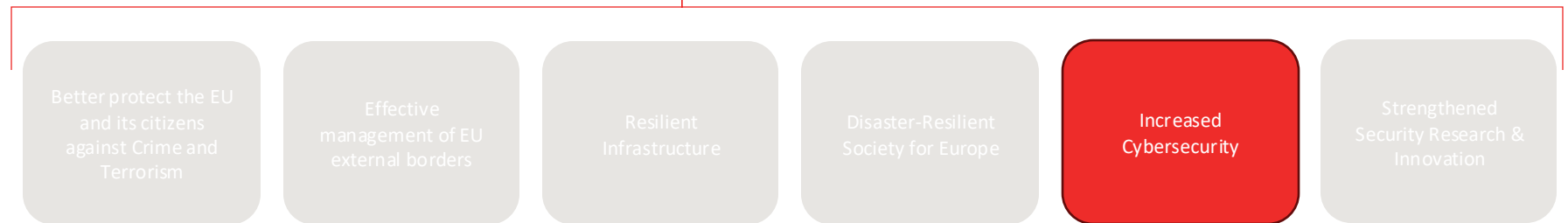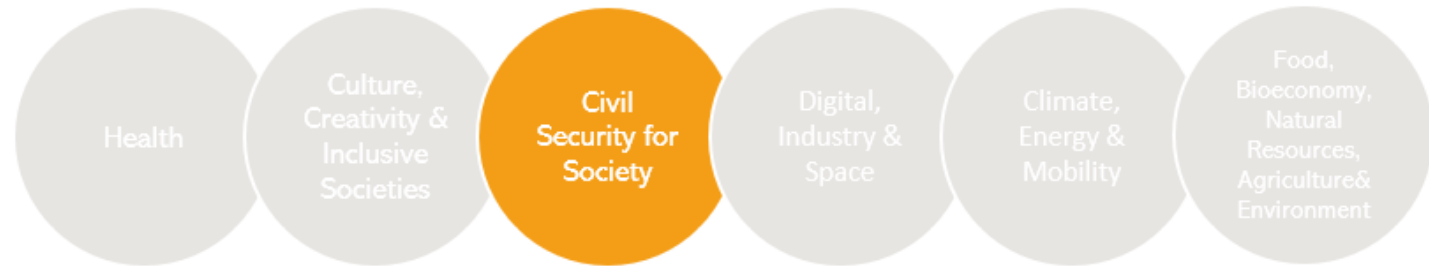Call Topics (200+)

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Pillar 2: Where to Start? What is being funded?

2025-27 Strategic Plan

Work Programmes (6 Clusters)

Destinations (5 – 7 per Cluster)

Call Topics (200+)

Climate Change	Biodiversity Loss	Pollution	Digital Transformation	Health Threats	Aging Population

- Health
- Culture, Creativity & Inclusive Societies
- **Civil Security for Society**
- Digital, Industry & Space
- Climate, Energy & Mobility
- Food, Bioeconomy, Natural Resources, Agriculture & Environment

Better protect the EU and its citizens against Crime and Terrorism	Effective management of EU external borders	Resilient Infrastructure	Disaster-Resilient Society for Europe	Increased Cybersecurity	Strengthened Security Research & Innovation

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Pillar 2: Where to Start? What is being funded?

2025-27 Strategic Plan

Climate Change → Biodiversity Loss → Pollution → Digital Transformation → Health Threats → Aging Population

Work Programmes (6 Clusters)

Health | Culture, Creativity & Inclusive Societies | Civil Security for Society | Digital, Industry & Space | Climate, Energy & Mobility | Food, Bioeconomy, Natural Resources, Agriculture& Environment

Destinations (5 – 7 per Cluster)

Better protect the EU and its citizens against Crime and Terrorism | Effective management of EU external borders | Resilient Infrastructure | Disaster-Resilient Society for Europe | Increased Cybersecurity | Strengthened Security Research & Innovation

Call Topics (200+)

HORIZON-CL3-2025-02-CS-01 — Generative AI for Cybersecurity Applications

HORIZON-CL3-2025-02-CS-02 — New advanced tools & Processes for Operational Cybersecurity

HORIZON-CL3-2025-02-CS-03 — Privacy Enhancing Technologies

HORIZON-CL3-2025-02-CS-04 — Security of Post-Quantum primitives

HORIZON-CL3-2025-02-CS-05 — Security of implementations of Post-Quantum Cryptography Algorithms

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Finding Pillar 2 Funding Opportunities

- **Work Programmes**
  - Not yet published for 2025 (but rolling publication expected imminently!)
  - Available from the EU Funding & Tenders Portal once official (Guidance & Documents tab)
  - RSO & UCI Website, Research Opportunities Database
  - Circulated to webinar attendees, once available

