

Proposal pre-screening guide

NCP GUIDE

ncpwideranet.eu



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AGENCY FOR MOBILITY AND EU PROGRAMMES



The National Centre for Research and Development



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Introduction

Proposal pre-screening guide (PPSG) aims at closing the innovation divide by helping NCPs in Widening Countries to rapidly acquire the know-how on NCP operations accumulated in other countries, through the knowledge and know-how presented in this guide.

NCP_WIDERA.NET project is providing a framework to all Widening participation and strengthening the ERA (WIDERA) NCPs on how to complete the pre-screening on various Widening instruments. This guide provides intelligence on complex WIDERA policy background, difference between different types of actions, explains what applicants should include in various sections in the CSA application and most importantly decodes the flagship funding calls (Teaming, Twinning, Excellence Hubs, Hop-On, EEI, ERA Talents). The information provided in this guide can be used to professionalize NCP provided service in each Widening country.

Moreover, the PPSG provides NCPs with checklists to be used for their pre-screening checks, additional information on decoded funding calls and links to the most important policy documents in the Annexes.

The nature of the pre-screening check might vary depending on working practices of different NCP host organisations. The provided examples of Pre-screening checklist (ANNEX I and II) enables WIDERA NCPS to complete a check-list and assess if a proposal is eligible and meets the work programme and call specific requirements. The Pre-screening checklist is a building block to provide additional feedback to the applicants if/when required depending on the call topic using information in this Guide (decoded call topics, guide on how to use Part A of the Funding and Tenders portal, what to include in CSA template).

This comprehensive PPSG framework is for NCPs in Widening countries to be used as a training material to develop the competences by building on official resources produced by the European Commission.

Policy background

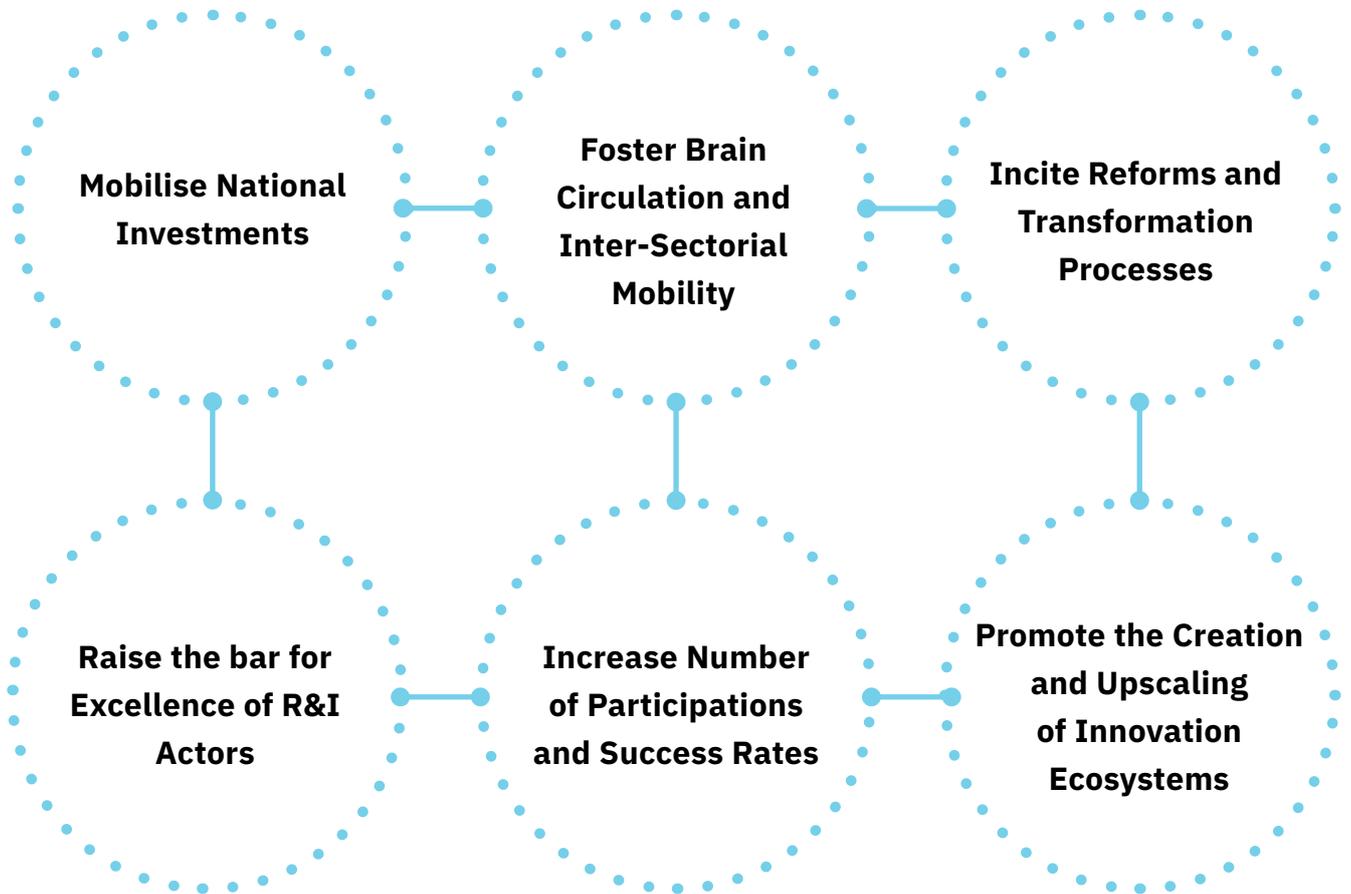
– Widening and ERA

We have seen reports that the European Union (EU) has been facing a situation where disparities in research excellence and innovation performance at a national and regional level are significant. With a view to addressing these disparities, Commissioner Busquin launched the [European Research Area \(ERA\)](#) in 2000, which set out to better organise research in Europe and to tackle the fragmentation of national research systems and the lack of policy coordination between Member States and the EU.

It is important to note, that building on almost 20 years of work, the European Council relaunched the new ERA in 2020 with updated priorities, governance and monitoring at national and EU level. In November 2021, the Council of the EU adopted conclusion on the governance of the ERA and the [Pact for Research and Innovation in Europe](#). The Pact's main objective is to reinforce the commitment to shared policies and principles such as freedom of scientific research and free circulation of researchers and knowledge. It outlines 16 shared priority areas for joint action ranging from fostering open science for faster sharing of knowledge and data to reinforcing the scientific leadership and excellence of the EU. The Pact sets the direction for national and

EU research and innovation policy for the next decade. [The ERA Policy Agenda for 2022 – 2024](#) contributes to the priority areas defined in the Pact. It establishes a governance framework for the ERA and 20 priorities among which are the promotion of attractive and sustainable research careers, bringing science closer to citizens and improving EU-wide access to excellence.

The Widening participation and strengthening the ERA part of Horizon Europe work programme (WIDERA) aims at connecting research and innovation in Widening countries to a broader European network of excellence, with the goal of strengthening the Widening countries and allowing the EU as a whole to advance. The Widening actions play a central role in strengthening the European Research Area. WIDERA programme has six main objectives (graph 1), which are going to be achieved through various funding instruments (Teaming, Twinning, Excellence Hubs, ERA Talents, etc.) which aim to contribute to closing the R&I gap at the different sectors (picture below).





Decoding the work programme

In order to provide the best possible pre-screening service to the clients. NCPs must fully grasp how to read, interpret and extract information from the work programme (WP).

WIDERA work programme (WP) not only lists the financial instruments and call topics, but also provides the reference to relevant policy documents, explains synergies between the instruments and states what objectives and impact projects should achieve. WP's Introduction section has two parts: Part I: Widening Participation and Spreading Excellence – Overall strategic approach and Part II: Strengthening the European Research Area – Overall strategic approach.

NCPs should read through the introduction carefully and pick out the most relevant policy information, when the topic pre-proposal checks are being conducted.

Moreover, WP's introduction is not provided on the Funding and Tenders (F&T) portal. This means that without NCPs support and insights applicants might miss some important information or policy relevance if not familiarized and understood.

WIDERA WP has three destinations. Each of those destinations contribute to achieve the programme's aims, which are clearly explained in the Introduction section of the document. Each destination has its own financial instruments (call topics), that enable the achievement of the goals and impacts.

Again, NCPs, before providing the feedback on pre-proposal check should always re-read the destination description to make sure that no important information policy relevance, additional impact or outcomes have been missed.

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Each call topic has its own conditions, budget, purpose (title of the call), expected outcomes (short term benefits) and scope (objectives).

Expected impact

Proposals for topics under this Destination should set out a credible pathway to contributing to the following expected impacts:

- Increased science and innovation capacities for all actors in the R&I system in widening countries
- Structural changes leading to a modernised and more competitive R&I systems in eligible countries
- Reformed R&I systems and institutions leading also to increased attractiveness and retention of research talents
- Mobilisation of national and European resources for strategic investments
- Higher participation success in Horizon Europe and more consortium leadership roles
- Stronger linkages between academia and business and improved career permeability
- Strengthened role of the Higher Education sector in research and innovation

Introduction lists general expected impacts and general policies for the WIDERA. This information will not be available on the F&T portal with the call information, so it is a key to read the introduction and understand fully what will be required. For example, introduction mentions and lists SDGs, which are not mentioned in destination description and call topics. The European Green Deal and Digital Transition will not be mentioned either, unless call specifically targets that topic. These policies are important and should be known by the NCPs.

If an applicant is submitting a proposal under any of the calls in Destination 1 (for example), it is imperative to check how the proposal is contributing to destination's expected impacts, synergies and specific policies. Destination's expected impacts are listed in the description of each destination.

Each destination (this is example from Destination 1) will mention specific policies and list expected impacts, which have to be contributed to in the long term by the projects. NCPs conducting pre-proposal check must be aware to double check that the destination specific impacts are mentioned in the project proposal.

Once NCPs fully understand the complexity of the WP, they will be better equipped to complete the pre-proposal checks as they will be fully aware of the relevant policies and impacts required for the specific call topic.

HORIZON-WIDERA-2021-ACCESS-03-01: Twinning

Specific conditions	
<i>Expected EU contribution per project</i>	The Commission estimates that an EU contribution of between EUR 0.80 and 1.50 million would allow these outcomes to be addressed appropriately. Nonetheless, this does not preclude submission and selection of a proposal requesting different amounts.
<i>Indicative budget</i>	The total indicative budget for the topic is EUR 149.00 million.
<i>Type of Action</i>	Coordination and Support Actions
<i>Eligibility conditions</i>	The conditions are described in General Annex B. The following exceptions apply: In order to achieve the expected outcomes, participation as coordinators to the call is limited to legal entities established in Widening countries, as defined in the Horizon Europe regulation. Furthermore, at least 70% of the budget for research activities must be allocated to the coordinator from a widening country. Proposals also submitted under call HORIZON-WIDERA-ACCESS-02 Twinning Western Balkans are not eligible.
<i>Procedure</i>	The procedure is described in General Annex F. The following exceptions apply: The following rules for dealing with ex-aequo applications apply: in the first place, ex aequo proposals will be prioritised according to geographical diversity criteria, as indicated in Point 4) of General Annexes Part F (Procedure/Evaluation procedure and ranking). The method described in 1), 2), 3) and 5) will then be applied to the remaining equally ranking proposals in the group. This rule establishing the priority order serves to better spread the impact of the action and to strengthen the efficiency of the 'Widening participation and spreading excellence' programme.

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Expected Outcome: To prevent further disparities, maximize investment in R&D and enhance economic growth, Horizon Europe is taking relevant actions under Widening participation and spreading excellence objective. Twinning actions are one of the main instruments of this objective.

Twining aims to enhance networking activities between the research institutions of the Widening countries and top-class leading counterparts at EU level by linking it with at least two research institutions from two different Member States or Associated Countries. Therefore, building on the huge potential of networking for excellence through knowledge transfer and exchange of best practice between research institutions and partners. Twinning actions intend to help raise the research profile of the institution from the Widening country as well as the research profile of its staff including a special focus on strengthening the research management and administrative skills of the coordination institution from the Widening country.

Project results are expected to contribute to all of the following expected outcomes:

- Improved excellence capacity and resources in Widening countries enabling to close the still apparent research and innovation gap within Europe.
- Enhanced strategic networking activities between the research institutions of the Widening countries and at least two internationally-leading counterparts at EU level.
- Raised reputation, research profile and attractiveness of the coordinating institution from the Widening country and the research profile of its staff.
- Strengthened research management capacities and administrative skills of the staff working in institutions from the Widening country.
- Improved creativity supported by development of new approaches in R&I collaboration, increased mobility (inwards and outwards) of qualified scientists.

Twining proposals should have to clearly outline the scientific strategy for stepping stimulating scientific excellence and innovation capacity in a defined area of research as the scientific quality of the partners involved in the twinning exercise. This scientific strategy should include arrangements for formulating new (or ongoing) joint project(s) in the scientific area of choice and describe how Twining will take this to a new stage, by enlarging its scope and/or the research partnership. If relevant, any with sustainable development objectives are to be outlined.

The strategy should include a comprehensive set of activities to be supported. These should include at least a number of the following: short-term staff exchanges; expert visits and short on-site or virtual training; workshops; conference attendance; organisation of joint research school type activities; dissemination and outreach activities. As far as appropriate activities should take into account the gender equality plans of the participants.

The call topics are financial instruments that contribute to achieving destinations' and WPs' goals and impacts. This information is provided on the F&T portal, however, NCP should not assume that the client has read the information and is aware of specific procedures or eligibility conditions.

The call topic expected outcomes (short term benefits) define what the project should contribute to by the end of the project (in this case, by the end of the 3 years as this is an example from the Twinning call).

The scope provides information on what type of challenges the project should be addressing, what should be the project's purpose and also identifies other aspects that must be considered when writing the proposal:

- Gender dimension
- SSH integration
- Focus on research management, etc.

The scope as well provides applicants with expected project objectives that need to be included in a proposal.

General information on pre-screening

Pre-proposal check refers to the thorough checking of proposal outlines by NCPs. Pre-proposal check has couple of steps and could be conducted at different time in the proposal preparation stage:

- **Phase 1.** Ideally, 6 months before the deadline applicants would contact NCPs to assess their project idea, consortium composition, discuss call topic (applying the knowledge from decoded work programme) and eligibility requirements.
 - **Phase 2.** 2 months before the deadline applicants contact NCP with a request to check their proposal. NCPs complete the task using one of the check-lists .
 - **Phase 3.** Even though NCPs are not evaluators, in some cases, NCPs will read full proposals and provide the feedback to applicants on non-scientific parts, based on their knowledge of the call topic. This would be the final and most comprehensive phase of the pre-screening.
- However, this does not mean that applicants should go through each phase as it will very much depend on the environment of each Widening country.

Coordination and support action (CSA) and Research and innovation action (RIA)

NCPs will often need to clarify to the applicants that most of (with the exception of Hop-on Facility) Widening call topics support activities under coordination and support action (CSA). However, in Widening, most of the CSA projects can have a component of R&I activities, although the percentage (%) might vary.

CSA	RIA
Activities that contribute to the objectives of Horizon Europe. This excludes R&I activities, except those carried out under the ‘Widening participation and spreading excellence’ component of the programme (part of ‘Widening participation and strengthening the European Research Area’). Also eligible are bottom-up coordination actions which promote cooperation between legal entities from Member States and Associated Countries to strengthen the European Research Area, and which receive no EU co-funding for research activities (HE WP 2021-2022, 13. General Annexes, p. 9).	Activities that aim primarily to establish new knowledge or to explore the feasibility of a new or improved technology, product, process, service or solution. This may include basic and applied research, technology development and integration, testing, demonstration and validation of a small-scale prototype in a laboratory or simulated environment (HE WP 2021-2022, 13. General Annexes, p. 9).

<p>Accompanying measures or complementary activities, such as standardisation, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogue, mutual learning exercises, studies and networking and coordination between programmes in different countries (no research funding per se) (HORIZON EUROPE GLOSSARY: A SIMPLE GUIDANCE THROUGH HEU TERMINOLOGY, p. 31).</p>	<p>Most common action in HE.</p>
<p>Funding rate for CSA in HE: 100%.</p>	<p>Funding rate for RIA in HE: 100%</p>
<p>The limit for a full application: 30 pages</p>	<p>The limit for a full application: 45 pages</p>
<p>In general, research costs are available for CSA type of actions in HE eligible under the „Widening participation and spreading excellence“ component of the programme, few examples below:</p> <p>TEAMING project proposal containing a minor research component can be accepted without exceeding 10% of the total Horizon Europe grant.</p> <p>TWINNING project proposal may contain a research component in a form of an exploratory research project not exceeding 30% of the total Horizon Europe grant budget. This will open opportunities for integrating smaller research projects and by this strengthening the commitment and the engagement of the twinning partners</p> <p>EXCELLENCE HUBS: The 25-30 % research component should be developed by joint pilot research projects in a domain covered by the joint strategy. For example, in the R&I projects lab prototypes might be developed leading to the design of pilot plants or demonstrators (see above). However, the realization of such pilots and demonstrators must be financed by other sources in particular programmes co-financed by the ERDF. The approach how to access such co-funding at a later stage should be sketched out in the proposal. Notably for the case of ERDF the proposal should demonstrate the alignment with the pertinent regional smart specialization.</p> <p>ERA CHAIR projects can have up to 10% of their budget allocated to research and innovation activities.</p>	<p>Example of a RIA type of action in „Widening participation and spreading excellence“ component of the programme:</p> <p>HOP-ON FACILITY: Legal entities established in Widening countries may join already selected actions, subject to the agreement of the respective consortium and provided that legal entities from such countries are not yet participating in it. The proposal must be submitted by the coordinator of a consortium funded under Pillar 2 or an EIC Pathfinder call of Horizon Europe with a valid grant agreement that does not have any participant from a country eligible to host the coordinator under the Widening component (Widening country). The proposal must include the accession of one additional partner from a widening country)</p>

Pre-screening: Systems and Budget

Decoding Part A

Pre-screening of the proposals should include both the application form (Part A) and project proposal (Part B), hence it is important for the NCPs to understand the process of how to fill in the Part A online on the Funding and Tenders (F&T) portal.

This section will not provide guidance on how to use the F&T portal or even how to register on it as this is clearly explained in EC video presentation [The Funding & Tenders Portal for beginners](#), a webinar organized by the EC Funding and Tenders

Portal team, Common Implementation Centre (from 10min onwards a very clear explanation how to use the portal, and from 28 min onwards explains how to register on the portal). In addition, the EC has provided a separate how to log in to the portal - [EU_Login_Tutorial](#) (pdf).

The following video <https://youtu.be/RFRHWDf2IWk> explains in detail how to use PART A on F&T portal. The power point presentation of the video can be found on WIDERA project website.

Horizon Europe lump sum funding model

Pre-screening of the proposals should include both the application form (Part A) and project proposal (Part B), hence it is important for the NCPs to understand the process of how to fill in the Part A online on the Funding and Tenders (F&T) portal.

This section will not provide guidance on how to use the F&T portal or even how to register on it as this is clearly explained in EC video presentation [The Funding & Tenders Portal for beginners](#), a webinar organized by the EC Funding and Tenders Portal team, Common Implementation Centre



WHY do we use lump sum funding?

