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# PRACTICAL GUIDE FOR EFFICIENT RESOURCE UTILIZATION AND COMMERCIALIZATION





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**PRACTICAL GUIDE FOR  
EFFICIENT RESOURCE  
UTILIZATION AND  
COMMERCIALIZATION**

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# LIST OF ACRONYMS

**AI** - Artificial intelligence

**CCI** - Cultural and creative industries

**CDR** - Carbon Dioxide Removal

**CEN**-European Committee for Standardization

**CENELEC** - European Committee for Electrotechnical Standardization SME - Small and Medium Enterprise

**CORDIS** - The Community Research and Development Information Service is the European Commission's primary source of results from the projects funded by the EU's framework programmes for research and innovation (FP1 to Horizon 2020).

**CSA** Coordination and Support Actions

**DoW** - Description of Work

**EBRAINS** - brain inspired technology

**EC** - European Commission

**EEN** - European Enterprise Network

**EIB** - European Investment Bank

**EIC** - European Innovation Council

**EIT** - European Institute of Innovation and Technology

**EOSC** - European Open Science Cloud

**ERA** - European Research Area

**ERC** - European Research Council

**ERDF** - European Regional Development Fund

**ESFRI** - European Strategy Forum on Research Infrastructures

**EU** - European Union

**FAQ** - Frequently Asked Questions

**FET** - Future and emerging technologies

**FP9 or Horizon Europe** - the research and innovation framework programme No 9

**FP8 or Horizon 2020** - the research and innovation framework programme No 9

**FP7** - The Seventh Framework Programme, European Union research and development funding programme



**FP6** - The Sixth Framework Programme, European Union research and development funding programme

**HEInnovate** - a self-assessment tool for Higher Education Institutions

**IA** - Innovation actions

**iCapital** - The European Capital of Innovation Award

**InvestEU** - EU Programme to support Union policies in a recovery from economic crises

**IPR** - Intellectual Property Rights

**IT** - Information Technology

**JRC** - Joint Research Centre

**KET** - Key enabling technologies

**KIC** - Knowledge and Innovation Communities

**KSO** - Key Strategic Orientation

**LEAR** - Legal Entity Appointed Representative

**NEB** - New European Bauhaus initiative

**NGO** - nongovernmental organisation

Next Generation EU Recovery and Resilience Facility, EU Fund

**NCP** - National Contact Points

**OECD** - Organisation for Economic Co-operation and Development

**RIA** - Research and Innovation Action

**R&I** - Research and Innovation

**SIA** - Strategic Innovation Agenda

**STE(A)M** - **STEM** fields (Science, Technology, Engineering and Math) with A added for Arts

**TRL** - Technology readiness level

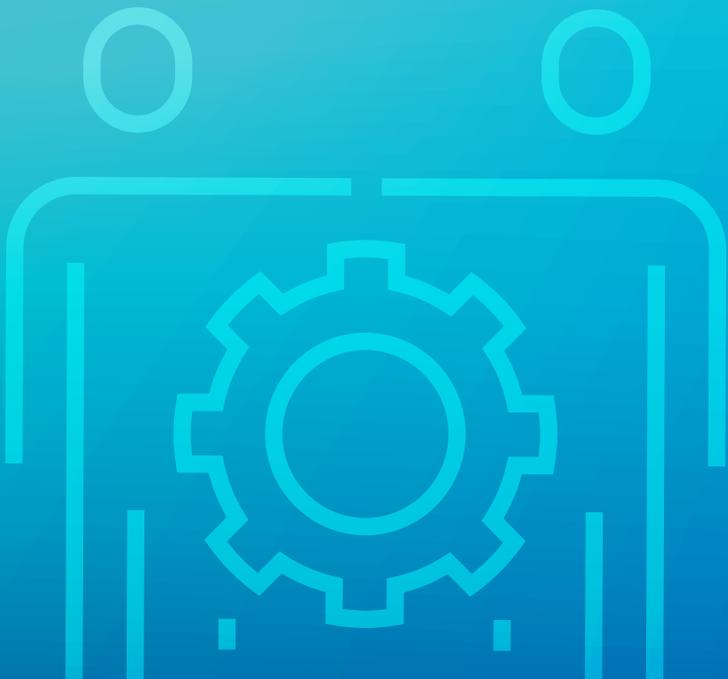
**UNCAN** - European Initiative to Understand Cancer

**WBS** - Work breakdown structure

**WP** - Work Package

**How to  
take part?**

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# How to use the Guide for efficient resource utilization and commercialization?

This guide is among the first ones for Horizon Europe intending to assist prospective participants to successfully navigate through hundreds of calls/topics and identify the best funding sources matching their needs. Guide sections II - V summarize the largest global research and innovation framework programme and focus readers' attention on *call/topics examples*.