- **Funding & Tenders Portal**
  - Online Manual - Funding Tenders Opportunities

- **Looking for Partners? UCI can help!** (UCIResearch@ucalgary.ca)
  - CORDIS: CORDIS | European Commission
  - Information on past Projects and Results
  - Analytics and Visualization Tools for project and proposal data, related stats
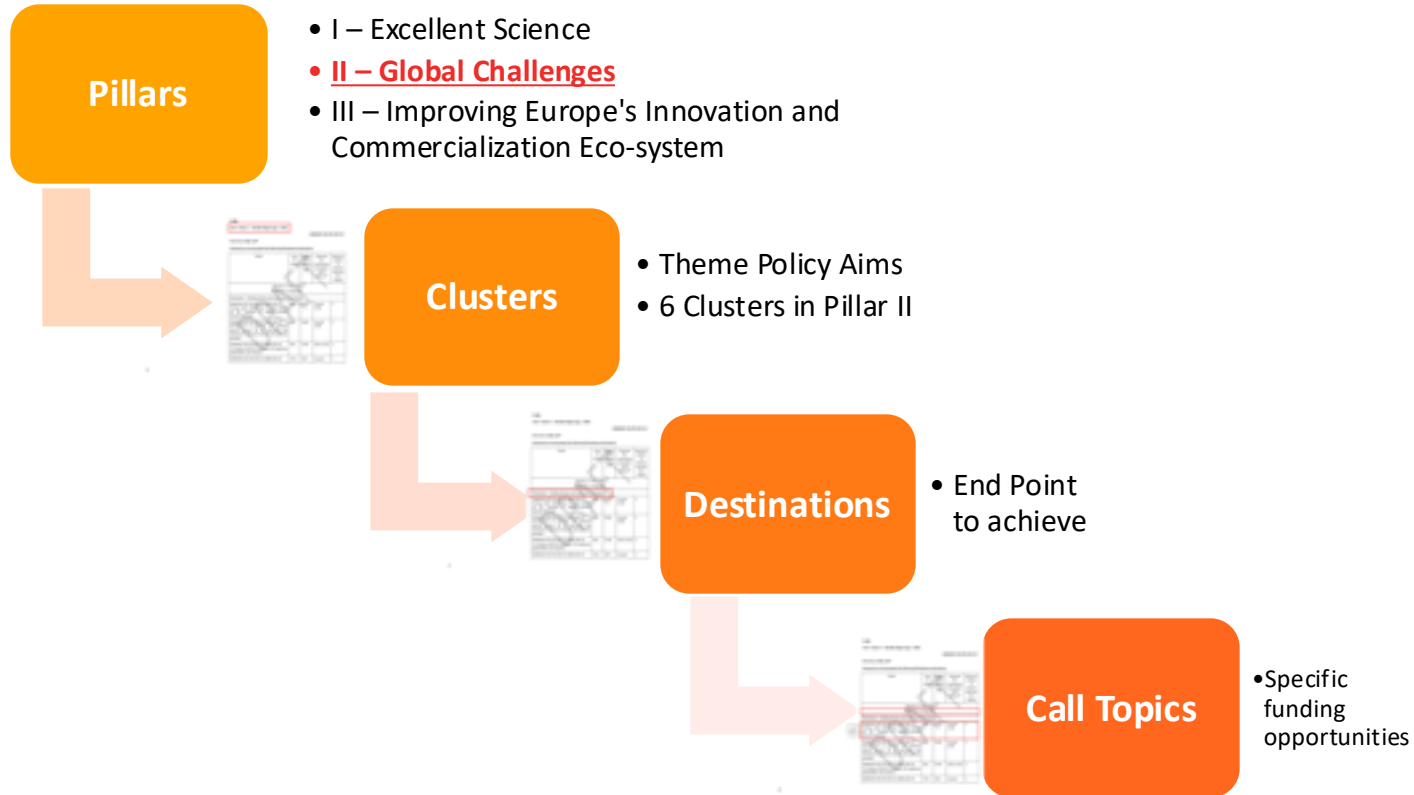
Key Resources - Work Programmes

- Work Programmes specify the call details, including:
  - ➢ Specific eligibility criteria
  - ➢ Consortium composition
  - ➢ Maximum anticipated funding amount
  - ➢ Number of grants anticipated per call
  - ➢ Applicable special procedures
    - • Blind Evaluations
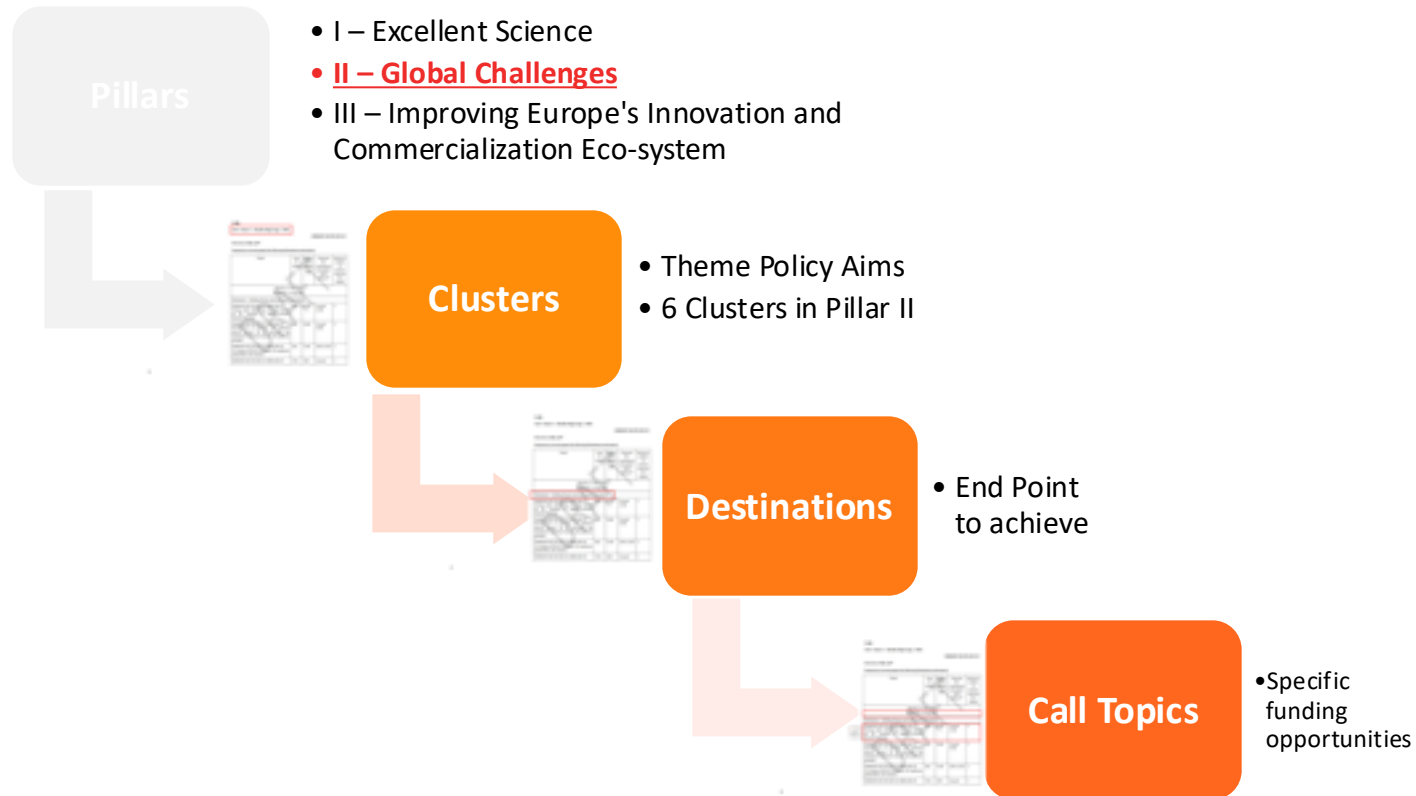   - • Single Stage vs. two-stage calls
    - • EU Strategic Asset calls

Proposals are invited against the following Destinations and topic(s):