- This model aims to significantly reduce the administrative burden of project implementation, simplify reporting, and relieve project coordinators from the obligation to submit actual cost reports and financial ex-post audits.
- Less focus on financial management, and more focus on the scientific-technical content of projects.

In WHICH calls will the lump sum be used?

- Twinning, EEI, ERA Talents, ERA Chairs.

WHAT are lump sum options?

There can be two lump sum types*:

- The call for proposals defines a fixed lump sum. The budget requested in your proposal must be equal to this fixed lump sum. Your proposal must describe the resources mobilized for this amount (Option 1).

- You define the lump sum in your proposal. In setting the lump sum, you are free to define the amount necessary to carry out your project. The lump sum chosen must be justified by the resources mobilized (Option 2).

*The type of lump sum is specified in the text of the topic which you are applying.

WHAT do you need to know in order to prepare a lump sum proposal?

- Use the standard Horizon Europe proposal template + to define and justify the lump sum. You need to provide detailed breakdown of cost estimations (MS Excel template). In the part A of the application (online forms), you have to fill in the 'Budget for the proposal' table, entering the requested grant amount for each participant.
- It is important to clearly and constructively allocate activities to WP, as the payment is linked to fully completed WP activities.

The necessary amount of WP can be planned according to the principles:

- Work packages with a long duration may be split along the reporting periods (e.g., Management, Dissemination and Exploitation, etc.). In this way, the relevant activities can be paid at the end of the reporting period
- You can plan as many WP as needed, but no more than what is manageable
- A single activity is not a WP
- A single task is not a WP
- A % of progress is not a WP (e.g. 50 % of the tests)
- A lapse of time is generally not a WP (e.g. activities of year 1).
- Based on the planned cost estimates, lump sum parts are automatically generated for each WP and each partner.



- Once the lump sum is fixed in the grant agreement, the costs actually incurred are not relevant. The detailed cost estimations from your proposal do not become part of the grant agreement.

WHAT is important when thinking about a consortium?

- Although the actual costs incurred are not important, it is important who performs the project activities - it is mandatory to determine exactly which project participant performs specific project activities, as this is one of the main things for project control.

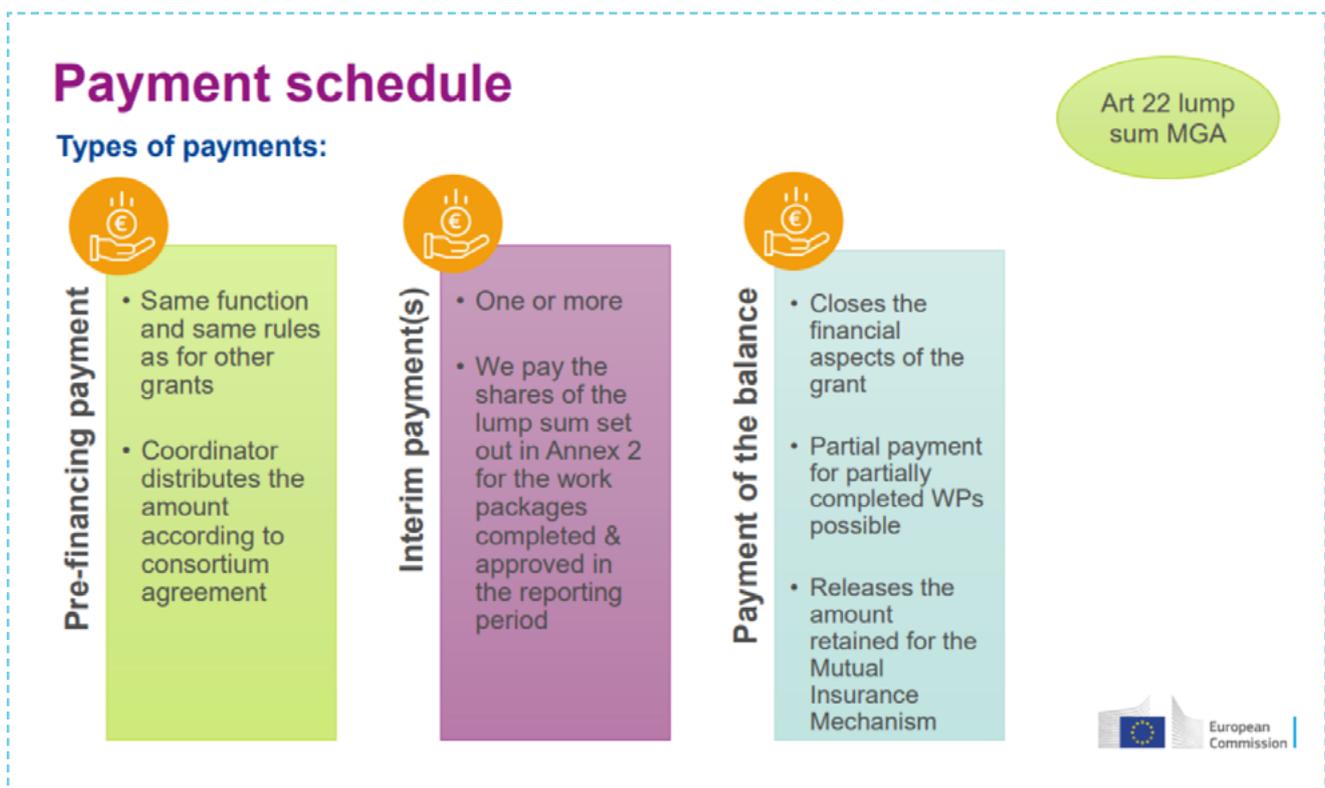
The partner organizations and their activities are specified in the grant agreement:

- Beneficiaries
- Affiliated entities
- Associated partners

- Subcontractors (* Subcontracted activities must be in the grant agreement, but the Subcontractor may or may not be named.

HOW will lump sum application evaluation take place?

- Your proposal will be evaluated by independent experts against the standard evaluation criteria: excellence, impact and implementation.
- The cost estimations will be assessed against the proposed activities under the implementation criterion. Experts will ensure that the estimates are reasonable and non-excessive.
- If the experts find overestimated costs, this is recorded in the Evaluation Summary Report.
- This will be reflected in a modified lump sum amount in the grant agreement.



HOW will the reporting and payments take place?

- The lump sum model uses a payment scheme: pre-financing + interim payments for fully completed work packages.
- At the end of the reporting period, declare which work packages have been completed over the period.
- Following the assessment of the project officer, the lump sum shares corresponding to approved work packages are paid.
- Payment does not depend on a successful outcome, but on the completion of activities.
- If a work package cannot be completed for scientific-technical reasons, you should

introduce an amendment to make it feasible, including the possibility to extend the project duration.

- If a work package is incomplete at the end of the project, the lump sum is paid partially in line with the degree of completion. This amount is determined after a contradictory procedure.
- Reporting is based on completion of WP (technical reports).

No financial checks, reviews and audits by the European Commission when reporting for completed WPs, only the consolidated consortium financial statement for completed WPs needs to be completed (Art.21.2 MGA).

Keeping records

Art 20 lump sum MGA

You need (e.g.)	You don't need
<input type="checkbox"/> Technical documents	<input type="checkbox"/> Time-sheets
<input type="checkbox"/> Publications, prototypes, deliverables	<input type="checkbox"/> Pay-slips or contracts
<input type="checkbox"/> Documentation required by good research practices such as lab books	<input type="checkbox"/> Depreciation policy
<input type="checkbox"/> ...any document proving that the work was done as detailed in Annex 1	<input type="checkbox"/> Invoices
<input type="checkbox"/> ...actual costs	

Same as for all Horizon Europe grants



Check, reviews and audits will take place in order to find out, whether:

- The action was properly implemented (e.g. technical review)
- There is a compliance with the other non-financial obligations of the grant (IPR obligations, obligations related to third parties other obligations (e.g. ethics, visibility of EU funding, etc.))

! You can use the budget as you see fit as long as the project is implemented in accordance with the grant agreement. The actual distribution of the lump sum is invisible to EC.

- Funds do not need to be returned if money savings occur in the project.
- There is no longer a requirement to use time-sheets, a simpler alternative is offered – a monthly time declaration.

Art 5.5
lump sum
MGA

	WP1	WP2	WP3	WP4	WP5	WP6	WP7	WP8	Total
Beneficiary A	250.000			50.000	300.000	250.000		300.000	1.150.000
Beneficiary B		250.000	350.000	50.000			100.000	150.000	900.000
Beneficiary C	100.000	100.000		50.000		280.000			530.000
Beneficiary D		120.000		50.000			100.000	150.000	420.000
Total	350.000	470.000	350.000	200.000	300.000	530.000	200.000	600.000	3.000.000

WHAT if the project needs changes?

- Changes in the project work plan are allowed – the same opportunities are provided to request changes, amendments and extensions as in the actual cost funding model.
- Budget transfers require an amendment if the consortium wants to reflect them in the grant agreement.

Transfer between work packages are possible if:

- work packages concerned are not already completed (and declared in a financial statement)
- justified by the technical and scientific implementation of the action.

Decoding Part B – CSA template

Fill in the title of your proposal below.

Title of the Proposal

Make sure that the title is interesting and there is no other project with the same title.

The consortium members are listed in part A of the proposal (application forms). A summary list should also be provided in the table below.

List of participants

Participant No. *	Participant organization name	Country
1 (Coordinator)	Always use full name of the organizations with abbreviation in the brackets	
2		
3		

1. Excellence – What? Why? How?

NCP RECOMMENATION

This is the section through which applicants can impress the evaluators – is foot in the door.

If an applicant is successful in exciting evaluators, it increases the chances of success. Introduction to the excellence section should answer to the question “What”: what is the challenge to be solved by the project, what is the idea of the project, what aim will be achieved, what you will do, what partners you have. And “Why” is this project important to your science field and institution?

Excellence section, and especially short to the point introductions, is about **storytelling of the project**.

There are **number of policy documents that applicants need to be aware of** before starting this section and mention the relevant documents applicable to the project in this section:

- The Pact for Research and Innovation
- Horizon Europe Strategic Plan 2021-2024
- Sustainable Development Goals (SDGs)
- European Commission priorities and missions

EC provides clear guidance in each application form with step-by-step guidance what is required to be included in in each section.

It is imperative that applicants follow the prescribed template and keep in mind the evaluation criteria.

Excellence

aspects to be taken into account.

- Clarity and pertinence of the project’s objectives
- Quality of the proposed coordination and/or support measures including soundness of methodology.

What does this evaluation criteria means? It means that applicants need to present (early on in the text):

1. Motivation for the project – why is this project idea is important? What is the problem consortium will try to solve? Why is it important to solve it now?
2. Project objectives (Section 1.1)
3. Methodology (1.2) – novelty, beyond state-of-the-art

1.1 Objectives

NCP recommendation:

- Topic/call scope. Project objectives need to refer back to the specific topic's scope, focus and terminology. Applicants should understand call and work programme's objectives which need to become project objectives using the same "language" and refer back to EU policies mentioned above (if applicable).
- Clarity of the text. The CSA form is only 30 pages, applicants need to avoid long background texts. The successful projects state project idea/aim/objectives on the first page of Part B (as part of one or two opening paragraphs). For example, "The main objective(s) of this project is/are ..." is a great way to start: applicants will save space for more important sections, evaluators will be aware of what you are trying to do from a start and it's a great way to start story telling of a project. Do not use the same words and terminology throughout, make sure that the language is dynamic for the evaluators.
- Include specific objectives (related to call topic). Aside from stating the overarching objective (aim) of the project, a set of specific objectives should be listed. These objectives should be specific, measurable, achievable, relevant, and time-bound (SMART) within the duration of the project.
- The projects that score highly in this section have objectives that are quantifiable, i.e. each objective has to have a KPI. Key Performance Indicators enable 'measuring' the overall performance of the project. Moreover, these specific objectives have to be in line with expected outcomes and expected impacts (Section 2 – Impact).
- The objectives described and listed in this section (1.1) have to be different from the operational & technical objectives, which will be listed in the work-packages (sub-section 3.1). What is the difference? The section 1.1 lists objectives that are linked with scope of the call/topic and are more of a macro level/ holistic level, whereas objectives in 3.1 are micro level (building blocks, going step-by-step through the operational tasks to achieve the project's goal). If done correctly, the accumulation of achievements in the second set (operational & technical objectives), will eventually lead to the full achievement of the first set of objectives (the specific objectives).

1.2 Coordination and/or support measures and methodology

NCP recommendation:

In the section 1.1. applicants have described the project aim, objectives, importance and relevance to the work programme – answered the questions “what”. Sub-section 1.2 is all about “how” and relates to the project idea, approach and methodology. How will the selected methodology enable the delivery of the results and achieving objectives?

The story that was introduced in 1.1 needs to be continued in 1.2 in detail. It’s important that this section is exciting, intriguing, highly competitive and detailed as applicants will present the project’s idea & approach, as well as the selected methodology that will enable it. As such, it serves

as the bridge to the more technical & operational Implementation section.

As with section 1.1, attention needs to be paid to specific requirements that might appear in the call text regarding particular organizations, networks, associations, initiatives, related projects or any other expected collaboration that should be addressed in the application.

Allocate about 4 pages of this section for presenting the main segment, including the concept, approach and methodology. The additional pages allocated to section 1.2 should be dedicated to other elements (interdisciplinarity, SSH integration, open science, data management plans, DNSH principal and etc.).

NCP recommendation:

- Idea (concept) of the project; main ideas, models, assumptions, etc. should be listed and presented in detail. The novelty of your project should be reflected in this sub-section – if it has already been done before, why should EC fund it? Applicants should provide scientific reasoning of the suggested concept/idea, so it’s clear for the evaluators that applicants are experts in the field.
- Even though Widening topics are CSA, in most calls there is an element of RIA, which might need to be addressed or positioned in terms of the TRL level (for example, TRL level is mentioned in the Excellence Hubs call).
- Coordination and/or support measures and methodology. How will the team achieve the aims/objectives? What steps need to be taken? It is advised to present an overall work plan of a project and explain the reason behind this approach. No need to describe each work package in detail, as applicants will have to do in section 3 (“Implementation”). Instead of diving deep into the “how”, in this sub-

section applicants need to elaborate on and explain the scientific methods, models and assumptions which underpin proposed work in the project. This sub-section should also reflect the innovative aspects of a project presented in section above (1.1.).

- Interdisciplinarity. Applicants need to describe how the elements and expertise from different disciplines will be used in the project in a complementary and comprehensive way. This does not mean to provide a “list of disciplines”, but instead an illustrated and integrated approach as to why these combined disciplines and the collaboration between them are fitting and necessary for achieving the objectives that have to be demonstrated. When doing so, bear in mind that this section is conceptual and refers mostly to the expertise associated with each discipline rather than to its executive role.
- Gender dimension. This aspect needs to be discussed in methodology section for those CSA proposals that have RIA as part of the

call (Twinning, Teaming, ERA Chairs, and Excellence Hubs). Applicants need to assess whether concepts, methods and approaches need to be designed differently when thinking of sex and gender differences. Importantly, this is not the place to discuss the gender balance in the consortium (this is done later on in section 3.3), only refer to sex and gender aspects of the content of the project's activities. If you consider that gender aspects are not relevant to the content of the project, this should be explained and justified.

- Open Science. This part should introduce the integration of Open Science practices in your methodology, such as early access to research results, open access to scientific publications and data, and co-creation of R&I content with stakeholders and the general public. If none of the Open Science practices are considered as relevant for your project, a proper justification should be provided. However, note that some practices are mandatory, for example, providing open access to scientific publications. Furthermore, in light of the importance and emphasis given to Open Science policy in the European Commission's agenda, it is strongly recommended to implement such practices. The recommended

length for this part is up to one page. You can learn more about Open Science in Horizon Europe here.

- Data management plan (DMP). Proposals including collection, generation or creation of data and/or other research outputs (except for publications) are obliged to provide Data Management plan (DMP) detailing how their research outputs will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable). This includes type, findability (i.e., identifiers that would help to reach the data), accessibility, interoperability (i.e., the ability to communicate and use the data by multiple people, including relevant standards and vocabularies) and reusability (permissions and tools for reuse of the data, such as Open Science commons and availability of needed software) of the research outputs, and the way they will be stored and its cost. DMPs are updated from time to time during the implementation phase, as the project progresses. Once your proposal is selected for funding, the initial DMP should be developed into a detailed plan. It becomes a mandatory deliverable that should be submitted by month 6 and revised towards the end of a project's lifetime.

2. Impact

NCP recommendation:

Horizon Europe is an impact driven framework programme. This focus has led to introduction of new Key Impact Pathways (KIPs), a modernized monitoring for evaluation of the programme approach, which will assess Horizon Europe success based on 9 key story lines (KIPs), grouped into three categories: scientific, societal and technological/economic impacts.

This section should demonstrate what short-medium-long term value (replace word impact for value in proposal drafting when writing the proposal for better understanding) will the project generate and how it will be achieved (pathways to impact)? How widespread will the value be? How significant will the benefits be?

The impact section is split in two main parts:

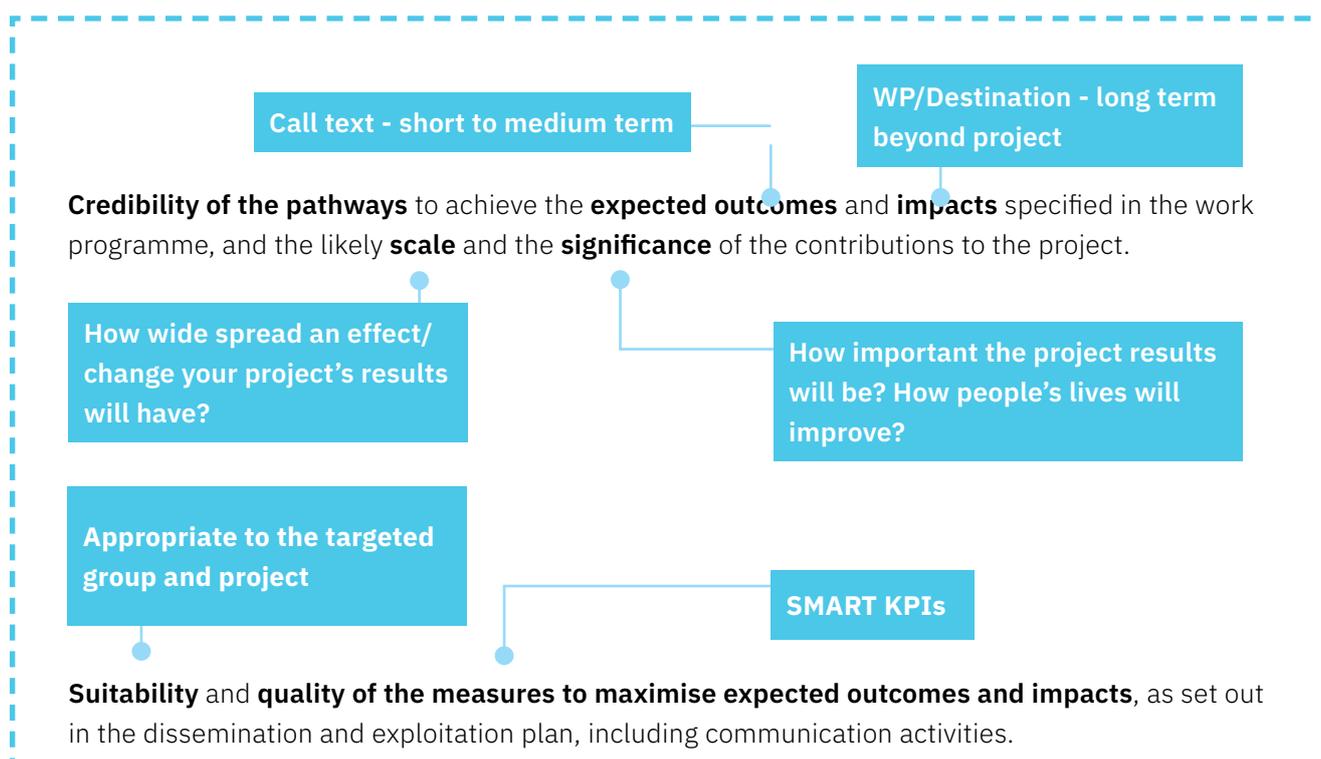
a) impact/outcomes and b) measures to maximize impacts/outcomes.