Topics	Type of Action	Budgets (EUR million) 2025	Expected EU contribution per project (EUR million)[4]	Indicative number of projects expected to be funded
Opening: 15 May 2025 Deadline(s): 16 Sep 2025				
Destination Innovative Research on Democracy and Governance				
HORIZON-CL2-2025-01-DEMOCRACY-01: Advisory support and network to counter disinformation and foreign information manipulation and interference (FIMI)	CSA	3.50	3.00 to 3.50	1
HORIZON-CL2-2025-01-DEMOCRACY-02: Fostering the consolidation of European science diplomacy	CSA	3.00	2.50 to 3.00	1
HORIZON-CL2-2025-01-DEMOCRACY-03: Preparing the EU for future enlargement: challenges and opportunities	RIA	10.50	3.00 to 3.50	3
HORIZON-CL2-2025-01-DEMOCRACY-04: Open strategic autonomy, economic and research security in EU foreign policy	RIA	7.00	3.00 to 3.50	2

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How to Navigate HE Work Programmes

Pillars
- I – Excellent Science
- **II – Global Challenges**
- III – Improving Europe's Innovation and Commercialization Eco-system

Clusters
- Theme Policy Aims
- 6 Clusters in Pillar II

Destinations
- End Point to achieve

Call Topics
- Specific funding opportunities

Calls

Call - Cluster 1 - Health (Single stage - 2025)

HORIZON-HLTH-2025-01

Overview of this call[21]

Proposals are invited against the following Destinations and topic(s):

Topics	Type of Action	Budgets (EUR million) 2025	Expected EU contribution per project (EUR million)[22]	Indicative number of projects expected to be funded
Opening: 22 May 2025 Deadline(s): 18 Sep 2025				
Destination - Tackling diseases and reducing disease burden				
HORIZON-HLTH-2025-01-DISEASE-01: Testing safety and efficacy of phage therapy for the treatment of antibiotic-resistant bacterial infections	RIA	45.00	Around 15.00	3
HORIZON-HLTH-2025-01-DISEASE-03: Development of antibodies and antibody-derived proteins for the prevention and treatment of infectious diseases with epidemic potential	RIA	50.00	Around 10.00	5
HORIZON-HLTH-2025-01-DISEASE-04: Leveraging artificial intelligence for pandemic preparedness and response	RIA	35.00	6.00 to 8.00	5
HORIZON-HLTH-2025-01-DISEASE-05:	CSA	2.00	Around	1

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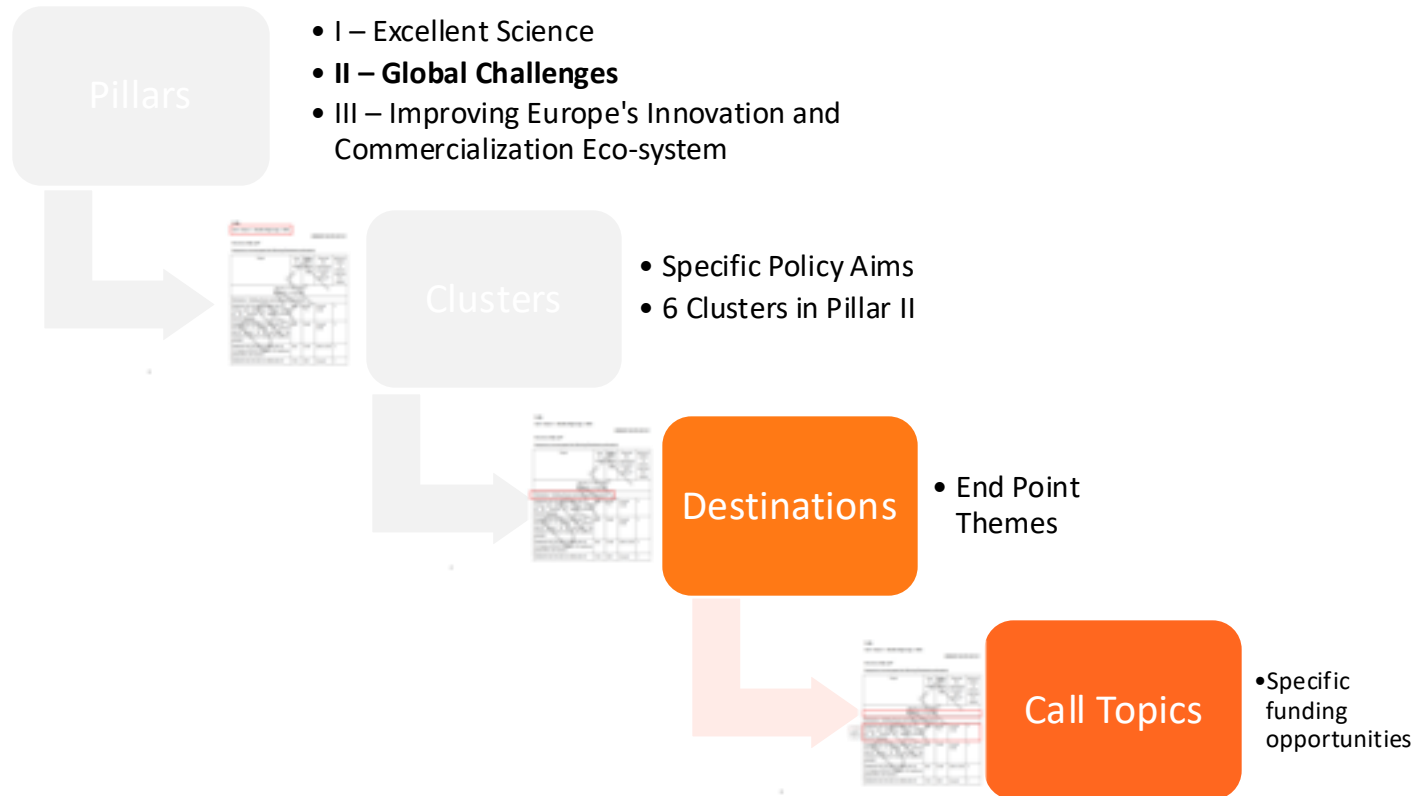
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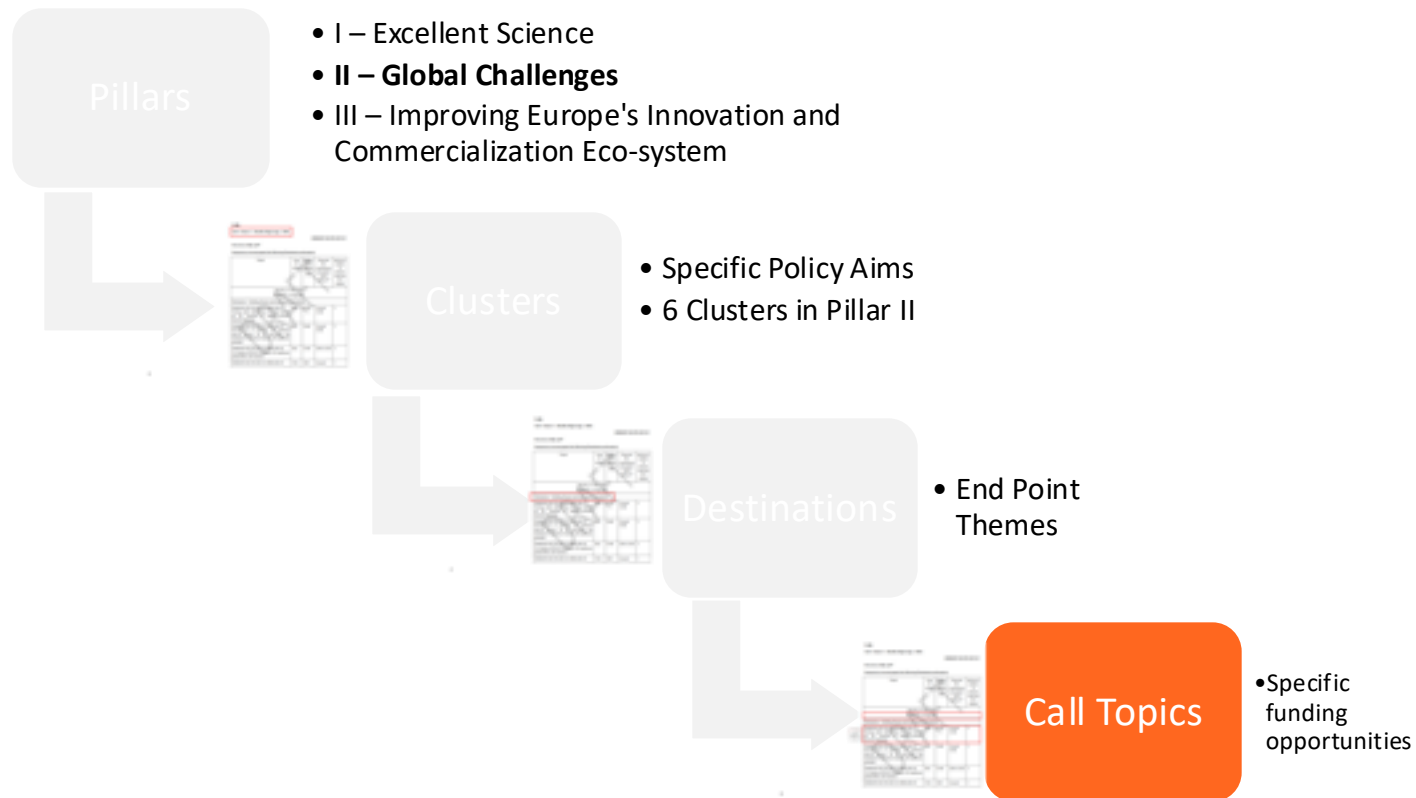**Call - Cluster 1 - Health (Single stage - 2025)**

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Expected Outcome: This topic aims at supporting activities that are enabling or contributing to one or several expected impacts of destination "Tackling diseases and reducing disease burden". To that end, proposals under this topic should aim to deliver results that are directed, tailored towards and contributing to most of the following expected outcomes:

- Researchers and developers make the best use of the state-of-the-art knowledge and resources for an effective development of new treatment options for patients suffering from difficult-to-treat infections.

- Healthcare professionals and people living with difficult-to-treat infections are ultimately provided with the availability of clinically useful phage therapies.

- Regulators are provided with quantifiable, verifiable and replicable data on safety and efficacy of phage therapy for human use and move faster towards market approval of novel phage-based therapies against antimicrobial resistant infections.

- Citizens are engaged and informed on innovative phage-based treatments as alternative therapeutic options complementary to antibiotics.

Scope: Antimicrobial resistance (AMR) has been identified by the United Nations (UN) General Assembly as a health Emergency in 2016. AMR is contributing to morbidity and mortality increasing the burden for society and healthcare costs. This is due to a worrying increase on the number of bacteria resistant to antibiotic treatment, causing chronic and often life-threatening infections such as wound and urinary tract infections. The World Health Organization (WHO) lists AMR among the top 10 threats for global health[79] and recognises that a lack of innovation is set to undermine antibiotic performance and health gains, with a major gap in the discovery of innovative antibacterial treatments[80].

Hence, there is an urgent need for the development of therapies to treat infections.

Bacteriophages (phages) represent a promising alternative or complement to antibiotics for the treatment of infections that do not respond to conventional treatment options. With the increase of AMR bacteria, both healthcare practitioners and innovators are expressing an increasing interest in the use of phages for the treatment of infections. As a result, the clinical

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Answering the Call: Building A Consortium

To be eligible for funding, applicants must be established in an eligible country:

✓Member States of the European Union, including their outermost regions;

✓Overseas Countries and Territories (OCTs) linked to the Member States

✓Eligible non-EU countries:

- *Countries associated to Horizon Europe (**Canada from July 1st, 2024**)*

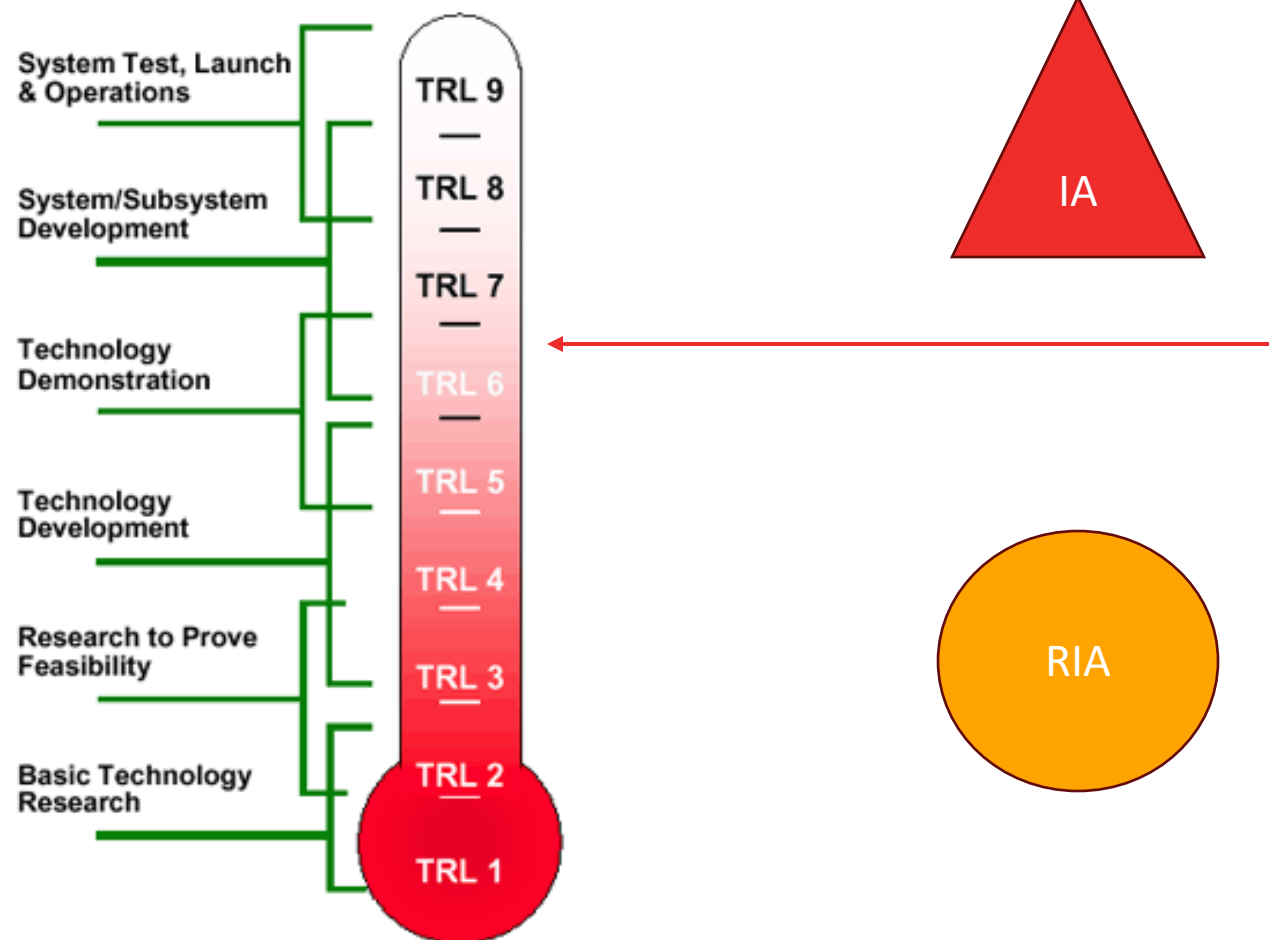- *Low- and middle-income countries*

Consortium Composition:

- *At least **ONE** independent legal entity established in an EU Member State* &

- **At least two other** independent legal entities, each established in **different Member States or Associated Countries**.

Member Eligibility

- Top down: a (targeted) solution contribution to the given problem(s)

- R & I activities

- **Eligible Consortia members can be:**

  - ☐ Companies

  - ☐ Knowledge institutes/centres

  - ☐ Universities

  - ☐ End-users

  - ☐ NGOs

  - ☐ Gov't Organizations

  - ☐ …

Answering the Call: Building A Consortium II

System Test, Launch & Operations — TRL 9

System/Subsystem Development — TRL 8, TRL 7

Technology Demonstration — TRL 6

Technology Development — TRL 5, TRL 4

Research to Prove Feasibility — TRL 3

Basic Technology Research — TRL 2, TRL 1

IA

RIA

Two main types of Actions in HE

Innovation Action → *closer to market activities*

Research & Innovation Action → *collaborative research projects tackling clearly defined challenges that can lead to the development of new knowledge or new technology*

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UCalgary Horizon Europe – Internal Notice of Intent (iNOI)

1. Ensure **early connection and coordination** of applicants and institutional offices

2. Organize **institutional support/resources** relevant to each applicant

3. UCI & RSO Staff **build** and **disseminate knowledge** via support process

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Internal Notice Of Intent (iNOI) Process

Mandatory iNOI Process for applicants

- 3 intake deadlines:
  - ❖ May 15, 2025
  - ❖ June 2, 2025
  - ❖ June 16, 2025
- Deadline is **12:00pm (noon)** for each intake deadline
- Submission to horizoneurope@ucalgary.ca

➤ Identify support needs for each applicant

➤ Support available for all applicants

- Identified and scaled based on the iNOI process
- Strength of the proposal
- Supports already available to applicant

iNOI Form – What to Expect

PART A. Project Details

1. Project Information	
Project Title:	
UCalgary PI:	
Department/Faculty:	
Email:	
UCalgary Co-Leader(s) (if applicable)	
Call Topic:	Click or tap here to enter text.
UCalgary Role (select one):	Click here to select
Name of Coordinating Institution:	

2. Project Scope		
Estimated total project cost (in Euros)		€
UCalgary portion of total project cost (in Euros)		€
Select the Technology Readiness Level of this proposal (TRL 1 -9)		Choose an item.
Does this proposal require additional support securing partnerships?		☐ Yes ☐ No
Will the project include industry partners?		☐ Yes ☐ No
Have you or one of your partner organizations previously applied to a Horizon Europe opportunity?		☐ Yes ☐ No
If yes, please specify which partner(s):		
Do the project activities require processing of personal data[1], or further processing of previously collected personal data (including use of pre-existing data sets or sources, merging existing data sets, etc.)?		☐ Yes ☐ No
Has a plan been developed with Research Computing Services to manage and store		

➢ 4 pages

➢ Key project details
- Call Topic
- UCalgary's Role
- Name of the Coordinator

➢ Partners List (key details)

➢ Project Description (1 page)

➢ Research Team (1/2 page)

➢ Alignment & Capacity (1/2 page)

➢ Readiness Checklist

iNOI Components

3. Partners List

Researcher Name	Organization Name	Country	Role (Lead, Co-Lead, Partner)	Description of Partner's Expertise	Status of Partner (Pending or Confirmed)
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.
					Choose an item.

PART B: iNOI details

When writing, consider how the proposed project meets the selected call topic's objectives.

4. Abstract / Project Description — 1 Page (11pt, single spaced) Max.

Provide key information about the proposed research activities and expected outcomes for a multidisciplinary audience.