→ In the first part of the section (2.1), applicants need to link their project objectives with expected impacts (described in WP/ Destination – long-term impacts that go beyond the project duration). They need to be quantified, based on some sort of benchmark and clearly defined. After describing project contribution to wider impacts, applicants have

to link their project objectives to expected outcomes (identified in the call text – short to medium term, 2-5 years), and again identified expected outcomes have to be quantified and benchmark explained.

In addition to describing these, it is imperative that applicants explain how great (reaching different stakeholder groups, geographical

The evaluation criteria could be presented graphically explaining in more detail what evaluators are looking for:



Author: Aurelija Povilaike, Research Council of Lithuania

reach) of a change the project effects will have (scale) and how important they will be (significance).

- When applicants are describing quality of measures to maximize outcomes and impacts

(2.2), it is important to have clearly identified SMART KPIs and clear project specific targeted groups identified.

The measures have to be clearly linked with targeted stakeholder groups.

2.1 Project's pathways towards impact

Pathway to impact - logical steps towards the achievement of the expected impacts of the project over time, in particular beyond the duration of a project.

A pathway begins with the projects' results, to their dissemination, exploitation and communication, contributing to the expected outcomes in the work programme topic, and ultimately to the wider scientific, economic and societal impacts of the work programme destination.

2.1(a) In this section applicants are expected to describe, in 4 pages, how will the project results make a difference/change within (expected outcomes) and beyond (impacts) project duration.

- Applicants need to take each expected topic outcome, i.e. **“Expected topic outcome.** Improved excellence capacity and resources in Widening countries enabling to”, and describe **how will** this outcome be achieved (mentioning WPs, competences of the partners, and activities). After describing this, it is mandatory to mention **the scale of the targeted group**, which will be affected by this change; include quantified estimates of this short-medium term impact and outline **significance** to the group of researchers, institutional, regional, national and European level. The project's outcomes should directly correspond to the expected outcomes set in the topic description.

Such an approach needs to be repeated with each expected topic outcome. Once each expected topic

outcome has been addressed, applicants should demonstrate how the project results will contribute to work programmes planned impacts (wider impacts that go beyond project duration). This can be done in many ways, but it is advisable to group the wider impacts into three categories: scientific, technical, social, environmental, economic, societal impacts and to make sure that they include the relevant KPIs. All KPIs need to have explained benchmark and reasoning why such KPIs have been chosen.

Strong pathways can be ensured by involving a variety of stakeholders in the co-creation of the project plan from the beginning. This approach is guaranteed to deliver widespread benefits such as the ones the European Commission is looking for.

2.1 (b) The proposals that score low in “Impact” section do not include or provide a very general description of barriers and obstacles, which relate to expected outcomes and impact **and not** project implementation. When listing barriers and obstacles, applicants need to provide mitigation strategies and how these will be overcome. That is why the good proposal should consist of potential project's risks and barriers, its probability and mitigation.

The applicants need to convince the evaluators reading the project proposal that the project can essentially meet expectations during its execution/ implementation in relation to topic scope, expected outcomes and expected impacts. IPR strategy and knowledge management should not be ignored even in CSA applications.

2.2 Measures to maximize impact – Dissemination, exploitation and communication

Impacts of the project are an incredibly important element, hence each project has to have a solid plan/strategy how these impacts will be maximized. Such a plan/strategy needs to include: dissemination, exploitation and communication.

NCP recommendation: The proposed strategy/plan can be presented in a table format which explains the communication strategy used, proposed actions, evidencing the targets of communication and the quality of dissemination during the lifetime of the project and beyond. As for example:

Targeted groups	Means of reaching those targeted groups	Outcomes	Indicators and targets
Industry	Trade fairs (specific to the scientific field); social media; roundtable discussions; newsletters; knowledge transfer partnership meetings	Build relationship with potential partners in industry for future collaborations and KTPs	Numbers of meetings with companies (±10)

2.3 Summary

NCP recommendation: In this section applicants need to provide an effective summary of the messages included in the ‘Impact’ section to the evaluators. Applicants should not change to structure of this table and present all information as required (could reduce the shrift to fit into one page).

KEY ELEMENT OF THE IMPACT SECTION

EXPECTED RESULTS

What do you expect to generate by the end of the project?

- Detail the key results that the project will generate (prototype, demonstrators, PhD students, TechTransfer office and etc., increased competences and etc.)
- (Information from: Excellence Section 1.1 and 1.2 & Implementation Section 3.1 and 3.2)

D & E & C MEASURES

What dissemination, exploitation and communication measures will you apply to the results?

- Detail the D, E and C measures for the project, tied to the expected results.
- (Information from: Impact section 2.1 and 2.2)

SPECIFIC NEEDS

What are the specific needs that triggered this project?

- What is the challenge that your project seeks to address in the context of the call topic
- (Information from Excellence Section 1.1 and section 1.2)

TARGET GROUPS

Who will use or further up-take the results of the project? Who will benefit from the results of the project?

- Name specific groups and tie them to D, C, E measures.
- (Information from Impact Section 2.1 and section 2.2)

IMPACTS

What are the expected wider scientific, economic and societal effects of the project contributing to the expected impacts outlined in the respective destination in the work programme?

Breakdown into types of impact and provide metrics where possible

(Information from: Impact section 2.2)

Things NCP should ask applicants when writing Impact section:

- What expertise and infrastructure will you need to deliver expected outcomes?
- Which partners will help you maximize C, D, E measures to ensure you reach the targeted group and achieve impact?
- Have you included all the necessary targeted groups for the impact you are trying to achieve?
- Remember: stakeholders are not only for the dissemination of project results, they need to be part of the co-creation process.

OUTCOMES

What change do you expect to see after successful dissemination and exploitation of project results to the target group(s)?

This must be in line with the expected call outcomes. Tie this to specific target metrics.

(Information from: Impact Section 2.1)

3. Quality and efficiency of the implementation

The detailed work plan presented in this section becomes a contractual obligation that must be thoroughly executed once the project is funded, hence this section needs attention and time to be written properly.

This section will be evaluated by considering the following criteria:

Quality and efficiency of the implementation – aspects to be taken into account

- 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.

3.1 Work plan and resources

This section (around 10 pages, including tables) will be composed of different work packages (WPs) and activities, which will have to be coherent, clearly understood and read as one voice. There is a practice to ask different partners to write WPs they are responsible for, however, there is a danger that “one voice” could be lost and the implementation plan would become incoherent. It is better to have few meetings with partners before starting with creating work packages and to ask the partners to present you their

capabilities, capacities, needs and expectations from the project. This way the coordinator will be able to create coherent WPs that have logic and flow. Applicants should present an overall work plan overview in this section before listing each WP separately, this will give an overview for the evaluators. This can be done via PERT diagram or some other graphical representation.

NCP recommendation:

Once the partners provided the coordinator with capabilities, capacities and needs to complete the tasks in WPs, there needs to be a discussion about time and resources:

- Coordinator should ask the partners to provide the following: estimate the time and resources for each of the tasks (not only at the level of the work package, as expected according to the official proposal template) - specifying person-months allocation per task, per partner, and any other associated costs.
- All partners need to agree on timeline on various tasks and how each task complements each other. This, again, should be done at the level of tasks and not just at the level of work packages. Making this effort will force

the partners to think in more depth about their suggested work and this is going to be beneficial to all on both fronts, the evaluation front (and how the evaluators will look at it) and the execution front (which will make the plan more accurate and feasible). Sometimes, these details might be based on a rough estimation at the time of the proposal making. It is better to have rough estimations than no estimations at all.

The budget appears in two different sections (Part A+B) of the proposal while using a set of various tables (all below) can create a loss of important information or inconsistency between the different parts. To best handle this issue, NCP recommends to create one consolidated table that collects and summarizes all the relevant data from all

consortium partners. This table is external to the proposal (usually created by the coordinator), and will only be used internally to ensure the budget is consistent and exhaustive. Once this table is set, and all the information make sense together, the applicant can begin filling out the budget sections of the proposal by splitting up the information in the manner requested throughout the various sections.

When consolidating partners' budget, it is important to pay attention to these tips:

Avoid allocating more than 30% of the overall

budget to a single partner (for Widening CSA actions coordinator should have more than 30% of the total budget).

- Avoid allocating more than 40% of the overall budget to a single country (all partners from the same country put together, however, this does not apply to Widening coordinator).
- The budget allocated for coordination and project management activities (mostly by the coordinator) should be in range between 3% and 5.5% of the overall budget.

3.2 Capacity of participants and consortium as a whole [e.g. 3 pages]

- Describe the consortium. How does it match the project's objectives, and bring together the necessary disciplinary and inter-disciplinary knowledge. Show how this includes expertise in social sciences and humanities, open science practices, and gender aspects of R&I, as appropriate. Include in the description affiliated entities and associated partners, if any.
- Show how the partners will have access to critical infrastructure needed to carry out the project activities.
- Describe how the members complement one another (and cover the value chain, where appropriate)
- In what way does each of them contribute to the project? Show that each has a valid role, and adequate resources in the project to fulfil that role.
- If applicable, describe the industrial/commercial involvement in the project to ensure exploitation of the results and explain why this is consistent with and will help to achieve the specific measures which are proposed for exploitation of the results of the project (see section 2.2).
- Other countries and international organizations: If one or more of the participants requesting EU funding is based in a country or is an international organization that is not automatically eligible for such funding (entities from Member States of the EU, from Associated Countries and from one of the countries in the exhaustive list included in the Work Programme General Annexes B are automatically eligible for EU funding), explain why the participation of the entity in question is essential to successfully carry out the project

Tables for section 3.1

Table 3.1a: List of work packages

Work package No	Work Package Title	Lead Participant No	Lead Participant Short Name	Person-Months	Start Month	End month
				Total person-months		

The WPs structure, during the evaluation phase, enables the experts reviewing the application to assess the work involved in the project in terms of logic, relevance, collaboration, coherence, effectiveness, competitiveness, innovation, etc. More importantly – the WPs presentation is in fact a primary justification for the requested grant. Therefore, it is of utmost importance to make it as competitive as possible (while still possible for execution).

It is imperative that applicants develop the project idea/concept first and only afterwards define the

WPs, which in turn will derive from the project’s objectives. Concept Objectives Task to achieve those objectives (WPs).

For the WPs to be coherent, it is important to have one leader (Widening coordinator) to handle the process of the project’s concept and work plan structure. Partners can provide an input and feedback, but the writing and ownership should be by one person.

NCP recommendation:

- The work plan and work package structure must make perfect sense to the evaluators.
- Avoid redundancies, overlaps and gaps between the tasks within a given work package and across the various work packages – that is the key.
- After partners provide their input, it is important for the coordinator to unify the text and make it sound as one project.
- CSA is collaborative action, hence it is important to demonstrate the collaborative work present in each WP – avoid the presentation of a single partner in a work package.
- The same applies when presenting partners in all WPs. The aim is to show the diversity of work in these projects. If all partners are included in all work packages, it may not make sense in the eyes of the evaluators. As an exception to that, it might be relevant to put all partners in “horizontal” work packages (e.g., the work package that deals with dissemination, communication and exploitation of results).

- Use the work packages and assignments of tasks to partners within the work packages to express the workflow and the collaborative work (e.g. Task 3 done by partner #7 in WP2 will feed the work of partners #2 and #5 in Task 1 in WP4, and so on). Use it wisely and clearly in a way that will allow the evaluators to follow your logic.

To conclude, work packages are the backbone for any Horizon Europe project. As such, they must be regarded with great importance and prepared with attention and detail. A successful work packages structure will not only prove helpful during the evaluation stage, but also serve as the guiding path during the project's execution.

Table 3.1b: Work package description

For each work package:

Work package number		Lead beneficiary				
Work package title						
Participant number						
Short name of participant						
Person months per participant:						
Start month			End month			

Objectives

Link it back to objectives in Section 1.1

Description of work (where appropriate, broken down into tasks), lead partner and role of participants

- Make sure that the tasks are not repeating, there are no overlaps and it is clearly described what each of the partners will be doing.
- Verify that the track record of the personnel involved in the project correlates to the expected tasks. Avoid a presentation of personnel that might not be the right one for performing the action.
- In case there is a need for infrastructure or technical equipment, applicants need to elaborate on that in the profile of the relevant partner, while referring to that also in the work packages (and maybe also in section 1.2, as needed).

Deliverables (brief description and month of delivery)

- 2-3 well-defined and well-thought-out logical deliverables per work package.

Table 3.1c List of Deliverables

Only include deliverables that you consider essential for effective project monitoring.

Deliverable (number)	Deliverable name	Work package number	Short name of lead participant	Type	Dissemination level	Delivery date (in months)

Deliverables

These serve as a means of progress assessment throughout the lifetime of the project. They as well become official contractual obligations under the grant agreement. It is crucial to remember that the deliverables are produced on top of the progress reports required by the EC in each reporting period. The typical mistake that we see is having too many deliverables in the project proposal in general, and

per work package in particular. Many believe that the evaluators seek out as many deliverables as possible. However, this is not true. The evaluators seek mainly for a logical framework in the way the work plan is presented, which may contain also a logical set of deliverables. This need not be morphed into a long list of deliverables.

NCP ADVICE

NCPs advice: recommend listing around 2-3 well-defined and well-thought-out logical deliverables per work package.

Table 3.1d: List of milestones

Only include deliverables that you consider essential for effective project monitoring.

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification

¹ You must include a data management plan (DMP) and a ‘plan for dissemination and exploitation including communication activities as distinct deliverables within the first 6 months of the project. (There is an opening, but no closing quotation mark in this sentence). The DMP will evolve during the lifetime of the project in order to present the status of the project’s reflections on data management. A template for such a plan is available in the Online Manual on the Funding & Tenders Portal.

Table 3.1f: Summary of staff effort

The information about person-month allocations per partner and per work package should be summarized under this table (should perfectly reflect and summarize the information provided in the various work packages).

	WPn	WPn+1	WPn+2	Total Person-Months per Participant
Participant Number/Short Name				
Total Person Months				

Personnel costs (main segment of most projects):

→ **Calculation of personnel costs**

When calculating the personnel costs for the project proposal, the first element that the coordinators are interested in is the average monthly cost of employment of the personnel that is expected to participate in the project of each partner. The average monthly cost of employment should include the salaries alongside any additional employer’s payments (such as social benefits, pension, etc.). There is no need to get into the fine details of all salaries and additional payments. The main focus here is the average cost of employment of relevant personnel. Normally, it is up to the financial department of the partner’s institution to provide these required figures following Horizon Europe new method of calculating this.

→ **Allocation of person-months per work package**

This next element that coordinator should be interested in will stem from the work assigned to each partner based on the discussions on the expected role and tasks in the process of developing the work plan. In this process, each partner should estimate how many person-months it should allocate per task in the work packages. These allocations are then added up to the total amount of person-months per partner.

The overall personnel charge per partner is essentially the average cost of employment (for the given partner) multiplied by the total of person-months allocation (for the said partner).

Do not forget: the average cost of employment on one hand and the person-months allocation, on the other hand, are relevant mainly for the pre-award phase and the proposal evaluation process. Later on, in the post-award phase, during the project’s execution, the personnel calculation is done using a different scheme which is based on the daily rate, which should be monitored carefully during the project’s execution, and might be audited by the EC later on in potential financial audits. This may cause discrepancies between the early pre-award personnel charge calculations and the post-award personnel charge calculations. The complexity of these discrepancies is something to consult with the financial department in institutions and get their support and approval for your personnel budget request, both for the pre-award and the post-award phases.

Table 3.1g ‘Subcontracting costs’ items

A table showing a description and justification of subcontracting costs for each participant – each partner should describe the tasks that it is going to subcontract (if any) and proper justification for that, alongside the associated costs.

Participant Number/Short Name		
	Cost (€)	Description of tasks and justification
Subcontracting		

Sub-contracting and 3rd parties:

- Any cost that might be directed towards sub-contractors should follow the guidelines of “best value for money” and be described and justified by the relevant partner. Make sure that the project’s core tasks cannot be subcontracted.
- Keep in mind that subcontracting costs are not eligible for the 25% flat-rate addition of indirect costs.

Table 3.1h Purchase costs items (travel and subsistence, equipment and other goods, works and services)

Information and justification for purchase costs of the following cost categories (per partner): travel and subsistence, equipment and/or other goods, work and services. The rule here is that each partner should provide details for the purchase costs that sum up over 15% of the personnel costs allocated to the partner. The sum of the remaining purchase costs that are below the 15% mark (of personnel costs) can be presented here without additional justifications.

Participant Number/Short Name		
	Cost (€)	Justification
Travel and subsistence		
Equipment		
Other goods, works and services		
Remaining purchase costs (<15% of pers. Costs)		
Total		

Travel & subsistence costs:

- Travel & subsistence costs can be associated with specific tasks or work packages, although it is not a must. It is perfectly fine to present a general travel budget (per partner) for the entire project.
 - NCPs recommend having some kind of a breakdown. Since it is hard to predict the exact costs of future travel expenses, NCPs recommend using an average cost of travel & subsistence and multiply it with the expected number of trips planned during the project. The average travel cost should include transport, accommodation and subsistence per person, for a period of 2-3 days.
 - Travel is of course expected when implementing a Horizon Europe project. However, it is important not to overdo it. It is essential to keep the travel budget realistic and appropriate to the amount of involved personnel (per partner) and associated task.
 - Equipment costs
 - Check specific call description and eligible costs for CSA what if any equipment is eligible.
 - Horizon Europe equipment budget requests should typically be claimed based on their depreciation value according to the local tax regulations of each partner. The financial department in the institutions should be able to assist in this regard.
-

Table 3.1i 'Other costs categories' items (e.g. internally invoiced goods and services)

There are several 'other costs categories', in addition to the ones mentioned above, that can be added to the Horizon Europe project's budget. If one of these other cost categories is relevant to your project, a justification under table 3.1i should be provided. Keep in mind that most of these 'other costs categories' cannot benefit from the addition of the 25% flat rate of indirect costs.