- A **short overview** of the proposed **research activities** and the **objectives** of the proposed work.
- How does the project **fit** within the **international landscape**? How it is globally leading and go beyond state-of-the-art?
- Describe the **anticipated research outcomes**, and their **expected application(s)**.
- Identification of the **target groups** that would **benefit** from the project's results.
- Indication of the **scale** and **significance** of the project outputs and **impact** of the expected outcomes.

5. Research Team — 1/2-page (single spaced) Max.

Provide a description of the consortium and how it matches the project's objectives and bring together the disciplinary and interdisciplinary knowledge/trans-disciplinary nature of a consortium. Address the following:

- Team member **roles,** and why this is the **best possible team** composition for success.
- How the **diversity of the team** supports **excellent** and **innovative research** (including but not limited to differences in disciplines and approach to research, career stage, and life experience).
- Any **potential gaps** in the team, and **how these will be resolved** prior to submission of the application.
- The extent to which the team represents **world-leading expertise**.
- How the activities at the multiple sites be will **coordinated**; and
- Any **other collaborators** or collaborations important to understanding the **feasibility** of the research plan (e.g., access to critical infrastructure needed for project)
-

6. Alignment and UCalgary Capacity — 1/2 page (11pt, single spaced) Max

- How does the project align with the university's **institutional research priorities**?
- Describe the **resources available to you** that will support **UCalgary's successful contribution** to this proposal (i.e., Dedicated lab staff for project management, intention to hire a grant writer, faculty or department level resources committed to the proposal and project coordination).

For projects where the University of Calgary's is proposed to act as the **Coordinator**:

- What makes UCalgary the **best place to lead** this proposal?

UCI Services and Operation Parameters

- The **UCI Team** helps UCalgary researchers initiate, grow, and sustain collaborations in line with **primarily Horizon Europe Pillar 2 funding calls**

- There are instruments to <u>find partners</u>, but we can do that for you

- We work with researchers, faculty research facilitators and UCalgary transdisciplinary teams to:
  - **anticipate and understand** areas of research
  - **explore** topic-focused thematic alignment

RSO Supports & Process

Application Development Support Available

➢Eligibility & Admissibility considerations

➢Setting Application Milestones & Tasks

➢Budget Development Support

➢Coordination of partner documents

➢Connection to Specialized Units for Review and Feedback

Resources

➢Application Guides

➢Annotated Application Templates & Agreements

➢Questions about the Funding & Tenders Portal

Approvals & RMS records

➢Institutional Approval & Signature Collection

➢Timelines

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Next Steps...

✓ Find a call topic
  ➢ Horizon Europe work programmes - European Commission
  ➢ Consider also the Destination, Strategic Plan

✓ Confirm your partners
  ➢ Expertise & Role in proposal
  ➢ Leverage existing networks (internal & external)
  ➢ Contact UCI

✓ Identify gaps

✓ Download and complete the iNOI Form
  ➢ Horizon Europe | Research Services | Research at UCalgary | University of Calgary

Key Takeaways:

➢ **NOT** like Tri-Agency

➢ Top-Down
  o Outcomes
  o Excellence, Impact, Implementation

➢ INOI
  o Identify app development supports

➢ Must have a Call Topic before starting the iNOI

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Connect With Us!

horizoneurope@ucalgary.ca

Websites:

Horizon Europe | University of Calgary International | University of Calgary

Horizon Europe Research Services

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Horizon Europe Cluster

Understanding the Evaluation Process

Barry C Sanders

1st May 2025

My evaluation experience with the European Union

FP6 2002–2006	Reviewer FET Proactive Qubits Applications	European Commission Information Society & Media Directorate
7th Framework Programme FP7 2007–2013	ICT-2011-C_PartB_STREP_Short_03-08-2010 ICT-2011-C FP7 Call 9, Obj 9.9 Quantum ICT incl ERA-NET-Plus 2012 FET Flagship pilot project, Brussels 10 July 2012 FP7-ICT-2013-X	*Information and Communication Technologies*
H2020-FET 2014–2020	OPEN-2014 PROACT-2014 OPEN-2014-2015-RIA OPEN-2016-2017-RIA OPEN-1-2016-2017-RIA_11-05-2016 OPEN-1-2016-2017-RIA_17-01-2017 OPEN-2018-2019-2020-01 OPEN-01-2018-2019-2020_24-01-2019 OPEN-01-2018-2019-2020_03-06-2020	Open: leadership early exploration future tech Proactive: basis future & emerging tech
Horizon Europe 2021–2027	EIC-2021-PATHFINDEROPEN-01 EIC-2022-PATHFINDERCHALLENGES-01 EIC-2022-PATHFINDEROPEN-01 CL4-2023-DIGITAL-EMERGING-01-53 EIC-2023- PATHFINDEROPEN-01-01 EIC-2024-PATHFINDEROPEN-01	*Europe Innovation Council:* breakthrough tech and game-changing innovations *CL4 = Cluster 4*

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* I am interested in acting as (please select either one or both options)

- ☑ an evaluator
- ☑ a rapporteur

* I have experience as an evaluator of proposals with the European Commission

- ◉ Yes
- ○ No

* I have experience as a rapporteur

- ◉ yes
- ○ no

* The funding scheme for this topic is "lump sums". Do you have prior experience in dealing with lump sum approach in the Research and Innovation programmes?