Participant Number/Short Name		
	Cost (€)	Description of tasks and justification
Internally invoiced goods and services		

Other goods and services costs:

- Any other goods and/or services required for the direct execution of the project can be added to the requested budget.
- In case a partner's total grant surpasses €430,000, a Certificate on Financial Statements (CFS) is required to be submitted once the project ends. A CFS is normally issued by an external auditor. The cost of producing the CFS is eligible and should be included in the partner's budget estimation under this category.

Decoding Widening Instruments

This section will provide the insight into the main Widening call topics. Some of the projects have been funded and the ESR analysis will explain how the successful projects performed against the evaluation criteria (excellence, impact and implementation).

Twinning

Twinning call for proposals has been established as one of the ‘traditional’ funding instruments of the ‘Widening Participation and Strengthening the ERA’ Work Programme since Horizon 2020. In the context of Horizon Europe, this instrument continues to support the enhancement of networking and R&I capabilities of institutions from Widening countries by linking them with their advanced counterparts, while focusing on specific aspects highlighted in the related call. With this document, we aim to provide an overview of the important aspects that the evaluators

indicated through the evaluation procedure performed for the first Twinning call in Horizon Europe (topic identifier: HORIZON-WIDERA-2021-ACCESS-03-01). In parallel, we provide a more in-depth analysis of the main comments included in the ANNEX V, as these were extracted randomly, from various proposals covering all scoring ranges. Both the attached document and the brief analysis provided below are structured around the three main evaluation criteria. We summarize the main observations resulted from analysing ESRs randomly, as follows:

Excellence – several comments referred to the necessity of clear, well-formulated objectives and the requirement to have a SMART structure. Evaluators especially commented that these should be realistically achievable and in line with the work programme topic. Special reference highlighted that more detailed objectives concerning the strengthening of research management and administration capabilities of the Widening

institutions should be included, as requested at topic level. Other important aspects highlighted by the evaluators were the alignment of data management plans with the FAIR principles and the necessity for a more detailed description considering all related approaches. In addition, elaboration on the use of Open Science practices needs to be well analyzed and special emphasis is given to gender equality practices to be followed.

Impact – comments mainly addressed issues concerning the overall planning in maximizing the impact of the proposed project. Alignment of impacts with the expected outcomes of the work programmes and their credibility was also included as well as the level of achievability, and their scale and significance. Furthermore, the pathways towards impact needed to specify enhancement of networking capabilities and transfer of knowledge and best practices from the leading counterparts to the Widening institutions, in line with the call requirements. Another important aspect was to define any obstacles and barriers relating to achieving outcomes and impacts, while analyzing on

various levels (i.e. legal, economic, social, and political). Related mitigation measures are also a requirement needed to be addressed tightly in line with proposed project activities. Furthermore, dissemination, exploitation and communication activities (D&E&C) are of major importance to be well elaborated. Special focus is given to a set of important aspects such as IP management, communication activities, related tools and targeted audiences and exploitation and knowledge protection. D&E&C activities should showcase an enhancement of networking activities of the consortium members, while strengthening research management and administrative skills and the profile of Widening institutions involved.

Implementation – evaluators’ comments were structured around the common parts of the implementation section. More specifically, around the work plan and the necessity to be well-structured and of high quality. Furthermore, a clear description of the work packages, Gantt chart and interrelations of the Pert diagram needed to be included, correlating with the deliverables and milestones. Twinning is a CSA grant but a research component not exceeding 30% of the total Horizon Europe grant was allowed. Therefore, comments

indicated the necessity of a more balanced work plan and the research component not to be overly dominant towards the CSA activities. Evaluators also commented on the necessity for a clear collaboration between the consortium members as well as on their capacity, while a clear collaboration plan and establishment of long-term sustainability needed to be included. Credibility of the risk assessment and related mitigation measures for implementing the twinning exercise needed to be addressed.

Below is a summary list of the main documents related to the particular call for proposals to which the NCPs should be aware of, provided as start-up guidance:

- Call for proposals
- Work Programme (introduction part and Destination 1 description)
- FAQs provided by (1) EC and (2) NCP_WIDERA.NET Project
- HE Proposal Standard Application Form
- Eligibility conditions as described in Annex B of the HE Work Programme General Annexes and admissibility conditions as described in Annex A and E of the same document.
- Award criteria, scoring and thresholds as described in Annex D of the HE Work Programme General Annexes
- Submission and evaluation processes as described in Annex F of the HE Work Programme General Annexes and the Online Manual
- Any Call for Proposals updates, as these are included in the ‘Call Updates’ Section on the Topic page in the Funding & Tenders Portal.

Excellence Hubs

Excellence Hubs are a new action under the widening package; networks of place-based innovation ecosystems in widening countries involving larger communities of actors in a regional context based on the quadruple helix principle. Excellence Hubs focus on innovation by allowing innovation ecosystems in widening countries and beyond, to team up and create better linkages between their constituents that mutually reinforce each other in the transformation of scientific knowledge, namely academia, business, government and society. Excellence Hubs should improve access to excellence for R&I actors in Widening countries and elaborate joint R&I strategies that are aligned with national, regional (notably RIS3) and/or European strategies or policy

priorities (e.g. Green Deal, Digital transition). With this document, we aim to provide an overview of the important aspects that the evaluators indicated through the evaluation procedure performed for the first Excellence Hubs call for proposals in Horizon Europe (topic identifier: HORIZON-WIDERA-2022-ACCESS-04-01).

In parallel, we provide a more in-depth analysis of the main comments included in the ANNEX VI, as these were extracted randomly from the 10 project proposals approved for funding. Both the attached document and the brief analysis provided below are structured around the three main evaluation criteria. We summarize the main observations resulted from analyzing ESRs randomly, as follows:

Excellence – The evaluators considered the objectives of all the 10 projects as very clearly stated, measurable, verifiable, ambitious and realistically achievable. The objectives are also pertinent to the work programme and address very well the need for place-based innovation ecosystems. In all the 10 projects research data management and the management of other research outputs are in line with FAIR principles. Open science practices in these projects are well

considered, taking into account open sharing of results and ensuring their quality and transparency. Despite the fact that gender is not an issue for some of the proposals the gender equality within the consortia is well intended. Measures for staff exchanges, twinning of activities between ecosystems, skills development for research and innovation management and citizen engagement represent an added value for the majority of the 10 projects.

Impact – Overall, the proposed pathways to achieve the expected outcomes and impacts specified in the work programme are highly credible and convincing. In some cases the pathways comprise an innovative mix of traditional and novel approaches. Potential barriers, that may determine whether the desired outcomes and impacts are achieved, are appropriately identified and appropriate mitigation measures are proposed. However, sometimes, although some technological barriers are mentioned, other potential barriers beyond the control and scope of

the project – including other R&I achievements by competitors, regulatory environment and mitigation measures towards achieving the goals despite these barriers – are insufficiently addressed. The dissemination and communication plans in the 10 projects are appropriate to the scale of the projects. In some cases there is also appropriate amount of information about dissemination and communication activities beyond the end of the project. It is clearly stated that dissemination and communication strategies are comprehensive and include all stakeholders. Clearly described KPIs

are associated with each of the dissemination and communication measures. There is a case when the dissemination and communication plan will be prepared after the beginning of the

project activities, but the communication and dissemination framework included in the project proposal is already very comprehensive and credible.

Implementation – The work plans are comprehensive and robust, containing all the necessary elements for the successful implementation of a high-quality CSA. The work packages (WPs) follow a logical structure, have an appropriate timeframe and interconnections between them. Milestones and deliverables are well specified and timed to allow for the effective monitoring of the proposed projects` progress. In some cases the number of deliverables is not fully proportionate to the work package complexity; some deliverables and research activities lack sufficient detail to convincingly justify costs; some milestones are too generic to support effective go/no-go decisions. The proposals demonstrate that the consortia as a whole bring together the

necessary expertise to implement the projects. The members of the consortia complement each other and there is a good balance between western European partners that are active in multiple ecosystems and those in the consortia with less experience. Each partner has the resources, infrastructure and skills to fulfil their roles and tasks. The consortia are a balanced match of research and business communities, policymakers and CSOs/agencies. Well considered critical risks relating to projects implementation are identified and rated according to their likelihood and severity. Convincing sets of mitigation measures are proposed however there are some mitigation measures that are not convincingly addressed which is considered as a minor shortcoming.

Below is a summary list of the main documents related to the particular call for proposals to which the NCPs should be aware of, provided as start-up guidance:

- Call for proposals
- HE Main Work Programme 2021–2022 – 11. Widening participation and strengthening the European Research Area
- HE Main Work Programme 2021–2022 – 13. General Annexes
- FAQs provided by (1) EC and (2) NCP_WIDERA. NET Project
- HE Proposal Standard Application Form – call-specific application form is available in the submission system
- Admissibility conditions: described in Annex A and Annex E of the Horizon Europe Work Programme General Annexes
- Eligibility conditions: described in Annex B of the Work Programme General Annexes
- Financial and operational capacity and exclusion: described in Annex C of the Work Programme General Annexes
- Award criteria, scoring and thresholds are described in Annex D of the Work Programme General Annexes
- Submission and evaluation processes are described in Annex F of the Work Programme General Annexes and the Online Manual
- Indicative timeline for evaluation and grant agreement: described in Annex F of the Work Programme General Annexes
- Legal and financial set-up of the grants: described in Annex G of the Work Programme General Annexes
- Any call for proposals updates, as these are included in the ‘Call updates’ section on the topic page in the Funding & Tenders Portal.

EXCELLENCE HUBS (HORIZON-WIDERA-2022-ACCESS-04-01) INSIGHT

102 project proposals submitted

10 are in the main list for funding (to be invited to grant preparation)

5 projects coordinated by Greece

2 – by Czech Republic

1 – by Portugal

1 – by Turkey

1 – by Slovenia

Additional information:

- 5 projects in reserve list
- 46 projects within the threshold (the lowest 10 points) but below available budget
- 41 projects below the threshold of 10 points – 2 of them have respectively 11 and 10 points, but have fallen under the threshold in one of the evaluation criteria – the first project (DigiServHub) in Quality and efficiency of the implementation, and the second (INNOAIMGREEN) in Excellence.
- Number of participants from research organisations in retained for funding proposals: 18
- Number of participants from private for profit organizations (excl. education) in retained for funding proposals: 40
- Number of participants from public body (excl. research and education) in retained for funding proposals: 14
- Number of participants from other type of organization in retained for funding proposals: 34
- Total number of participants in retained for funding proposals: 138 (45 female, 92 male, 1 non-binary)
- Number of coordinators in retained proposals: 2 female, 7 male, 1 non-binary
- Recommended EU contribution in retained for funding proposals: 47,984,534.25 €.
- The evaluation of proposals for this call was carried out between 01/04/2022 and 28/06/2022, by 100 external experts. As a result, out of the 100 invited experts:
 - 51 female and 49 male
 - 62 came from universities and public or private research organizations (29 female and 33 male)
 - 29 were from private commercial firms (16 female and 13 male)
 - 2% were considered new and brand new experts
 - 91 from EU member states, 6 from associated countries, 3 from third countries.

Teaming for Excellence

The Teaming action is designed to support the creation of new centres of excellence or upgrading the existing ones in low R&I performing countries (except those centres of excellence that have already benefitted from previous Teaming calls).

It is building on partnerships between leading scientific institutions in Europe and the main beneficiary institutions in low R&I performing countries that display the willingness to engage together for this purpose.

Consortium composition and eligibility:

Participation as coordinators to the call is limited to legal entities established in Widening countries, as defined in the Horizon Europe regulation.

A Teaming project must involve at least two beneficiaries: a) the main applicant organisation (the coordinator) which will be a university or a research organisation, a national or regional authority or a research funding agency, and b) at least one leading university or research organisation established in another Member State or Associated Country as an advanced partner.

The project must have a complementary funding (e.g. national and/or regional funding, European funding, such as from Cohesion policy programmes, or private sources). Its total amount

must at least equal the total requested Horizon Europe contribution (between 8-15 million euros for up to 6 years of the project).

In the Horizon Europe Teaming call consists of two stages. In the first stage applicants need to submit 10 page application form, where the R&I excellence and the conceptual approach for the centers of excellence will be evaluated.

Proposals invited to the second stage must include an investment plan for the full project including a binding commitment for the necessary complementary funding (12 page Annex document explaining how the complimentary funding will be used, where it is coming from and how it is linked with the rest of the WPs).

Evaluation duration:

for two-stage proposals: 3 months for the first stage, 5 months for the second stage, and 8 months for signature of the grant agreement in the second stage

Type of call and scope: Bottom-up calls covering all area but they need to be strictly within scope of the Smart Specialization Strategy of the country/region of the Coordinator. Also, it would be beneficial also to align the proposal with overarching European policy objectives and the UN Sustainable Goals. The Scope is to create Centers of Excellence (CoE) in Widening countries. CoE has to be an autonomous structure which can act as a role model to stimulate excellence, new investments and reforms of national research and innovation systems in Widening countries.

Minimum of two partners will team up to create a consortium with the aim of the 'advanced partner' to help the widening partner to step up, improve or create a center of excellence in the Widening country.

The co-financing will be in equal parts. One part from the Horizon Europe and an equal amount from other sources (can be national funds, ERDF, RRF, private funds, etc.). The Horizon Europe part will fund the operational costs of the CoE, whilst the other part of the co-financing will fund the Infrastructure costs of the CoE. Synergies with other funds and programmes is strongly encouraged.

What EC is looking for ? To create or modernize a CoE, relevant at a national level, in a chosen

scientific domain. It is looking to reinforce the value added of the smart specialization areas and enable more focused, thematic research outputs. This financial instrument related directly to Action 16, “Improve EU-wide access to excellence” of ERA policy.

This is a bottom up call, hence proposals are invited from any thematic area or domain – the requirement from a policy perspective is that the proposal needs to fit into the smart specialization priorities of the applying MS.

In Teaming the strongest impacts are linked

to strengthening skills originating from new international activities and R&I collaborations, as well as from publishing in high impact journals and developing new research topics and interests. This is coupled with increased investments, more in-depth focus in specific smart specialization areas and attracting new talents.

Teaming action is expected to become an influential and meaningful bridge, particularly between smart specialization strategies and excellence in R&I, and raising the research profile of the applying country.

What results EC are looking for (use examples from practice if possible): new projects; technology transfer to industry; access to market; scientific and complementary skills trainings; scientific articles.

Expected outcomes:

Increased scientific capabilities of the beneficiary institution and the host country enabling them to successfully apply for competitive funding in the EU and globally

- Improved R&I culture of the coordinator country
- Stimulus for institutional and systemic reforms
- Mutual learning and two-way benefit from and to the partners from leading scientific institutions from abroad
- Development of new research strands in relevant domains
- Developed and enhanced research and innovation capacities and the uptake of advanced technologies
- Enhanced innovation and integration of planned processes, services and products of the centre
- Enhanced co-operation and synergies.

Provide tips and tricks from NCPs experience on specific calls:

- Carefully read the call text, guide for applicants, evaluation criteria
- Know the conditions & “challenge”
- Be familiar with the projects already funded under the same call or in other parts of the programme
- Be concise and clear (particularly in Stage 1)
- Be factual and provide links and references to back up your proposal
- Understand that if it’s not there, it can’t be evaluated
- Go beyond the obvious
- Be credible in all aspects (referencing is important)
- Describe well the problem or vacuum that currently exists and how this new CoE will go about filling the vacuum
- Carefully roll out the plan for the six year duration and beyond
- Sustainability of the CoE plays an important role in the evaluation

HopOn Facility

The Hop-On Facility call foresees the possibility for legal entities from Widening countries to join already selected collaborative research and innovation actions' (RIA) consortia, provided that no legal entity from any Widening country is already participating in the consortium. With this document, we aim to provide an overview of the important aspects that the evaluators indicated through the evaluation procedure performed for the Hop-On Facility call in Horizon

Europe (topic identifier: HORIZON-WIDERA-2022-ACCESS-07). In parallel, we provide a more in-depth analysis of the main comments included in the ANNEX VIII, as these were extracted randomly, from several proposals covering all scoring ranges. Both the attached document and the brief analysis provided below are structured around the three main evaluation criteria. We summarize the main observations resulted from analyzing ESRs randomly, as follows:

Excellence – evaluators indicated, that generally it is important to have clearly stated and pertinent project objectives. More detailed analysis reveals that evaluators particularly highlights the importance of convincingly described interaction and enhancement of project's objectives with the addition of the Widening partner. Successful data management description is characterized as clearly identified, integrated, innovative, robust

and ambitious; generality should be avoided in data management. Particular necessity of novelties or modifications of existing practices were not mentioned as an expectation from Open Science practices – it is important to consider the Open Science and describe it sufficiently. Also, even if the gender dimension is not described in the project proposal, Gender Equality Plans were checked in partner's organizations.

Impact – the pathways to achieve enhanced outcomes and impacts are credible and convincingly presented. Experts underlines the importance of integration of pathways with the expected outcomes and impacts of the work program. The largest amount of comments was devoted Dissemination, Exploitation and Communication activities. Proposed measures are convincing, well planned and addresses various audiences, including also young generation and

web/social aspects. Intellectual Property (IP) management of each partner is in line with the strategy of the consortium. However, also flaws and shortcomings of Dissemination, Exploitation and Communication activities were indicated, such as: lack of key performance indicators (KPIs) to measure the impact towards the expected outcomes; non-existing or insufficiently addressed or not clearly evident IP management.

Implementation – generally, work plans are clearly effective, professionally prepared and oriented towards the project's objectives. Evaluators emphasize the importance of clearly describing the role of the new partner, reflecting the integrity of partner's activities in the work plan.

Milestones and Deliverables are described as appropriate for the research and coherent; associated tasks and partners are considered; included Pert and Gantt charts are realistic. The added value of the new partner is one of the key aspects under this topic, so milestones and

deliverables, related to the new partner, are clearly and convincingly outlined and justified. Also, shortcomings are being identified, such as generic manner and adding the proposed contributions to already existing work packages, rather than establishing a new ones. Capacity of consortium is well presented, demonstrating high qualification and international recognition of partners, as well as general professionalism, necessary for successful implementation of the project. Description of

capacity of the Widening partner accentuates new partner's credibility, ambitiousness and networking capacity. Risk assessment and mitigation measures are presented as credible and supported by relevant and realistic mitigation measures, but several significant flaws are mentioned: insufficient measures for establishing high risk-high gain value; lack of integration of risk-mitigation strategy into project's impacts and objectives.

Why were they created?

The Hop-On Facility was created to stimulate the participation of Widening countries research institutions in Horizon Europe Pillar 2 actions and EIC Pathfinder actions, with the objective of closing the participation gap in Horizon Europe and the innovation divide in the EU.

One of the policy objectives of the call is to open up established closed networks of research

institutions and boost excellence and innovation in Widening countries within specific fields connected with Pillar II. Moreover, it wants to build up new competences in beneficiaries from Widening countries that will acquire skills on research management, dissemination and exploitation of results through constructive cooperation with partners in advanced countries.

Who can participate:

1. A consortium already funded under Pillar 2 or the EIC Pathfinder RIA with a valid grant agreement but no partner from a Widening country.
2. A legal entity from a Widening Country interested in becoming a new partner in a RIA. The HE regulation indicates Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland,

Portugal, Romania, Slovakia and Slovenia as Widening countries. All associated countries with equivalent characteristics in terms of R&I performance (i.e. Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, Georgia, Iceland, Kosovo, Moldova, Montenegro, Morocco, North Macedonia, Serbia, Tunisia, Turkey and Ukraine) and the outermost regions are also included among Widening countries, as described in Annex B of the Work Programme General Annexes.

Budget

The total budget for the Hop-On Facility is 40 million euros and the foreseen budget for each project is between 200 thousand and 500 thousand euros that will be added to the initial budget of the consortium.

The budget increase will be used exclusively for the benefit of the new Widening partner, while the

COO (coordinator) might receive a coordination fee amounting up to the 10% of the increased budget. All costs categories eligible under the ongoing RIA will become eligible for Hop-On activities financing. The expected number of projects that will be funded under the Hop-On is 80.

Admission procedure of a new widening partner to the consortium

Consortium's coordinators play a central role in the process of accession, as they are the ones who must submit the proposal.

N.B. They can do so only after all consortium partners have agreed on the accession of the new partner!

Step-by-step procedure

Call-specific application form is available in the Submission System.

Documents to be submitted: Application part B and the additional mandatory annex titled "Project Grant Agreement" which should include the running GA, part A, part B and the budget table.

1. Selected consortia will be invited to submit in the system an amendment request for accession of a new partner including the modification of the Description of Action and the upgrade of the budget.
2. All the information will have to be added in the customized application form part B, available in the submission system page.
3. An additional mandatory Annex "Project Grant Agreement" is requested to be submitted together with the application part B in the submission system. This Annex must contain the latest GA, part A, part B and budget table of the ongoing HE project that the new partner will join.
4. The proposal should include a detailed description of the profile of the new partner and its role in the existing project. As the main selection criteria will be the added value that the new partner will be able to bring to the existing project, it is very important to detail the WP and tasks that will be assigned to the widening institution in the ongoing projects. In this context, new partners can participate in existing WPs or be assigned new ones.
5. As all consortium partners need to agree on the accession of the new partner, in the application form part B there is a specific Y/N question to be answered by the coordinator. On the system it will also be requested to indicate the acronym and ID of the ongoing HE project.
6. To cover potential arising ethical or security issues, the COO will have to answer a dedicated question in the submission system.

How can widening partners enter a consortium?

In order to join an existing RIA consortium, the widening partners must:

1. Contact their respective NCP to receive assistance in finding a matching consortium.
2. Refer to the list of Hop-On eligible projects on the Commission website, which is updated regularly as new grant agreements are signed.
3. Speak with the coordinators of prospective consortium to be included in the consortium and establish the contribution and added value that the accession can bring to the project.

HOPON Facility insight

- 7 project proposals submitted
- Number of above-threshold proposals: 6
- Number of ineligible proposals: 1
- 2 projects coordinated by Ireland

How can NCPs contribute to the call?

- Encourage coordinators of eligible projects to engage in the Hop-On Facility and welcome new partners. Eligible existing consortia for the Hop On facilities will appear automatically in the digital list on the Commission websites and coordinators will be notified as their consortium is inserted in the list.
 - Raise awareness amongst your national community through the organization of matchmaking events.
 - Liaise with NCPs working on Pillar II and EIC to raise awareness for the Hop-On Facility and encourage engagement of widening partners and consortia.
-
- 1 – by Sweden
 - 1 – by Spain
 - 1 – by Germany
 - 1 – by Italy

Additional information:

- 1 project is ineligible, because, according to HE Work Programme eligibility conditions, only ongoing RIA projects without yet participants from Widening countries are eligible for the HopOn Facility call)
- Number of participants in retained for funding proposals: 6
- Number of participants from Higher or secondary education in retained for funding proposals: 7
- Number of participants from Research organizations in retained for funding proposals: 3
- Number of participants from Private for profit organizations (excl. education) in retained for funding proposals: 0
- Number of participants from Public body (excl. research and education) in retained for funding proposals: 0
- Number of participants from Other type of organization in retained for funding proposals: 2
- Number of SMEs in retained for funding proposals: 0
- Number of coordinators in retained proposals: 1 female, 5 male
- Recommended EU contribution in retained for funding proposals: 2 875 808,00 €

The evaluation of proposals for this call was carried out by 16 experts:

- 10 female and 6 male;
- 13 from EU member states (8 female, 5 male), 2 from associated countries (2 female), 1 from third countries (1 male).

ERA Chairs

ERA Chairs focus on institutional changes and increasing research capacity. They support universities or research organizations from eligible countries to attract and maintain high quality human resources and help excellent scientists and their teams to become game changers in their field.

With this document, we aim to provide an overview of the important aspects that the evaluators indicated through the evaluation procedure performed for the ERA Chairs Call for Proposals

in Horizon Europe Topic Identifier: HORIZON-WIDERA-2022-TALENTS-01. In parallel, we provide a more in-depth analysis of the main comments included in the attached document, as these were extracted randomly from several project proposals approved for funding. Both the attached document and the brief analysis provided below are structured around the three main evaluation criteria. We summarize the main observations resulted from analyzing ESRs randomly, as follows:

Excellence – The evaluators considered well-chosen objectives that are clearly stated, well explained, verifiable as well as highly pertinent to the work programme and fully aligned with the call topic. In some cases the objectives are linked to measurable and achievable yet ambitious key performance indicators (KPIs) and with appropriate actions provided for implementation in the work plan. Research data management and the management of other research outputs are adequately described and clearly in line with FAIR (Findable, Accessible, Interoperable, Reusable) principles. The Open Science Practices

are explicitly accommodated by the planned work and delivery of the objectives, implemented as an integral part of the proposed methodology, in relation to the proposal activities on data management and sharing. The proposed actions will help for reducing the gender gap in the specific fields of research of the proposals, with gender-sensitive recruiting policies. The quality of the proposed coordination and support measures is excellent with the interdisciplinary character of the proposed collaborative research being of particular merit.

Impact - The pathways to achieve the expected outcomes on system and organization level are credible and very well addressed in the proposals, with the scale and significance appropriately demonstrated through the provided KPIs. At the organizational level, especially at the institutional changes and improvement of human resources, the pathways to reach the expected outcomes and impacts are adequately evidenced. Potential

barriers and obstacles to expected impacts achievement have been properly identified. Mitigation measures as a response to some obstacles have been included in the proposals. The potential barriers arising from factors beyond the scope and duration of the projects are identified and sufficiently discussed. The proposed dissemination activities are adequate for the actions and are proportionate to the scale

of the actions. Different valuable communication activities are proposed. Effective qualitative and quantitative KPIs to measure the effectiveness of both dissemination and communication activities are clearly provided. Valuable exploitations

actions are foreseen as well. The approach to the communication, dissemination and exploitation strategy is built on previous EU research findings and best practice guidance.

Implementation – Most of the work plans are very well structured and outlined with sufficiently well-defined Work Package objectives that are further broken down into individual tasks, properly reflecting the expected outcomes of the actions. There are comprehensive lists of deliverables and milestones which are sufficient in number and well planned throughout the duration of the projects, without overloading the progress monitoring activities. A positive aspect in some cases is that all deliverables will be of public access. The proposed deliverables fit well into the work plans and milestones are calibrated and linked to plausible means of verification. The capacity of the hosting institutions and the ERA Chair holders is very well presented in terms of research

capacity as well as financial and organizational aspects. The proposed ERA Chairs are excellent candidates with an appropriate track record and expertise to carry out the projects. Both the hosting institutions and the ERA Chair holders demonstrate existing resources to provide and then develop the critical infrastructures to carry out the projects' activities. The host institution and the ERA Chair often complement each other very well, where the former providing the critical infrastructure while the latter, and the necessary expertise. Solid risk assessment and mitigation strategy plans are presented with interpretations of both the likeliness that risks will occur and the impact that risks may have. The proposed mitigation measures are relevant for most contingencies.

Following the right-to-react ('rebuttal') process for the evaluation of this call the evaluation committee received and examined the additional information provided via the rebuttal procedure. In some cases the information was found to be relevant to the specific issues raised by the evaluators and has been duly taken into account during the discussion

of the evaluation committee. In other cases the received and examined additional information provided via the rebuttal procedure was found by the evaluation committee to alter or expand the original proposal, and therefore was not considered.

Below a summary list of the main documents related to the particular Call for Proposals and for which the NCPs should be aware of, is provided as start-up guidance:

Call documents:

- Standard application form – call-specific application form is available in the Submission System
- Standard application form (HE CSA)
- Standard evaluation form – will be used with the necessary adaptations

- Standard evaluation form (HE CSA)
- MGA
- HE General MGA v1.0
- Call-specific instructions
- Essential Information for Clinical Studies

The rebuttal mechanism (The Right to React Report) is pilot in the 2022 ERA Chairs call.

<https://webgate.ec.europa.eu/funding-tenders-opportunities/display/IT/Right+to+React+Report>

Additional documents:

- HE Main Work Programme 2021–2022 – 1. General Introduction
 - HE Main Work Programme 2021–2022 – 11. Widening participation and strengthening the European Research Area
 - HE Main Work Programme 2021–2022 – 12. Missions
 - HE Main Work Programme 2021–2022 – 13. General Annexes
 - HE Programme Guide
 - HE Programme and Rules for Participation Regulation 2021/695
 - HE Specific Programme Decision 2021/764
 - EU Financial Regulation
 - Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment
 - EU Grants AGA – Annotated Model Grant Agreement
 - Funding & Tenders Portal Online Manual
 - Funding & Tenders Portal Terms and Conditions
 - Funding & Tenders Portal Privacy Statement
 - FAQs provided by (1) EC and (2) NCP_WIDERA.NET Project
-

Additional information:

- 5 projects in reserve list
- 17 projects within the threshold (the lowest 10 points) but below available budget
- 34 below-threshold proposals
- 2 projects are ineligible because they fail to comply with the work programme for ERA Chairs and the participation agreement
- Number of participants in retained for funding proposals: 38 (9 female, 29 male)
- Number of participants from Higher or secondary education in retained for funding proposals: 22
- Number of participants from Research organizations in retained for funding proposals: 14
- Number of participants from Private for profit organizations (excl. education) in retained for funding proposals: 1
- Number of participants from Public body (excl. research and education) in retained for funding proposals: 0

ERA CHAIRS INSIGHT

- 90 project proposals submitted
- Number of above-threshold proposals: 54
- 32 are in the main list for funding (to be invited to grant preparation)
 - 7 projects coordinated by Greece
 - 5 – by Portugal
 - 4 – by Czech Republic
 - 4 – by Bulgaria
 - 2 – by Romania
 - 2 – by Latvia
 - 1 – by France
 - 1 – by Cyprus
 - 1 – by Hungary
 - 1 – by Armenia
 - 1 – by Croatia
 - 1 – by Poland
 - 1 – by Malta
 - 1 – by Spain

- Number of participants from Other type of organization in retained for funding proposals: 1
- Number of SMEs in retained for funding proposals: 2
- Number of coordinators in retained proposals: 8 female, 24 male
- Recommended EU contribution in retained for funding proposals: 79,041,805.00 €

The evaluation of proposals for this call was carried out by 98 experts:

- 41 female and 57 male;
- 85 came from universities and public or private research organizations (35 female and 50 male);
- 10 were from private commercial firms (6 female and 4 male);
- 88 from EU member states (35 female, 53 male), 10 from associated countries (6 female, 4 male).

European Excellence Initiative (EEI)

EEI aims to transform Higher Education Institutions' (HEI) eco-systems at national, regional and European level. This is a new initiative that started with the launch of Horizon Europe and aims to contribute at achieving WIDERA goals in

Destination 1 "Improved access to excellence". As with all WIDERA instruments, coordinator for EEI project has to be from a Widening country and up to 20% of the budget could be allocated for R&I activities.

With this action projects contribute to improving access to excellence through:

- Raising excellence in science and in value creation
- Deepening and geographically inclusive cooperation in alliances of HEIs (e.g. European University Alliances)
- Focusing on Widening countries
- Improving global competitiveness and visibility of European HEIs
- Creating critical mass in key areas (e.g. green transition and Horizon Europe mission areas).

The scope of this action highlights the challenge that is currently present and it provides us with information on what are expected project objectives for this call:

- Raise excellence in science and in knowledge valorization of European HEIs through cooperation
- HEIs as actors of change in research and innovation
- Geographically inclusive cooperation and sharing of good practices to promote institutional changes towards increased attractiveness and access to excellence
- Open to any network. HEIs participating in alliances for specific themes may team up with other partners to pursue other specific themes or objectives
- Develop closer cooperation with economic and industrial partners within local and regional innovation ecosystems to:
- Train academic researchers and support staff in knowledge valorization, entrepreneurship, access to finance, considering the academics' activities in their career assessment
- Create critical R&I mass and pursue specific objectives to accelerate key R&I areas of own choice (e.g. one or more mission).

Besides these objectives, which arise from the scope of the call we can identify more specific objectives that projects need to address:

- Achieving more balanced circulation of talents infrastructures
- Reinforcing the role of HEIs in innovation ecosystems
- Mainstreaming practices and tools for open sharing of knowledge and data
- Reform of the assessment system for research, including career assessment
- Improved links between science and business
- Gender equality, diversity and fostering inclusiveness (GEPs and Policies)
- Acceleration of society's green and digital transition
- Integrated international cooperation with entities in third countries.
- How can these be achieved? Through activities and jointly developed methodology with the partners:
- Sharing R&I capacities including
 - Developing joint interdisciplinary R&I agendas
 - Outreach to and inspiring local/regional innovation ecosystems
 - Strengthening research careers and interdisciplinary upskilling
 - Reforming research assessment
 - Digitization of institutions and partners
 - Engaging with citizens, cities, regions and other non-academic actors
 - Training and capacity building for R&I management including IPR
 - Exchange of academic and non-academic staff for sharing good practices
 - Global outreach and internationalization;
 - Consolidation of cooperation with partners outside EU MS/AC.

ERA Talents

The ERA Talents action aims to boost interoperability of careers and employability of research and innovation talents across sectors, with a centre of gravity in widening countries. Cross-sectoral talent circulation and academia-business collaboration for knowledge transfer is

requiring systematising and structuring efforts.

This call is all about intersectoral mobility: academia –industry cooperation (transfer of knowhow and talent flow from academia to non-academic sector).

Aim and scope:

- Complementary to other Widening Actions and RI Calls;
- Different from ERA Fellowships or MSCA Postdoctoral Fellowships;
- Some similarities to MSCA Staff Exchange;
- Inter-sectoral mobility of R&I Staff
- Knowledge transfer and capacity building
- Increased employability
- Implement a secondment methodology to fulfil the above goals

Consortium composition

Academic sector:

- public or private higher education establishments awarding academic degrees;
- public or private non-profit research organisations for whom one of the main objectives is to pursue research or technological development;
- International European Research Organisations (IERO);

Non-academic sector:

- any socio-economic actor not included in the academic sector and fulfilling the requirements of the Horizon Europe Rules for Participation.
- All fields of future workplaces of researchers and research and innovation talents, from industry to business, independent research infrastructures (e.g. ERICs), government, civil society organisations, cultural institutions, hospitals, etc.

Eligible expenses

Secondments and associated expenditure:

- Administrative costs, training costs, travel and subsistence costs and salaries for seconded staff, and costs associated with dissemination & communication and transfer of knowledge);

Circa 70% of the budget for secondments

- Secondments include salaries;
- Mandatory return phase if the secondment is related to staff members of widening

institutions (excluding salaries, same amount of time as outgoing phase, maximum of 12 months);

- Seconded staff must be actively engaged at least 6 months (FTE) at the sending institution before the (first) period of secondment;
- Secondments cannot be between non-

Widening and must be between different legal entities;

- Duration of 3-24 months for individual staff member (can be split over several stays with one or several beneficiaries);

Secondment methodology

ACADEMIA-INDUSTRY COOPERATION

- Transfer of knowhow and talent flow from academia to non-academic sector;

TRAINING AND LIFELONG LEARNING

- Upskilling and reskilling of researchers and talent flow between sectors (cover needs and demands of non-academic sectors; build R&I support capacity)

RESEARCHER'S ENTREPRENEURSHIP

- Entrepreneurial skills of researchers, as well as commercialization or other valorisation training

Pathways to Synergies

This topic will fund CSA type projects that aim to improve synergies between Horizon Europe & H2020 and ERDF, IPA (instrument for pre-accession assistance), RRF, INTERREG or similar funding instruments; encourage internationalization, valorization and technology uptake; strengthen competitiveness of R&I actors in Widening countries; accelerate knowledge transfer and innovation cycle of beneficiaries from ERDF and H2020 and Horizon Europe; strengthen innovation capacity and competitiveness of less R&I performing regions.

EC expects that this funding instrument will provide support for additional efforts required to setting up the interfaces between two different funding systems and help to overcome the existing mismatches of regional vs. European approach, consortia vs. monobeneficiary, H2020/HE thematic priorities vs. S3.

In addition, this topic will have two pathways (upstream and downstream) that applicants can choose from when developing their project proposals:

Pathway a) upstream should focus on human resources development and internalization. It is expected that projects under this pathways have to achieve the following expected outcomes:

- Joint internationalization strategy for R&I
- HR development strategy
- Increased competitiveness in European and international research funding

- Overcoming barriers of former monobeneficiaries of ERDF
- Transferable skills for R&I staff (knowledge transfer, R&I management and communication)
- Better use of R&I infrastructure funded under ERDF.

Pathway b) downstream should focus on valorization and upscaling of research results towards marketable solutions and identification of up to 3 focus regions to implement downstream synergies. It is expected that projects under this pathways have to achieve the following expected outcomes:

- Valorization of results generated in Horizon Europe or H2020 projects in a regional context

- Improved knowledge transfer and technology uptake in less R&I performing regions
- Exploitation and diffusion of R&I results into the market in line with national/regional S3s
- Preparation of pilots and demonstrators in the chosen R&I domain for funding under ERDF
- Improved intellectual asset management and technology uptake.

PATHWAY a) UPSTREAM (HR and internationalization):

Move formerly single beneficiaries of regional funding programmes out of isolation via cross-border collaboration

Prepare these beneficiaries for successful participation in Horizon Europe calls via strengthening their competitiveness through a customized set of activities

Strategies for HR development including activities such as training and coaching on non-scientific skills such as management of international R&I projects, knowledge transfer, and science communication, suitable study visits and short-term secondments to partners

Communication activities including social media to raise reputation and visibility of the core group

- Early-stage co-operation with NCP organizations is strongly encouraged.
- PATHWAY b) DOWNSTREAM (research and the market):
- Identification of up to 3 focus regions
- Include managing authorities linked to the focus regions and SMEs to act as catalysts for the uptake of R&I results generated under Horizon
- Identification and mapping of specific research results for valorization
- Matchmaking between Horizon beneficiaries and ERDF project partners
- Analysis on how Horizon project outputs and results can be exploited in line with ERDF/RRF or similar programmes
- Workshops with management authorities and local business
- Specification of demonstrators and pilots
- IPR management and technology uptake
- Communication and dissemination activities to raise visibility of EU funded activities in the focus regions
- Preparation of applications for regional calls.