- ◉ yes
- ○ no

* The funding scheme for this topic is "lump sums". Do you have experience in and ability to assess resources and costs at Work Package level required for a successful completion of a project?
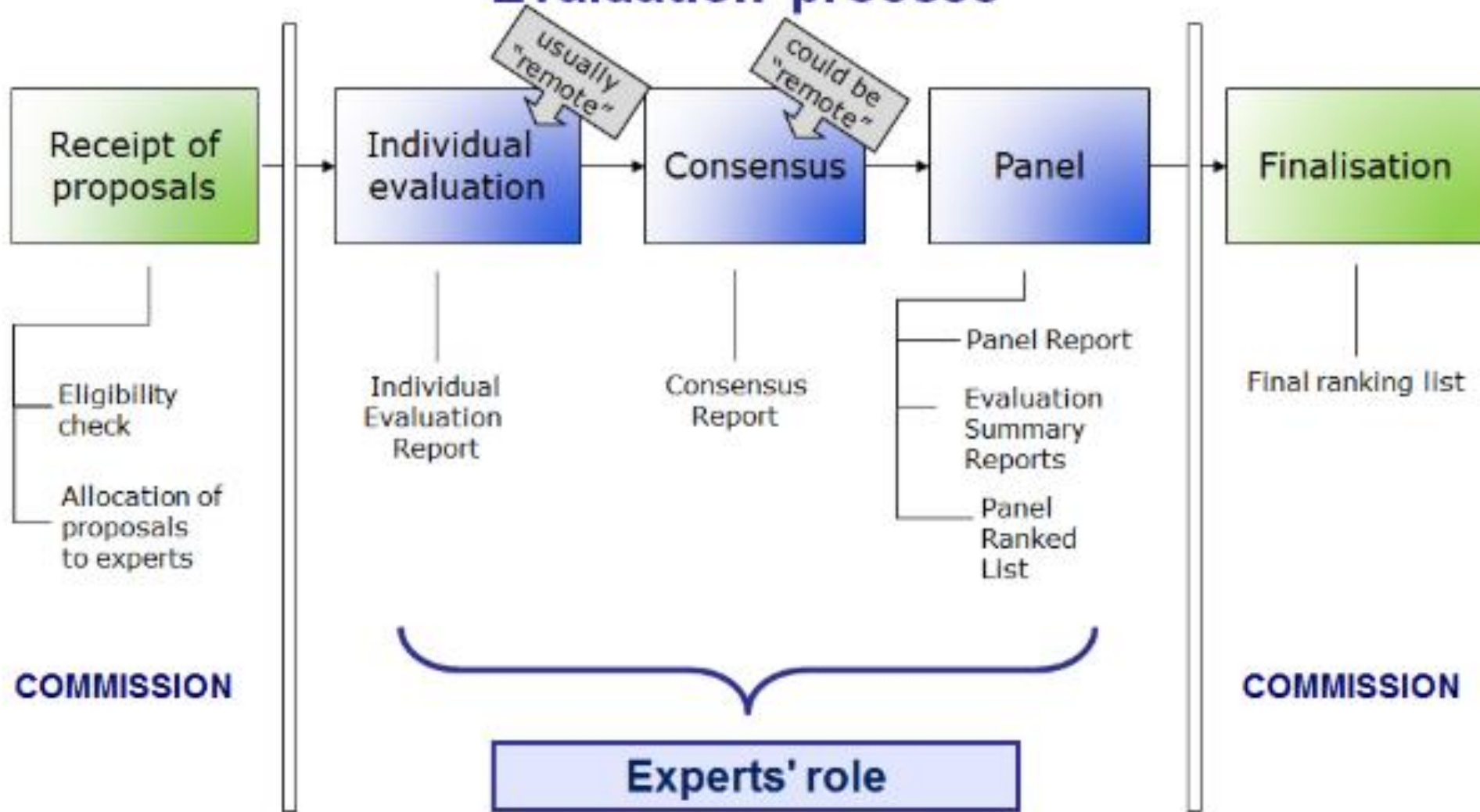
- ◉ Yes
- ○ No

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Dear expert,

With this survey, Unit B2 HaDEA (Health and Digital Executive Agency, established by the EC) wishes to enquire about your willingness and availability to assist us in our proposals evaluations for the recently launched call **HORIZON-CL4-2023-DIGITAL-EMERGING-01-53** in the area of **Versatile light sources and systems as tools for manufacturing and medical application (Photonics Partnership).**

The evaluation is expected to take place fully remotely in the 24 April to 09 June 2023 period. The planning of the evaluation is as follows:

- Closure of the Call: **29/03/2023**
- Remote reading and drafting of the individual evaluation reports : **24/04/2023 - 10/05/2023**
- Remote draft consensus report preparation: **11/05/2023 - 17/05/2023**
- Online consensus and panel meetings: **22/05/2023 - 09/06/2023**

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Horizon Europe Proposal Evaluation

EXCELLENCE

- ✓ Clarity and pertinence of the **project's objectives**, and the extent to which the proposed work is ambitious, and goes beyond the state-of-the-art.

- ✓ Soundness of the proposed **methodology**, including the underlying concepts, models, assumptions, inter-disciplinary approaches, appropriate consideration of the **gender dimension** in research and innovation content, and the quality of **open science practices** including sharing and management of research outputs and engagement of citizens, civil society and end users where appropriate.

IMPACT

- ✓ Credibility of the **pathways** to achieve the expected **outcomes and impacts** specified in the work programme, and the likely scale and significance of the contributions due to the project.

- ✓ Suitability and quality of the **measures to maximize expected outcomes and impacts**, as set out in the dissemination and exploitation plan, including communication activities.

QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

- ✓ Quality and effectiveness of the **work plan**, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall.

- ✓ Capacity and role of each **participant**, and extent to which the **consortium** as a whole brings together the necessary expertise.

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/experts/standard-briefing-slides-for-experts_he_en.pdf

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1. Evaluators are responsible for evaluating proposals submitted in response to a call for proposals. Evaluators may also act as a **rapporteur**, **chair**, or **vice-chair** at consensus discussions or meetings of panels of evaluators. **Rapporteurs** are responsible for drafting the **consensus report (CR)** of a consensus meeting.

2. Observers provide the EU services with independent advice on the conduct and fairness of all phases of the evaluation process, on how evaluators apply award criteria, and on how to improve the procedure. The observer may attend any meeting held during the proposal evaluation process and drafts a report on the evaluation session observed.

3. Monitors assist EU services in monitoring the implementation of projects that have received funding, taking into account work descriptions, reports and deliverables.

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- **Long-term Vision**:
  - **Key Question**: How convincing is the vision of a radically new technology?
  - **Expectation**: Proposals should articulate a clear and ambitious vision for a novel technology that can transform the economy and society.
- **Science-towards-Technology Breakthrough**:
  - **Key Question**: How concrete, novel, and ambitious is the proposed breakthrough?
  - **Expectation**: The proposed research should represent a significant advancement over current technologies, with the potential for a major scientific breakthrough.
- **Objectives**:
  - **Key Question**: How concrete and plausible are the objectives?
  - **Expectation**: Objectives should be clearly defined, achievable, and aligned with the overall vision. The research approach should be high-risk/high-gain.
- **Interdisciplinarity**:
  - **Key Question**: How relevant is the interdisciplinary approach?
  - **Expectation**: Proposals should demonstrate a well-integrated interdisciplinary approach, combining expertise from different fields to achieve the breakthrough.