Annex I Pre-screening checklist (short version)

The pre-screening checklist is designed for WIDERA NCPs. It is a part of the comprehensive Pre-proposal Screening Guide and follows the general structure and content of the guide. The checklist is meant to be used as a means of determining whether the NCPs have followed through the Pre-Screening Standards Guide and that they have assessed whether the project proposal/project concept is eligible for the specific Horizon Europe WIDERA call? And whether the

applicant, within the scope of the programme, has addressed the topic, the goals and the sought potential benefit and impact of a project under the specific Call.

In case the filled in checklist indicates that an aspect is not addressed or requires change and improvement, the NCP should refer to the particular chapter of the Pre-Screening Standards Guide addressing the aspect in subject.

Applicability

(Self-) assessment tool

The pre-screening checklist is applicable for pre-screening and (self-) assessment checks in regard to Horizon Europe Widening and ERA actions, components I: Widening participation and spreading excellence, and II: Strengthening the ERA by reforming and enhancing the European Research and Innovation system (Pillar II calls). Before using the (self-) assessment checklist, the NCP should make sure they have read and are familiar with the call-specific subject, scope, goals, applicable eligibility criteria and additional mandatory policies (ex. open science, gender equality, ethics) required for project proposals under the relevant call.

Please answer the series of questions below to check if the project idea, scope and activities are relevant to the [Horizon Europe/Call ID and name; hyperlink to the work programme]. The use of the pre-screening checklist is for information and project preparation purposes only. It does not represent a formal evaluation of the project proposal.

I.	Base frame questions for call specific information:			
	Is the correct application template used?		YES	NO
	Is the application readable, accessible and printable?		YES	NO
	Is the minimum font size 11 points and a minimum of single line spacing applied?		YES	NO
	Accurately specified programme and call		YES	NO
	Accurately defined project name and acronym		YES	NO
	Adequate consortium composition and eligibility, budget, duration		YES	NO
	Is the coordinator from MS/AC?		YES	NO
	Are all participants from MS/AC?		YES	NO
	Clearly defined programme/call topic addressed. Is topic of the application relevant to the call topic?		YES	NO
	Clearly defined the EC policy objectives which the project relates to, within the scope of the call		YES	NO
	The outputs/impact are adequate to work programme		YES	NO
	Is the application complete, e.g. does it consist of all parts, mandatory annexes and supporting documents?		YES	NO
	Is the 30 pages limit for the part B of the application kept?		YES	NO
	Have all project participants elaborated a gender equality plan (GEP)?		YES	NO
	Does the budget comply with the funding limits of the EC contribution requested?		YES	NO
	NB: One or more “no” answers to the Base frame questions for call specific information indicate the project proposal requires rework. In such case the NCP should not proceed to part II of the checklist - Detailed questions. The NCP could refer to the Pre-Screening Standards Guide and instruct the applicant on the recommended approach to correcting the project proposal.			
II.	Detailed questions			
1.	Excellence		YES	NO
	Clarity and pertinence of the project’s objectives which could be decoding as:			
	Are the project ´s objectives clear and pertinent to the topic and to proposed work packages?		YES	NO

I.	Quality of the proposed coordination and/or support measures including soundness of methodology which could be decoding following:			
	Is the methodology (e.g. concepts, models and assumptions) clear and sound?		YES	NO
	Is data management properly addressed and in line with the FAIR principles (findable, accessible, interoperable, reusable)?		YES	NO
	Is the principle of Open Science properly described in the proposal?		YES	NO
	Relevant policies addressed:			
	Gender dimension of the proposal		YES	NO
	Open science - How to evaluate Open Science in Horizon Europe proposals		YES	NO
	SSH - How to evaluate Social Sciences and Humanities in Horizon Europe proposals		YES	NO
	Ethics - How to evaluate Ethics in Horizon Europe proposals		YES	NO
	2. Impact			
	The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:			
	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 which could be decoding as:			
	Does the project contribute towards the expected outcomes of the topic?		YES	NO
	Suitability and quality of the measures to maximize expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities which could be decoding as:			
	Are the proposed dissemination, exploitation and communication measures suitable for the project? (All measures should be proportionate to the scale of the project and should contain concrete actions to be implemented both during the project and during the time of its sustainability)		YES	NO
	Are the target groups for these measures identified?		YES	NO
	Relevant thematic aspect considered:			
	Identification of potential barriers and risks to the expected outcomes and impact and their management;		YES	NO
	Does the application feature an intellectual property rights (IPR) strategy?		YES	NO

3.	Quality and efficiency of the implementation			
	The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:		YES	NO
	Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall which could be decoding as:		YES	NO
	Are the resources allocated to the work packages (WP) in line with their objectives and deliverables?		YES	NO
	Are critical risks, relating to the project implementation, identified and proper risk mitigation measures proposed?		YES	NO
	Is dissemination and exploitation plan incl. communication activities one of the proposed deliverables?		YES	NO
	Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise which can be decoded as follow:			
	Are the roles of consortium participants and their contribution to the project 's objectives well described?		YES	NO
	Is necessity of subcontracting described and justified in detail?		YES	NO

Annex II Pre-screening checklist (extensive version)

Base frame questions for call specific information:				
Is the correct application template used?		YES		NO
Is the application readable, accessible and printable?		YES		NO
Is the minimum font size 11 points and a minimum of single line spacing applied?		YES		NO
Accurately specified programme and call		YES		NO
Accurately defined project name and acronym		YES		NO
Adequate consortium composition and eligibility, budget, duration		YES		NO
Is the coordinator from MS/AC?		YES		NO
Are all participants from MS/AC?				
Clearly defined programme/call topic addressed. Is topic of the application relevant to the call topic?		YES		NO
Clearly defined which EC policy objectives the project relates to, within the scope of the call.		YES		NO
The outputs/impact are adequate to work programme.		YES		NO
Is the application complete, e.g. does it consist of all parts, mandatory annexes and supporting documents?		YES		NO
Is the 30 pages limit for the part B of the application kept?		YES		NO
Have all project participants elaborated a gender equality plan (GEP)?		YES		NO
Does the budget comply with the funding limits of the EC contribution requested?		YES		NO
<p>NB: One or more “no” answers to the Base frame questions for call specific information indicate the project proposal requires rework. In such case the NCP should not proceed to part II of the checklist - Detailed questions. The NCP could refer to the Pre-Screening Standards Guide and instruct the applicant on the recommended approach to correcting the project proposal.</p>				

I.	Detailed questions				
1.	Excellence				
	Clarity and pertinence of the project's objectives which could be decoding as:				
	Are the project 's objectives clear and pertinent to the topic and to proposed work packages?		YES		NO
	Does the proposed concept/idea go beyond the state-of-the-art?		YES		NO
	Are the project 's objectives measurable and verifiable?		YES		NO
	Are the project 's objectives specific, measurable, achievable, relevant, time-bound (SMART) within the duration of the project?		YES		NO
	Quality of the proposed coordination and/or support measures including soundness of methodology which could be decoding following:				
	Is the methodology (e.g. concepts, models and assumptions) clear and sound?		YES		NO
	Is it clear how expertise and methods from different disciplines will be brought together and integrated in pursuit of the objectives?		YES		NO
	For topics indicating the need for the integration of social sciences and humanities (SSH) - is their role addressed properly?		YES		NO
	Is data management properly addressed and in line with the FAIR principles (findable, accessible, interoperable, reusable)?		YES		NO
	Is the principle of Open Science properly described in the proposal?		YES		NO
	Relevant policies addressed:				
	Open science - How to evaluate Open Science in Horizon Europe proposals		YES		NO
	SSH - How to evaluate Social Sciences and Humanities in Horizon Europe proposals		YES		NO
	Ethics - How to evaluate Ethics in Horizon Europe proposals		YES		NO

I.	Detailed questions			
1.	Impact			
	The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:			
	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 which could be decoded as:			
	Are the project 's pathways to achieve the expected impact credible?		YES	NO
	Are the scale and significance of the project 's contribution to? the expected outcomes and impacts estimated and quantified? Incl. baselines, benchmarks and assumptions used for those estimates?		YES	NO
	Is the contribution of the project towards the wider impact (scientific, economic, technological, societal and environmental) in the longer term as specified in the respective destination of the WP credible?		YES	NO
	Does the project contribute towards the expected outcomes of the topic?		YES	NO
	Does short/medium-term impact (expected outcomes) logically interlink with project 's objectives and proposed WPs/tasks?		YES	NO
	Does the project credibly contribute towards the wider, long term, impacts (scientific, economic, technological, societal and environmental) as specified in the respective destination of the WP?		YES	NO
	Are potential barriers and risks to the expected outcomes and impacts identified?		YES	NO
	Is their (barriers and risks) management/mitigation sufficiently described?		YES	NO
	Is the scale and significance of the project 's contribution to the expected outcomes and impacts estimated and quantified? Incl. baselines, benchmarks and assumptions used for those estimates?		YES	NO
	Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities which could be decoding as:			
	Are the proposed dissemination, exploitation and communication measures suitable for the project? (All measures should be proportionate to the scale of the project and should contain concrete actions to be implemented both during the project and during the time of its sustainability)		YES	NO
	Are the target groups for these measures identified?		YES	NO

Relevant thematic aspect considered:				
	Identification of potential barriers and risks to the expected outcomes and impact and their management;		YES	NO
	IPR strategy - How to evaluate the Strategy for Intellectual Property Management in Horizon Europe proposals; Does the application feature an intellectual property rights (IPR) strategy?		YES	NO
	Is the IPR strategy properly outlined and suitable to support exploitation of results?		YES	NO
	If exploitation is expected primarily in non-associated third countries, is it properly justified how that exploitation is still in the EU interest?		YES	NO
	Are the project 's pathways to achieve the expected impact credible?		YES	NO
	In case of using artificial intelligence (AI), is the technical robustness of the AI system proposed well described?		YES	NO

² Scale refers to how widespread the outcomes and impacts are likely to be.

³ Significance refers to the importance or value of those benefits.

3.	Quality and efficiency of the implementation			
	The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:			
	Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall which could be decoding as:			
	Is the work plan effective and of good quality?		YES	NO
	Does it follow a logical structure?		YES	NO
	Are the resources allocated to the work packages (WP) in line with the objectives and deliverables?		YES	NO
	Does it include quantified information so that progress can be monitored?		YES	NO
	Does the application consist of Gantt and Pert diagrams?		YES	NO
	Are critical risks, relating to the project implementation, identified and proper risk mitigation measures proposed?		YES	NO
	Is dissemination and exploitation plan incl. communication activities one of the proposed deliverables?		YES	NO
	Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise which can be decoded as follow:			
	Are person/months as well as other capacities assigned to work packages reasonable?		YES	NO
	Are the roles of consortium participants and their contribution to the project 's objectives well described?			
	Does the consortium match the project 's objectives and bring together the necessary disciplinary and inter-disciplinary knowledge?		YES	NO
	Do project partners have access to critical infrastructure needed to carry out the project activities?		YES	NO
	Does each of them have a valid role and adequate resources in the project to fulfil that role (so they have sufficient operational capacity)?		YES	NO
	Are participants complementing one another and cover the value chain, where appropriate?		YES	NO
	In what way does each of them contribute to the project?		YES	NO
	Are critical risks, relating to the project implementation, identified and proper risk mitigation measures proposed?		YES	NO
	For topics flagged as SSH relevant, does the consortium include expertise in social sciences and humanities?		YES	NO
	Are 'purchase costs' items (travel and subsistence, equipment and other goods, works and services) justified in detail?		YES	NO
	Is necessity of subcontracting described and justified in detail?		YES	NO

Annex III Eligibility requirements

	Destination	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
TEAMING	Improved access to excellence	Main beneficiary + 1 or 2 strategic advanced partners	Single center of excellence to be modernized or created, relevant at national scale	Develop light houses and role models to stimulate reforms of national R&I system, increase level of excellence of national R&I system, and mobilize new investments.	The conditions are described in General Annex B. Coordinator role limited to legal entities established in Widening countries. Project must involve at least two beneficiaries: a) the main applicant organization (the coordinator) which will be a university or a research organization, a national or regional authority or a research funding agency, and b) at least one leading university or research organization established in another Member State or Associated Country as an advanced partner. Complementary funding (e.g. national and/ or regional funding, European funding, such as from Cohesion policy programmes, or private sources) is required in at least equal sum of the total requested Horizon Europe contribution (HE WP 2023-2024, p. 13-14).
TWINNING BOTTOM-UP	Improved access to excellence	Main beneficiary and focused network of partnering organizations	Individual institutions and small network of advanced partnering institutions. Institutional scale with European outreach institutions and small network of advanced partnering institutions. Institutional scale with European outreach		The conditions are described in General Annex B. Participation as coordinators to the call is limited to legal entities established in Widening countries. At least 70% of the budget for research activities must be allocated to the coordinator (HE WP 2023-2024, p. 20-21).

	Destination	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
TWINNING GREEN DEAL	Improved access to excellence	Main beneficiary and focused network of partnering organizations	Individual institutions and small network of advanced partnering institutions. Institutional scale with European outreach	Develop excellence in a chosen R&I domain for the main beneficiary with the help of twinning partners, increase visibility of main beneficiary and upskill its staff. Focus should be on a defined area of research/ innovation directly linked to at least one of the actions listed in the European Green Deal strategy: climate, environment and oceans, energy, transport, agriculture, finance and regional development, industry, R&I.	The conditions are described in General Annex B. Participation as coordinators to the call is limited to legal entities established in Widening countries. At least 70% of the budget for research activities must be allocated to the coordinator (HE WP 2023-2024, p. 20-21).

	Destination	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
ERA TALENTS	Attracting and mobilizing the best talents	Consortium of academic and non-academic partners	Researchers, innovators, and other R&I talents (focus on early career stage staff)	Boost interoperability of careers and employability of research and innovation talents across sectors, with a center of gravity in widening countries.	The conditions are described in General Annex B. Participation as coordinators to the call is limited to legal entities established in Widening countries (HE WP 2023-2024, p. 69-70).
ERA CHAIRS	Attracting and mobilizing the best talents	Mono-beneficiary host organization with optional single partner organization	Excellent individuals and their teams, institutional scale	Excellent scientists and their teams to become game changers at institutional level, develop new research strands and raise level of excellence.	The conditions are described in General Annex B. The call is limited to legal entities established in Widening countries (HE WP 2023-2024, p. 60).
ERA FELLOWSHIPS	Attracting and mobilizing the best talents	Joint application, researcher together with a beneficiary in the academic or non-academic sector located in a Widening Country	Open to researchers of any nationality who wish to engage in R&I projects by either coming to Europe from any country in the world or moving within Europe to a Widening Country	Increased set of research and transferable skills and competences, leading to improved employability and career prospects of fellows within academia and beyond. Increased global attractiveness, visibility and reputation of the participating organization(s).	The conditions are described in General Annex B. The proposals submitted under the ERA Fellowships must fulfil all the admissibility and eligibility conditions of the MSCA Postdoctoral Fellowships 2021 and pass all the thresholds for that call. ERA Fellowships should take place in a Widening Country (HE WP 2023-2024, p. 57-59).

	Destination	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
EXCELLENCE HUBS	Improved access to excellence	Group of 2 or 3 place based innovation ecosystems based on the quadruple helix approach	Research institutions, firms, local/regional government, societal actors, local regional scale with cross border dimension	Foster innovation excellence in place based (local/regional) innovation ecosystems, improve science business linkages, regional dimension of widening, and bottom-up approach.	The conditions are described in General Annex B. Participation as coordinators to the call is limited to legal entities established in Widening countries. Consortia must include at least two different place based R&I ecosystems in at least two different countries eligible to host the coordinator under the widening part of Horizon Europe. Quadruple helix approach needs to be presented in the proposal either by one or more umbrella organizations (e.g. clusters) or representative individual entities representing each of the four categories (academic, business, public, civil) (HE WP 2023-2024, p. 46-47).
EUROPEAN EXCELLENCE INITIATIVE (EEI)	Improved access to excellence	Network of European Universities, co-ordinates by university from widening country	European Universities alliances or similar networks of universities at European level	Mainstream excellence in science and in value creation, through integrated cooperation of universities;	The conditions are described in General Annex B. Participation as coordinators to the call is limited to legal entities established in Widening countries. Entities who already benefit from the European Universities initiative pilot funding of Horizon 2020 can participate, but are excluded from receiving funding through this action (HE WP 2023-2024, p. 29-30).

Annex IV Useful links (EC, different networks)

- [HORIZON EUROPE](#)
- [REFERENCE DOCUMENTS HE](#)
- [HORIZON EUROPE STRATEGIC PLAN 2021 - 2024](#)
- [HORIZON EUROPE WIDENING PARTICIPATION AND SPREADING EXCELLENCE](#)
- [HORIZON EUROPE REFORMING AND ENHANCING THE EUROPEAN RESEARCH AND INNOVATION SYSTEM](#)
- [HORIZON EUROPE PROGRAMME GUIDE](#)
- [HE WP 2021-2022 WIDENING PARTICIPATION AND STRENGTHENING THE EUROPEAN RESEARCH AREA](#)
- [LIST OF PARTICIPATING COUNTRIES IN HE](#)
- [COMPOSITE INDICATORS OF RESEARCH EXCELLENCE](#)
- [HORIZON EUROPE NCP PORTAL](#)
- [HORIZON EUROPE GLOSSARY: A SIMPLE GUIDANCE THROUGH HEU TERMINOLOGY](#)
- [LUMP SUM FUNDING](#) (May 19th 2022)
- [Lump sum Model Grant Agreement, pre-draft version, 01.06.2021.](#)
- [WIDERA INFO DAY](#) (April 27th 2022)
- [ERA and WIDENING INFO DAY](#) (July 9th 2021)
- [EUROPEAN RESEARCH AREA POLICY AGENDA](#) (2022 – 2024)

Annex V Analysis of Twinning Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2021-ACCESS-03-01

The following table is structured around the three main evaluation criteria: Excellence, Impact and Implementation. Exact evaluators' comments have been grouped, according to the main components addressed under the evaluation procedure for each

of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted randomly, from various proposals covering all scoring ranges.