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The underlying principles to bear in mind during evaluation are:

•**Excellence** - projects must demonstrate a high level of quality in relation to the topics and criteria set out in the calls

•**Transparency** - funding decisions must be based on clearly defined rules and procedures, and applicants should receive adequate feedback on the outcome of the evaluation

•**Fairness and impartiality** - all proposals must be treated equally and evaluated impartially on their merits, irrespective of their origin or the identity of the applicants

•**Confidentiality** - all proposals and related data, knowledge and documents must be treated in confidence

•**Speed and efficiency** - proposals should be evaluated and grants awarded and administered as swiftly as possible, without compromising quality or breaking the rules

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Evaluating quality of implementation: work plan

- Is the work plan of good quality and effective?

- Does it include quantified information so that progress can be monitored?

- Does it follow a logic structure (for example regarding the timing of work packages)?

- Are the resources allocated to the work packages in line with their objectives and deliverables?

- Are critical risks, relating to project implementation, identified and proper risk mitigation measures proposed?

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Evaluating quality of implementation: participants

- Consortium matches project's objectives & bring together necessary disciplinary and interdisciplinary knowledge?

- Includes expertise in open science practices, and gender aspects of research & innovation (R&I) as appropriate?

- SSH relevant: Includes expertise in social sciences and humanities?

- Access to needed critical infrastructure?

- Participants complement one another with valid roles?

- Industrial/commercial involvement to ensure exploitation?

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/experts/standard-briefing-slides-for-experts_he_en.pdf

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Typical problems with evaluation reports

- Comments starting with a (too long) summary of the proposal
- Particular part of sub-criterion not addressed at all
- Comments for one (sub-)criterion entered under another (sub-)criterion
- Score for a given criterion not aligned with the corresponding comments
- Comments clearly too short or too long
- Emotional or very personal statements, abusive language
- Too generic comments
- Too rigid and concrete comments – "there is no description of …", "there is complete lack of…"
- Comments with examples of research being conducted elsewhere (followed by citations)
- Suggestions for improvement of the proposal

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Quality control (QC) of IERs—how?

- Quality Controller (VC-QC) provides feedback to REA in case IER needs revision (re-open IER task)

- Each evaluator should revise a given IER according to REA request based on comments from VC-QCs

- React within 2 days to QC comments by modifying accordingly IER and re-submit

- To finalize the QC process, several iterations might be needed—please, be patient and collaborative

- Once the QC phase for a given IER is finalized, you will receive an email notification with confirmation

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As Cross Reader (CRr) you will be asked to read the proposals and the Individual Evaluation Reports each proposal will have received. You will then need to choose the individual assessment (prepared by another group of experts: the Individual Evaluators) which is closer to the opinion you have on the proposal and finally draft panel comments in preparation for the virtual panel meeting. On workload: you will be assigned ~10 proposals (of 20 pages) with their respective IERs (4 per proposal).

Additionally, you will also be requested to follow an online training course on the Evaluation process and criteria and to attend an online meeting.

2 ⚠ A **consensus group** is convened in order for all the experts who assessed the proposals in question to discuss the individual evaluation reports and agree on comments and scores.

The consensus group discussion is led by a moderator (normally an official from the concerned EU service), who seeks a consensus and ensures that proposals are evaluated in a fair manner and in line with the established criteria.

The consensus group discussion results in a **consensus report (CR)** including justifications of scores and dissenting views, if any. The moderator is responsible for ensuring that the consensus report reflects the consensus reached. The report is signed by the rapporteur and the experts evaluating the proposal discussed.

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Day 1:
Friday 28 June 2024

09.00	Opening and welcome message Antonio LOREDAN, Head of Sector, E1.1 – PATHFINDER Open
09.15	Remote Panel Review Week & Conflict of interest and Confidentiality Lucia FARINA, Call Coordinator
09.45	Coffee break and transition to the breakout sessions per cluster
10.00	Breakout sessions per cluster in 8 different Webex meeting rooms, test of the connections and tour de table
10.30	Panel discussions per sub-cluster in 8 different Webex meeting rooms
12.30	Lunch break
13.30	Panel discussions per sub-cluster in 8 different Webex meeting rooms
15.30	Coffee break
15.45	Panel discussions per sub-cluster in 8 different Webex meeting rooms
18.30	End of the first day of the remote panel week

Day 2, 3, 4 and 5:
Monday 1, Tuesday 2, Wednesday 3 and Thursday 4 July 2024

08.30	Tour de table and RED Category proposals final approval
10.15	Coffee break
10.30	Panel discussions per sub-cluster in 8 different Webex meeting rooms
12.30	Lunch break
13.30	Panel discussions per sub-cluster in 8 different Webex meeting rooms
15.30	Coffee break
15.45	Panel discussions per sub-cluster in 8 different Webex meeting rooms
18.30	End of the second, third, fourth or fifth day of the remote panel week

Day 6:
Friday 5 July 2024

09.00	Finalization CRs' feedback in plenary session
10.45	Coffee break
11.00	Final Panel Review: Untying and presentation of best proposals by rapporteurs
13.00	Lunch break
15:00	Presentation of Final Panel Report and ranking approval
18.00	End of the remote panel week

For GREEN or RED PROPOSALS¶

Panel comment structure

The comment that summarises the assessment by the evaluation committee must contain:

1. a general statement (the same for all proposals)
2. a comment related to the score
3. a comment related to the thresholds

⎫ Quality Controllers

4. a **specific** comment for the proposal*
   ➤ preferably referring to the Excellence criterion

* In case of major scores discrepancies and comments' contradictions (between REs), the CRs should also include a statement in the specific panel comment clarifying their position.

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General statement – by default entered in all panel comments:

"The Evaluation Summary Report comprises the final score, a comment that summarises the assessment by the evaluation committee as well as any additional comments, possibly including advice not to resubmit the proposal. The evaluation committee drew its conclusions on the basis of the individual evaluation score and the outcome of its consensus discussions.

While not necessarily subscribing to each and every opinion expressed in the individual evaluation reports, the evaluation committee finds that the comments from the evaluators provide a fair overall assessment, indicating both essential strengths, shortcomings and weaknesses identified in the proposal."

A specific comment for the proposal

a) preferably referring to the Excellence criterion and any special issues (a concise statement clearly expressing the panel opinion, of one paragraph overall; in general, max. one comment per criterion; in general, max. one comment per criterion)

b) if relevant, advising not to resubmit (see approach to be followed in the relevant EU Academy module)

Addressing the relevant Additional questions

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Thank you & Questions