Evaluators' Comments	
Excellence	
Objectives	<p>'Objectives are clear, well-formulated and fully pertinent to the Work Program/ well-presented, measurable, verifiable and achievable '.</p> <p>Overall Score: 14.5/15 (Score on Excellence criterion: 4.5/5)</p> <p>'Objectives are realistic and in line with the overall ambition'.</p> <p>Overall Score: 8.5/15 (Score on excellence: 3.5/5)</p> <p>'Overall, the proposed objectives are pertinent to the call topic as described in the Work Programme. However, for some of the objectives the description is not always sufficiently clear to determine whether they can be realistically achieved'.</p> <p>Overall Score: 6/15 (Score on excellence: 1.5/5)</p> <p>'The objective of strengthening the research management and administration skills of the coordinating institution is fairly described as aiming at the transfer of knowledge and skills from the non-widening to the widening consortium participating organizations''.</p> <p>Overall Score: 5.5/15 (Score on excellence: 2.5/5)</p> <p>'The first three objectives are described in detail, however mostly in technical terms'.</p> <p>Overall Score: 3.5/15 (Score on excellence: 1.5/5)</p>

Evaluators' Comments	
Excellence	
Data Management	<p>'The project's data management follows the FAIR principles and is well described, including the consideration of ethical concerns'. Overall Score: 14.5/15 (Score on Excellence: 4.5/5)</p> <p>'The project is fully aligned with the FAIR principles and proposes very good solutions in this direction'. Overall Score: 12/15 (Score on Excellence: 4/5)</p> <p>'It conforms generally to the FAIR principles, but it does not present a fully detailed set of the relevant technical and administrative approaches'. Overall Score: 5.5/15 (Score on Excellence: 2.5/5)</p>
Open science practices	<p>'Open science practices are well addressed and adequately cover published materials and other data generated by the proposed project'. Overall Score: 14/15 (Score on Excellence: 4.5/5)</p> <p>'Open access publications, granting of research data and their metadata, using established open-source protocols are among the many actions being considered'. Overall Score: 11.5/15 (Score on excellence: 4.5/5)</p> <p>'Good description of its use of Open Science practices'. Overall Score: 8.5/15 (Score on Excellence: 3.5/5)</p> <p>'Open Science practices are addressed in the application only briefly and on a very generic level. The types of data that will be generated in the project are described in detail'. Overall Score: 7.5/15 (Score on Excellence: 2.5/5)</p>
Gender equality	<p>'The gender equality in this proposal is exceptional. All partners in the consortium are led by female scientists. All partners have a gender equality plan'. Overall Score: 11.5/15 (Score on Excellence: 4.5/5)</p> <p>'However, gender equality aspects are addressed only generically, without sufficiently clear, specific actions'. Overall Score: 3.5/15 (Score on Excellence: 1.5/5)</p>

Evaluators' Comments	
Excellence	
CSA/Twinning Activities	<p>'The proposal outlines four objectives, three of which are research objectives and only one is related to CSA specific actions'.</p> <p>Overall Score: 3.5/15 (Score on Excellence: 1.5/5)</p>
	<p>'The Twinning activities (i.e. staff exchanges; expert visits; virtual training etc.) and actions on strengthening the research management and administration skills of the coordinating institution are not adequately described'.</p> <p>Overall Score: 3.5/15 (Score on Excellence: 1.5/5)</p>
Evaluators' Comments	
Impact	
Pathways towards Impact	<p>'The plan outlines a series of objectives to maximize impact, provided with foreseen target audiences and a realistic timetable'.</p> <p>Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'Outcomes, impact and strategy to achieve it are measurable and credible. The proposal's contribution to the expected outcomes and impacts has the potential to be very large and significant'.</p> <p>Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'Specific preliminary action plans to meet the short, medium and long-term impacts of the expected outcomes have been excellently defined and well described, namely the targeted topics for the different workshops/trainings defined in accordance with the expertise gap of the widening institutes' team'.</p> <p>Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'The proposal will have significant impacts, aligned with the expected outcome of the Work Programme, and with credible pathways'.</p> <p>Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'The pathways to achieve some of the expected outcomes and impacts specified in the Work Programme are discussed, but not all in sufficient detail and some of them are not entirely convincing'.</p> <p>Overall Score: 3.5/15 (Score on Impact: 1/5)</p>
	<p>'There is no evidence of specific pathways to achieve enhanced networking activities between the consortium members and transfer of knowledge from the two Member States / Associated Countries to the two research institutions of the Widening country'.</p> <p>Overall Score: 3.5/15 (Score on Impact: 1/5)</p>

Evaluators' Comments	
Impact	
Potential Barriers and mitigation Measures	<p>'Obstacles and barriers to achieving the expected outcomes and impacts (such as political/legal issues, economic factors of social aspects) are very well addressed'. Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'The potential barriers that may hinder the achievement of desired outcomes and impacts are well identified and mitigating measures likely to be effective are proposed'. Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'The potential barriers and their mitigation measures listed in the proposal are not sufficiently comprehensive and not thoroughly convincing'. Overall Score: 9/15 (Score on Impact: 2.5/5)</p>
	<p>'The analysis of potential barriers is fair, although not entirely exhaustive. The proposed actions to overcome these barriers are not sufficiently convincing, such as those concerning the barriers associated with X activity in the Project'. Overall Score: 5.5/15 (Score on Impact: 2/5)</p>
Dissemination, exploitation and communication activities	<p>'Knowledge protection by patents and IPR management are well elaborated'. Overall Score: 14/15 (Score on Impact: 5/5)</p>
	<p>'The tools for communication activities are appropriate for this type of action. The proposed measures to disseminate the outcomes of the project are appropriate and described in sufficient detail'. Overall Score: 11.5/15 (Score on Impact: 2.5/5)</p>
	<p>'Communication to wider audiences is only superficially addressed, lacking precise and well-tailored measures'. Overall Score: 9/15 (Score on Impact: 2.5/5)</p>
	<p>'The target audiences, for the dissemination of the potential results of the proposed project, are defined in a way that prioritizes the engagement of participants in the region. Nevertheless, the proposal does not sufficiently address the presentation of outcomes to international peer networks of scholars and other researchers'. Overall Score: 5.5/15 (Score on Impact: 2/5)</p>
	<p>'The exploitation and IPR aspects are briefly discussed without sufficient specific details'. Overall score: 3.5/15 (Score on Impact: 1/5)</p>
	<p>'Exploitation is inadequately addressed and IP protection is addressed in a very superficial and general way, lacking details on how it will be implemented'. Overall score: 6/15 (Score on Impact: 2/5)</p>

Evaluators' Comments	
Implementation	
Work Plan	<p>'The work plan is clear, well-structured and of high quality. It is presented in a coherent and transparent manner'.</p> <p>Overall Score: 14.5/15 (Score on Implementation: 5/5)</p> <p>'The individual work packages are precisely described and include the necessary information concerning the objectives, work description, specific tasks, deliverables, due dates and responsibilities of project partners'.</p> <p>Overall Score: 14.5/15 (Score on Implementation: 5/5)</p> <p>'The description of the work packages and the Gantt chart are clear and convincing and include an extensive set of deliverables and milestones'.</p> <p>Overall Score: 11.5/15 (Score on Implementation: 3.5/5)</p> <p>'PERT Chart illustrates very well the interrelationship between individual work packages as well as the workflow. Provided Gantt chart allows to easily follow the progress of the individual work packages and tasks'.</p> <p>Overall Score: 7.5/15 (Score on Implementation: 2.5/5)</p> <p>'Each work package is briefly and generally described and the planned activities cannot be clearly seen from them'.</p> <p>Overall Score: 6/15 (Score on Implementation: 2/5)</p> <p>'The structure of the work plan is presented in too generic terms; therefore, its quality and effectiveness cannot be fully and appropriately assessed'.</p> <p>Overall Score: 5.5/15 (Score on Implementation: 1.5/5)</p> <p>'The proposal is missing a WP (or task) there where specific activities to improve management and administration skills are presented'. Overall Score: 3.5/15 (Score on Implementation: 1/5)</p> <p>'The work plan structure is generally satisfactory. The work plan is unbalanced since the focus on research activities is considered too high at the expense of the coordination and support activities, which are insufficient'.</p> <p>Overall Score: 3.5/15 (Score on Implementation: 1/5)</p>
Milestones/ Deliverables	<p>'Nevertheless, a good number of milestones is indicated, with a positioning along the project's duration coherent with effective project monitoring'.</p> <p>Overall Score: 14/15 (Score on Implementation: 4/5)</p> <p>'Milestones and deliverable are presented in the proposal, however they do not appear to include any expected activities to the call, such as workshops etc'.</p> <p>Overall Score: 6/15 (Score on Implementation: 2/5)</p>

Annex VI Analysis of Excellence Hubs Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2022-ACCESS-04-01

The following table is structured around the three main evaluation criteria: Excellence, Impact and Implementation. Exact evaluators' comments have been grouped, according to the main components addressed under the evaluation procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from the 10 project proposals approved for funding.

Evaluators' Comments	
Excellence	
Objectives	<ul style="list-style-type: none"> → The objectives of the proposal are very clear. → The objectives are also pertinent to the Work Programme and address very well the need for place-based innovation ecosystems. → The objectives are very pertinent with the call topic, and they are fully aligned with EU, national and regional policy objectives respectively. → The specific objectives are very clearly stated, measurable, verifiable, ambitious and realistically achievable. → The objectives are properly focused on the long term. → The general and specific objectives are clear, measurable and pertinent to the Work Programme. → The proposed project objectives are very clearly presented and very well structured. → The proposal is firmly aligned with the key objectives of the Widening Component of the Work Programme. → The connection between the project objectives and the scope of the call is excellently described. → The objectives are very well-formulated and fully in line with the call. Each of them is underpinned with key performance indicators which are clearly quantified, credibly related to the objectives, and therefore measurable. → The proposal expresses clear, verifiable and realistically achievable objectives to be addressed at multiple levels.

Evaluators' Comments	
Excellence	
Data Management	<ul style="list-style-type: none"> → Research data management and the management of other research outputs are in line with FAIR principles. → The management of research data and of other research outputs will be fully in line with the FAIR principles. → Research data management and management of other research outputs is in line with FAIR guidelines. → The management of research outputs fits the FAIR principles. → The proposal convincingly demonstrates that the research data management will be in line with the FAIR principles. → The project will be fully compliant to FAIR principles. → Data management procedures and protocols are well catered for and will be organized according to FAIR principles. → Data Management Plans will be developed for each research task, as well as for the entire project, and data stored in a suitable repository.
Open science practices	<ul style="list-style-type: none"> → The use of open science practices is suitable and well aligned with the project's objectives. → The proposal states its clear commitment to the adoption of Open Science (OS) practices in relation to the expected work and delivery of the objectives. → OS practices are very appropriately implemented as an integral part of the proposed methodology. → Open science practices are well considered, taking into account open sharing of results and ensuring their quality and transparency. → Open Science approaches are adequately presented, with some recommended activities such as involving citizens, civil society and end users in the co-creation of R&I agendas and contents. → Open Science practices is duly detailed with open sharing research, open access publications and some open software/tools. → Open Science practices are well addressed. → The proposal appropriately supports an open access policy for scientific publications and will take all necessary actions to ensure free access to peer-reviewed articles resulting from the project. → Open science is appropriately approached. The open science practices and the data management meet the requirements of the call, using freely accessible Open Access Repositories. → Furthermore, open science practices will be implemented as an integral part of the methodology. → Open Science practices are comprehensively described and are fully suited to the delivery of the objectives. Strategies for open science practices for different forms of results are differentiated and described in detail.

Evaluators' Comments	
Excellence	
Gender equality	<ul style="list-style-type: none"> → Despite the fact that gender is not an issue for this proposal the gender equality within the consortium is well intended. → Gender dimensions along with sensitivity to age, ethnicity, socioeconomic and other social factors are integrated in the proposal. Three gendered-innovations are presented, and these are in line with the main requirements of the call.
CSA/Twinning Activities	<ul style="list-style-type: none"> → The proposed coordination and support measures are of very good quality. → The quality of proposed coordination and support measures is excellent and is very clearly depicted. → Measures for staff exchanges, twinning of activities between ecosystems, skills development for research and innovation management and citizen engagement represent an added value. → The coordination and support measures for scaling up and intensifying the collaboration between the two hubs are effective. → The proposed coordination and support measures are of very high quality and very appropriate. → The proposed coordination and support measures are sufficiently outlined.

Evaluators' Comments	
Impact	
Pathways towards Impact	<ul style="list-style-type: none"> → Overall, the proposed pathways to achieve the expected outcomes and impacts specified in the work programme are highly credible and convincing. → The pathways to achieve the outcomes are comprehensive and very credible. → The pathways to achieve the outcomes of the project in the medium term are credible. → The pathways described to achieve the expected outcomes are credible, well developed and progress beyond the state-of-the-art. → The pathways to achieve the project outcomes and impacts identified in the Work Programme are highly credible and excellently discussed through scientific, social and economic impacts which have been convincingly demonstrated at national and international levels. → Pathways to achieve the expected outcomes and impacts specified in the WP are clearly presented and credible. The pathways comprise an innovative mix of traditional and novel approaches. → The pathways to achieve the project outcomes and impacts identified in the Work Programme are highly credible and well discussed.

Potential Barriers and mitigation Measures	<ul style="list-style-type: none"> → Potential barriers arising from factors beyond the scope and duration of the project are identified and appropriate mitigation measures are included. → Potential barriers, that may determine whether the desired outcomes and impacts are achieved, are appropriately identified, and appropriate mitigation measures are proposed. → Three main potential barriers to the development of the plan are identified and appropriate mitigation measures are available for two of them. → Moreover, the identified requirements and potential barriers that may affect the achievement of the proposal's outcomes & impacts, and the respective mitigation measures are very well presented and thoroughly discussed and considered. → A number of pertinent potential barriers are identified in the proposal and relevant mitigation measures proposed. → The proposal properly identifies relevant social, political and regulatory, and technical barriers. Mitigation measures proposed are in general convincing. → Potential barriers have been appropriately identified and address technical barriers, regulatory barriers as well as security protection and liability barriers. The mitigation measures for each of the barriers are adequate and pro-active. → The proposal briefly identifies potential barriers to the expected outcomes and the corresponding mitigation measures.
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Evaluators' Comments	
Implementation	
Work Plan	<ul style="list-style-type: none"> → The proposed work plan is of high quality and demonstrates a well structured strategy for implementation. → Work packages are generally well described and are proportionate to the scale and complexity of the proposed project. A well-designed Gantt chart clearly shows what has to be done and when. → The work packages are coherent with the project aims and objectives and are effectively structured and interrelated. → The work plan is effectively developed and the interrelation of the work packages is appropriate. The resources assigned to the work packages are properly allocated to the different types of costs and are aligned with the objectives. → The work plan is comprehensive and robust, containing all the necessary elements for the successful implementation of a high-quality CSA. → The work plan reflects the proposed methodology in an excellent way. → The work plan is very well-structured and well described regarding strategy; R&I projects; action and investment planning in line with the Work Programme. → The work plan is of very good quality, coherently structured and very effective. The Work Packages (WPs) follow a logical structure, have an appropriate timeframe and interconnections between them.

Evaluators' Comments	
Implementation	
Milestones/ Deliverables	<ul style="list-style-type: none"> → The proposed deliverables are well thought out. → Milestones and deliverables are well specified and timed to allow for the effective monitoring of the proposed project's progress. → The work packages are accompanied by many appropriate milestones and deliverables. → The milestones and deliverables of the proposal are very good and appropriately distributed in the time plan in order to provide efficient means for good progress control of the proposed work. → A brief but relevant set of key milestones is presented for the project. → There is a credible set of integrated and coherent work packages and deliverables addressing key activities required for the successful undertaking of the project. → Deliverables and Milestones are coherent with the work in every work package. → The comprehensive list of deliverables and milestones allows for the monitoring of progress. This is excellent.
Capacity of participants and Consortium as a whole	<ul style="list-style-type: none"> → The proposal demonstrates that the consortium as a whole brings together the necessary expertise to implement a project of this scale. → The consortium matches the project's objectives and brings together the necessary disciplinary and interdisciplinary expertise, along with social science and open science experience. → The members of the consortium complement each other and there is a good balance between western European partners that are active in multiple ecosystems and those in the consortium with less experience. → There is very good complementarity of skills and expertise among members of the consortium with very little overlap. → The leaders are well known experts in the field and have high-level skills needed for efficient coordination. The collaborating partners participate actively in the work packages. Each partner has the resources, infrastructure and skills to fulfil their complementary roles and tasks. → Each partner participates actively in the project and is fully engaged, with clearly assigned roles. → All the partners have a clear role to carry out the proposed action. → The consortium as a whole is very well-built/structured and assembles the requisite expertise and disciplinary and inter-disciplinary knowledge for the achievement of the project's objectives. The partners complement each other. The Consortium meets all the requirements for this call topic. → The consortium brings together the necessary disciplinary and inter-disciplinary knowledge, including in the area of business and market strategy, to achieve the commercialization of the services. This is excellent. → It is credible that the partners have the necessary scientific expertise combined with the proper relationships to policy makers. → The consortium partners have very good expertise, solid track records and high degree of complementarity which brings value to the project. → The consortium is a balanced match of research and business communities, policymakers and CSOs/ agencies. → Jointly, the consortium assembles ample expertise to build the excellence hub and tackle the identified thematic problems.

Evaluators' Comments	
Implementation	
Risk Assessment and Mitigation measures	<ul style="list-style-type: none"> → Well considered critical risks relating to project implementation are identified and rated according to their likelihood and severity. Suitable associated mitigation measures are proposed. → Critical risks related to the proposed project implementation are clearly identified and assessed, and appropriate mitigation measure are proposed. → Critical risks related to the implementation and mitigation measures for the non-research components are well considered and acceptable. → The proposal includes a credible list of critical risks for implementation as well as corresponding mitigation measures. → A very credible and well-formulated set of critical risks is presented. A convincing set of mitigation measures is proposed. → Overall, the critical risks for implementation are very well identified and qualified, and appropriate mitigation measures are proposed. The risks are considered in a very structured way and are clearly articulated including scores. → The proposal identifies several potential critical risks, based on their severity and impact, which may adversely affect successful implementation, and presents convincing mitigation measures for all of them.

Conclusion:

The highest total score of the projects is: 15 (Threshold: 10) – 1 project

Total score 14.50 – 1 project

Total score 14.00 – 2 projects

Total score 13.50 – 4 projects

Total score: 13.00 – 2 projects

Criterion 1 - Excellence (Threshold: 3/5.00)

Score: 5 - 6 projects

Score: 4.50 – 4 projects

Criterion 2 - Impact (Threshold: 3/5.00)

Score: 5 – 1 project

Score: 4.50 – 9 projects

Criterion 3 – Implementation (Threshold: 3/5.00)

Score: 5 – 2 projects

Score 4.50 – 4 projects

Score: 4.00 – 4 projects

Annex VII Analysis of ERA Chairs Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2022-TALENTS-01-01

The following table is structured around the three main evaluation criteria: Excellence, Impact and Implementation. Exact evaluators' comments have been grouped, according to the main components addressed under the evaluation procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators' Comments	
Excellence	
Objectives	<ul style="list-style-type: none"> → The project objectives are very well defined and pertinent. Each objective is supported by a measurable set of results (KPIs), allowing its verification. → The proposal is pertinent to the work programme; the main objectives are convincing and clearly articulated. → The well-chosen objectives are clearly stated, measurable, verifiable, and achievable as well as highly pertinent to the work programme and fully aligned with the call topic. → The project's objectives are extremely pertinent to the work program. → The project objectives are clearly stated and fully pertinent to the call topic. → The objectives are measurable, verifiable and achievable. → The project objectives are well aligned with the Work Programme. → The objectives of the action are achievable in view of the described methodology and the background of the ERA Chair holder. → The objectives of the action are not always presented in a measurable way in terms of verifiable targets. → The general aim of enhance the institution through the establishment of an ERA Chair is fully justified. The specific scientific objectives are clearly aligned with institutional and societal objectives and pertinent to the work programme. → The project objectives are pertinent to the ERA Chair Work Programme. → The objectives of the proposal are provided in a rather generic way, without clarifying how these objectives are linked with the WPs. → The objectives are in their larger part clear, achievable as well as verifiable, with a clear distinction between short, medium and long term ones, directed to different stakeholders.

Evaluators' Comments	
Excellence	
Data Management	<ul style="list-style-type: none"> → The research data management and management of other research outputs is well in line with the FAIR principles. → The proposed research data management is in line with FAIR principles. → The research data management is very well planned and meets the requirements of FAIR principle. → Research data management and the management of other research outputs are adequately described and clearly in line with FAIR (Findable, Accessible, Interoperable, Reusable) principles. → Data Management Plan is fully addressed in the proposal including information on data findable, accessible, interoperable, and reusable. → Research data management is fully in line with FAIR principles.
Open science practices	<ul style="list-style-type: none"> → The strategy for fostering Open Science practices is good. It is based on open access publications, open peer-reviews, involvement of relevant stakeholders (industry, citizens, end-users). → Open science practices are implemented as integral part of the project and are relevant to the concerned experimental studies. → Open Science practices in terms of Open Access to publications and research data are very well considered and in a comprehensive manner. → Open Science practices for citizen engagement and multi-actor approach are very well planned through the active integration of the Regional Smart Specializations Quadruple helix community and involvement of the civil society organization. → The Open Science Practices are explicitly accommodated by the planned work and delivery of the objectives, implemented as an integral part of the proposed methodology, in relation to the proposal activities on data management and sharing. → The use of open science practices is well described. → Proposed open science practices are overall of good quality, relevant and well-suited for the proposed bioinformatic activities. → The proposal identifies suitable Open Science practices, adequately integrated into the methodology. → Compliance with Open Science practices and FAIR principles is properly described and analyzed per activity. → Open Science practices are explicitly engaged in all relevant areas (work, recruitment, deliverables) pertinent to the objectives, and they are integral to the corresponding methodology.

Evaluators' Comments	
Excellence	
Gender equality	<ul style="list-style-type: none"> → Gender objectives are sufficiently considered with regard to recruitment, and the coordinator institute declares that a gender equality plan has been already prepared. → The proposed actions will help for reducing the gender gap in the specific field of research of the proposal, with gender-sensitive recruiting policies. → The coordinating institution has committed to apply the principles of gender equality for both the personnel recruitment process as well as for the data collection and analysis aspects of the proposal in line with the ERA objectives.
CSA/Twinning Activities	<ul style="list-style-type: none"> → The quality of the proposed coordination and the support measures is excellent. → A comprehensive and scientific approach to all aspects of the methodology including coordination and support action is taken. → The proposed coordination and support measures, and the relative methodology to implement them, are clear and sound. → The quality of the proposed coordination and support measures is excellent with the interdisciplinary character of the proposed collaborative research being of particular merit. → The method of attracting an eminent academic to animate and drive the proposed coordination and support measures is, overall, properly programmed and well thought. → The proposed coordination and support measures are of high quality and highly effective. They include up-to-date, internationally recognized and tested approaches, and they will positively draw upon actual direct managerial and leadership experience in leading high-profile research centers of the ERA Chair holder.

Evaluators' Comments	
Impact	
Pathways towards Impact	<ul style="list-style-type: none"> → The pathways to achieve the expected outcome on system and organisation level are credible and very well addressed in the proposal, with the scale and significance appropriately demonstrated through the provided KPIs. → Pathways to achieve the expected outcomes at the system and the organization level are properly outlined and are relevant for the project. → To follow the performance and the impact created by the ERA Chair, different key impact pathways have been considered, for the scientific, societal, and economic impact areas. → The proposed pathways to achieve the expected outcomes and impacts are credible. → The impacts of the project are accurately and credibly explored through a number of clearly identified pathways with an adequately wide scale and extent. → The pathways to achieve societal and economic impacts have been well characterised and are convincing. → At the organizational level, especially at the institutional changes and improvement of human resources, the pathways to reach the expected outcomes and impacts are adequately evidenced. → The pathways to expected outcomes concerning the scientific visibility on national level created by the research team are concretely and sufficiently presented. → The pathways contributing to the expected impacts are indicated and credible. → The pathways to achieve the expected outcomes and impacts of this proposal are in large part credible.
Potential Barriers and mitigation Measures	<ul style="list-style-type: none"> → The proposal identifies the three main barriers concerning the research and innovation system, which may make it difficult to achieve the declared objectives. The targeted barriers are valid and the suggested solutions to overcome these barriers are effective. → Potential barriers and obstacles to expected impacts achievement have been properly identified. Mitigation measures as a response to some obstacles have been included in the proposal. → The barriers to achieve specific impacts (e.g., integration of the existing team, sustainable creation of permanent positions etc.) are sufficiently elaborated and mitigation measures are appropriately considered. → The potential barriers arising from factors beyond the scope and duration of the project are identified and sufficiently discussed. → Barriers to impact achievement are clearly identified, for example, public funding limitations and policy issues. The means by which such barriers will be overcome are adequately considered. → Potential barriers and obstacles have been properly identified by the SWOT analysis. → The proposal clearly discusses potential barriers and proposed mitigating measures are overall credible. → The proposal takes into account the potential barriers in relation with the outcomes of the impact, and also provides a series of proposed mitigation measures. → The potential barriers arising from factors beyond the scope and duration of the project are correctly and successfully identified and dealt with.

Evaluators' Comments	
Excellence	
Dissemination, exploitation and communication activities	<ul style="list-style-type: none"> → The quality of the dissemination actions is very good. The quality of the communication actions is very good. The quality of the preliminary exploitation actions is very good. → The proposed dissemination activities are adequate for the action and are proportionate to the scale of the action. → Different valuable communication activities are proposed; some of them are dedicated to non-specialists. → Valuable exploitations actions are foreseen including patenting, grant applications, participation in the networks and spin-off formation. → Measures proposed for the dissemination, communication, exploitation of results are of high quality and very well planned, covering a wide range of activities targeted at thoughtfully selected audiences. → The approach to the communication, dissemination and exploitation strategy is built on previous EU research findings and best practice guidance. → The communication activities for various target groups with very clear communication messages are very well structured and suitable for the project. → The dissemination, exploitation and communications activities have been drafted with care and attention and are suitably congruent with the scale and quality of the project. → Dissemination and communication measures are of high quality and are credible with well established and appropriate practices such as workshops and summer schools being used. Effective qualitative and quantitative KPIs to measure the effectiveness of both dissemination and communication activities are clearly provided. → Exploitation is adequately addressed with exploitable outputs being clearly identified. → The communication policy is well developed. → The dissemination actions are well determined and relevant. The initial exploitation actions are adequately elaborated. The identified communication means, and specific measures are adequate with respect to the work to be done. → The dissemination and exploitation plans are well addressed and provided in detail with measurable indicators, that are visible and are directly related with the methods to maximize impact. → The communication plan is appropriate to the scale of the project and well detailed including adequate main target audiences. → The draft plan of dissemination, exploitation and communication is well described and fully appropriate to the scale of the project.

Evaluators' Comments	
Implementation	
Work Plan	<ul style="list-style-type: none"> → The quality of the work plan is excellent. → The overall work plan is appropriate for the objectives and tasks planned in the proposal. → The work plan is coherent, effective, and divided into well-structured work packages (WPs) addressing the main scientific objectives. → The presented work plan is well structured, clearly laid out and covers well the intention of and work envisaged in the proposal. However, the entire work plan is relatively over-resourced. → The work plan is well structured and appropriate to the achievement of project objectives. The work packages are well detailed with the presented timings being appropriate. → The work plan is very well structured and outlined with sufficiently well-defined Work Package objectives that are further broken down into individual tasks, properly reflecting the expected outcomes of the action. → The work plan is overall well-structured and coherent to the work to be done. The timing of the five work packages, their components, their interrelations and the identified deliverables are very well elaborated. → The work plan is divided in distinct and clearly described WPs with targeted tasks and objectives. → The work plan is very well designed and will effectively support the implementation of the project, the timing and interrelations of the WP being clear and orderly.
Milestones/ Deliverables	<ul style="list-style-type: none"> → The definition of deliverables is very good. → Deliverables, as well as Milestones are appropriately defined and adequately scheduled during the project. → Deliverables, milestones and work packages are well connected. → The six work packages are described in detail, with matching steps, milestones and deliverables. → Milestones are clearly identified and referenced in a table, along with relevant means of verification. → Each WP is subdivided with a number of clearly identified KPIs and deliverables. → Deliverables and milestones are clearly presented with their number and relevance being suitably given the size of the project. → There is a comprehensive list of deliverables and milestones which are sufficient in number and well planned throughout the duration of the project, without overloading the progress monitoring activities. Another positive aspect is that all deliverables will be of public access. → The identified milestones are relevant as well as the corresponding verification means. However, there are some significant milestones which are not explicitly emphasized in the proposal. → Milestones are properly provided and related with specific intervals and activities of the project. → The proposed deliverables fit well into the work plan. Milestones are calibrated and linked to plausible means of verification.

Evaluators' Comments	
Implementation	
Capacity of participants and Consortium as a whole	<ul style="list-style-type: none"> → The capacity of the hosting institution matches well the project's objectives, including bringing together the necessary expertise. → The proposed ERA Chair holder candidate is an excellent researcher in the targeted scientific area. → The capacity of the hosting institution and the ERA Chair holder is very well presented in terms of research capacity as well as financial and organizational aspects. → The proposed ERA Chair is an excellent candidate with an appropriate track record and expertise to carry out the project. In addition, the project team as a whole is impressive. → The institution hosting the ERA Chair holder has the capacity to fulfil its obligations. → The capacity of the hosting institution and the ERA Chair holder match the project and call objectives. → Both the hosting institution and the ERA Chair holder demonstrate existing resources to provide and then develop the critical infrastructure to carry out the project activities. → The hosting institution and the ERA Chair holder are strongly complementary to one another. → The proposal explicitly demonstrates operational capacity of the partners. All partners have sufficient resources to fulfil their roles. → Each party has a valid role and sufficient capacity to fulfil that role. → The expertise and experience of the proposed ERA chair in terms of science and innovation is very well aligned with the objectives of the project. → The capacity of the coordinator is excellently demonstrated. → The chosen ERA Chair has a high-class academic profile, which matches very well with the project's objectives, the needs of the host institution, and the proposal's expectations. → The profile of the ERA Chair brings together all the necessary competencies for the successful completion of this project. → The host institution demonstrates strong expertise for implementing the project's activities and its contribution to the planned work via its selected team members with the ERA Chair holder is evident and well articulated. → The ERA Chair holder, as well as the team that is to be involved in the project, have the capacities that are needed to successfully operate and implement the different

Evaluators' Comments	
Implementation	
Risk Assessment and Mitigation measures	<ul style="list-style-type: none"> → A solid risk assessment and mitigation strategy plan are presented with an interpretation of both the likeliness that risks will occur and the impact that risks may have. → Overall major risks have been identified but the list is too short. → The risk assessment and contingency measures to overcome the risks related to team building, and scientific activities are rather generic and not sufficiently detailed. → The critical risks relating to project implementation are properly identified and sufficiently discussed. Most of the identified risks are assessed as “low” to “medium” likelihood and medium/high severity, which is adequate. → The proposed mitigation measures (mostly adjustments or increased effort) are relevant for most contingencies, but some measures are not sufficiently explained (e.g. adjusting research directions, adjusting proposal, delay). This is a minor shortcoming. → Overall, the risk assessment is of a good quality. Critical risks and suitable mitigation measures are clearly described. → Implementation risks have been properly identified and corresponding contingency measures have been adequately considered. → The identified risks are all relevant and the corresponding contingency measures are credible and sufficiently detailed. → Critical risks and the measures to mitigate these risks are properly provided and analysed. In addition, the specific risks are linked with specific WPs including the level and severity of each risk. → The critical risks relating to project implementation are properly identified. The corresponding proposed mitigation measures are generally appropriate with some exceptions.

Conclusion:

The highest total score of the projects for funding is: 14.50

(Threshold: 10) – 5 projects

Total score 14.00 – 7 projects

Total score 13.50 – 3 projects

Total score: 13.00 – 5 projects

Total score 12.50 – 3 projects

Total score 12.00 – 9 projects

Annex VIII Analysis of HopOn Facility Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2022-ACCESS-07-01

The following table is structured around the three main evaluation criteria: Excellence, Impact and Implementation. Exact evaluators' comments have been grouped, according to the main components addressed under the evaluation procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators' Comments	
Excellence	
Objectives	<ul style="list-style-type: none"> → The project's objectives convincingly demonstrate the computational/modelling work will bring the necessary complementary knowledge to efficiently perform the project's processes. → The objectives of the inclusion of the widening partner into the already ongoing project are clear and pertinent with respect to the needed workload in several parts of the initial DoA. → The proposal convincingly describes the enhancement of the project's objectives with the addition of the widening partner. → The proposal's objectives are clear and fully justified. → The objectives depicted are clearly stated and of significant pertinence.
Data Management	<ul style="list-style-type: none"> → The description of the state-of-the-art for modelling this specific reaction is very generic. → The proposed methodology is clearly identified and innovative. → The additional methodology proposed is very robust and presents good added value. → The proposed methodology is well described, very convincingly integrated with the overall project's objectives, and with emphasis on the bottlenecks needed to be overcome. → The proposed methodology is clearly ambitious and goes well beyond the state of the art.

Evaluators' Comments	
Excellence	
Open science practices	<ul style="list-style-type: none"> → The open science and data management approaches will comply with those defined in project. → Aspects regarding policies for open science and data management are insufficiently described. → No particular new elements or modifications of existing practices within the project with respect to open science, data management and → management are planned. The widening partner is committed to adhering to the Open Science practices planned by the project partners and will contribute to the updating of the Data Management Plan. → The considered underlying concepts addressing manufacturing challenges open science practices will ensure the upscaling of the project → outcomes to the industrial level in an eco-friendly manner leading to the engagement of stakeholders, civil society, and end-users. → Open science practices are considered and the project aims to maximize its impact by addressing various audiences including local scientific community and civil society.
Gender equality	<ul style="list-style-type: none"> → Although the gender dimension is not described in the proposal, the widening partner's organization has an effective Gender Equality Plan. → The gender dimension in the content of the research and innovation is appropriately considered.
CSA/Twinning Activities	

Evaluators' Comments	
Impact	
Pathways towards Impact	<ul style="list-style-type: none"> → The pathways to achieving of the enhanced outcomes and impacts are credible and convincingly presented. → The credibility of the widening partner's contribution to expanding the project's pathways is clearly specified and convincingly integrated with the achievement of expected outcomes and impacts of the work program.
Potential Barriers and mitigation Measures	

CSA/Twinning Activities

- The involvement of the widening partner in communication and dissemination activities is foreseen to boost the visibility of project overall achievements, including active young generation participation and web/social diffusion as well.
- While exploitation strategy is well explained, the dissemination and communication measures are however less convincing, as there are
- insufficient details regarding publishing papers in peer reviewed journals or communications at conferences and workshops.
- The IP management of the partner is in line with the strategy of the consortium and reasonable protection measures are foreseen.
- The communication and dissemination activities of the project will be extended to the new partner. However, significant shortcomings have been identified, such as: measures to maximise the impact triggered by the addition of the new partner have been only marginally presented and no key performance indicators (KPIs) to measure this impact towards the expected outcomes of the WIDERA topic have been included. Moreover, a strategy for intellectual property management is not mentioned.
- Several relevant dissemination channels are considered to widely and notably communicate the results to the non-scientific community.
- The IPR management strategy, concerning the involvement of the new partner, is insufficiently addressed and not clearly evident.
- The suitability of the measures to maximize expected outcomes and impacts is well demonstrated in the relevant activities set out in the
- dissemination and exploitation plan.
- The proposed communication and dissemination measures for promoting the project and its findings are convincing, thorough and well
- planned.
- The project aims to maximize its impact by addressing various audiences including local scientific community and civil society.

Evaluators' Comments	
Implementation	
Capacity of participants and Consortium as a whole	<ul style="list-style-type: none"> → The widening partner has the capacity to conduct the tasks, and has skills and experience to participate to such an ambitious interdisciplinary project. → The profile and capacity of the widening partner to carry out the work is presented convincingly. → The new partner will lead two tasks in work packages WP2 and WP3 of the original project, thus strengthening its integration in the project's consortium and giving it the opportunity to develop new skills and organizational capacity. → The new partner is well-suited for the tasks assigned. It has a high scientific and academic profile as demonstrated by the international university ranking and by its networking capacity. → The resources overall, including research facilities, equipment – partners, and person-months, are clearly outlined and pertinent. → The capacity, role, and added value to the ongoing project activities concerning the participation of the new widening partner are very credibly described and reveal the interplay between each participant. → The consortium brings together highly qualified and internationally recognized partners, possess the required infrastructures, and convincingly demonstrates that the consortium is professionally prepared to perform the successful implementation of the project tasks.
Risk Assessment and Mitigation measures	<ul style="list-style-type: none"> → The risk list is credible as well as the corresponding mitigation measures to ensure smooth progress of the project towards the assigned goal. → The risk mitigation plan reasonably addresses most of the scientific risks with a few, notable, exceptions. → Critical risks for implementation and the proposed mitigation measures are credible, but given their (at most) medium severity, they do not sufficiently establish high risk – high gain value of the added activity. → Contributions to other work packages and additional tasks are insufficiently described; that impacts the proper assessment of necessary resources for these other contributions to the overall project. → Although some risks are mentioned, the risk assessment provided does not sufficiently address the risks linked to the objectives, such as the lack of experience of the new partner in data management/handling. → The assessment of risks is well identified and supported by relevant and realistic mitigation measures. → One new low risk is reported but the risk-mitigation strategy is not convincingly integrated.

Evaluators' Comments	
Implementation	
Work Plan	<ul style="list-style-type: none"> → The widening partner's activity is well integrated in the work plan contributing to 2 out of 5 technical WPs with evenly distributed and pondered staff efforts, and also participating to the WP management. → The research methodology and work plan are overall well articulated since the Hop-on partner has a dedicated work package under its responsibility. → The work plan is well oriented towards the project's objectives. The work packages are presented in sufficient detail, with appropriately described objectives, tasks, deliverables and resources. The role of the new partner is clearly described, as well as the distribution of tasks and its effort in the overall project. → The effectiveness of the work plan is clear, professionally prepared, and in evident consistency with the overall approach. → The work plan is clearly defined.
Milestones/ Deliverables	<ul style="list-style-type: none"> → Deliverables for the additional work package cover all necessary aspects, having also one milestone foreseen, important for project → monitoring. → The added research value of new partner is well described in the task descriptions and the 4 appended deliverables and one milestone are suitably formulated. → The added value of the new partner is demonstrated in the work packages/tasks description, which appropriately includes attached → deliverables and milestones, when applicable. Person months involvement and budget requirement of the new partner are clearly outlined and justified. → The role of the new partner is clearly and convincingly described in the assigned subtasks in the respective existing work package and effort distribution. However, adding the proposed contributions to already existing work packages, rather than establishing a new one/s, pose additional risks for implementation and uncertainties in the overall flow of the deliverables and milestones. → The foreseen deliverables and milestones are coherent and timely aligned concerning the associated tasks and partners, although the expected activities in the corresponding tasks are presented in a rather generic manner. → The Pert and Gantt chart included are realistic, and the Milestones and Deliverables are appropriate for the proposed research.

Conclusion:

The highest **total score** of the projects for funding is: 15
(Threshold: 10) – 1 project

Total score 13.50 – 1 project

Total score: 13.00 – 3 projects

Total score 10.50 – 1 project

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