The next objective of this Guide is to assist participants in *deciding and defining their role in the project*. Sections VI and VII explain the principles of how to analyse the call for proposals and create a consortium.

The philosophy of writing a winning proposal is briefly presented in Section VIII.

Lastly, the *explanation of what a grant agreement phase is and advice for project implementation* are provided in Section IX.

The guide is designed based on the compilation and adjustment of formal EC documents for the readers' needs and best practices of several senior experts and the author, and it addresses the most frequent questions of the participants and the most common mistakes of proposal writers. Bibliography at the end of this Guide refers readers to the original documents consulted in the process, for a more thorough read.

We have attempted to keep the content, the layout, and the style of this Guide as concise as possible.



Picture: Guidelines for efficient resource utilization and commercialization/Horizon Europe – Roadmap of how to participate

## What is the Horizon Europe Programme?

Understanding the ninth European Research and Innovation Framework programme (2021-2027) is a challenge, due to its size, scope and complexity.

The most common pitfall for prospective participants by far is “*not reading and implementing official instructions*”. Indeed, for a majority of novice participants understanding the entire programme is *hardly possible, and it is not needed* for successful participation.

Therefore, in this Guide, the presentation of Horizon Europe serves to provide orientation, “where” you can take part: in which pillars, work programmes, calls/ topics, and types of actions, while more experienced participants can find new funding opportunities.

The second pitfall for novice participants is to find a suitable role. Deciding between leading a consortium, joining a consortium as a partner, or leading a sole participant project differentiates three *different roadmaps for participants*. To add to the complexity, *consortium creation and proposal writing* also differ for each call/topic as Horizon Europe offers the largest number of funding opportunities on the globe, but also the most competitive ones.

Sections VI-IX of this Guide provide *the key variables for success* in each step, from call analysis, choosing a role, consortium creation to writing a winning proposal and preparation for project implementation.

Horizon Europe is the research and innovation framework programme running from 2021-2027. As it was mentioned in the introduction it is the *ninth programme* succeeding previous Horizon 2020 (FP8), FP7, FP6 and other similar instruments before mid-80s, so it builds further on the world’s leading research and innovation project database. Horizon Europe begins with a budget of around €95.5 billion which makes it the greatest open R&I funding source in the world. The aim of Horizon Europe is keeping the EU at the forefront of global research and innovation. Operational objectives are *consequently* widely and strategically set:

- supporting the implementation of *Union policy priorities* including the *sustainable development goals* and the *Paris Agreement*; delivering, through R&I *missions* on ambitious goals;

- strengthening *excellent basic and frontier research*; promoting *excellence*, broadening participation; strengthening the *gender dimension*; *international cooperation*; promoting *responsible research and innovation*;

- reinforcing the *link between research, innovation, education and other policies*; increasing collaboration links in European *research and innovation* and across sectors and disciplines;

- improving the relationship between *science and society*, the *visibility of science and science communication*, and promoting the *involvement of citizens and end-users* in *co-design* and *co-creation* processes;

- 5 attracting talent, training and retaining researchers and innovators in the European Research Area;
- 6 fostering open science and ensuring visibility to the public and open access to scientific publications and research data;
- 7 developing research infrastructures across the European Research Area and providing transnational access;
- 8 encouraging exploitation of R&I results for leveraging private investments and policy development; improving access to risk finance, through synergies with InvestEU as well, in particular where the market does not provide viable financing;
- 9 accelerating industrial transformation, through improved skills for innovation as well;
- 10 stimulating R&I activities in SMEs and the creation and scale-up of innovative companies, in particular start-ups, SMEs, and in exceptional cases small mid-caps;

For a thoughtful reader, operational objectives reveal the vision of the European research and Innovation area and may position project initiatives to contribute to its attainment.

Horizon Europe structure is divided across 3 pillars: Excellent Science, Global Challenges and European Industrial Competitiveness, and Innovative Europe. In addition to this, there is a Horizontal part Widening Participation and Strengthening the European Research Area. Each Horizon Europe Pillar and Part consists of specific thematic sections which are covered by their own work programmes.

 Link for the Video Introduction of Horizon Europe Structure: <https://youtu.be/D3v2IBUYB64>

<p><b>Pillar 1</b> Excellent Science </p> <p>European Research Council</p> <hr/> <p>Marie Skłodowska-Curie Actions</p> <hr/> <p>Research Infrastructures</p>	<p><b>Pillar 2</b> Global Challenges and European Industrial Competitiveness </p> <p>CLUSTERS:</p> <ul style="list-style-type: none"> <li>• Health</li> <li>• Culture, Creativity and Inclusive Society</li> <li>• Civil Security for Society</li> <li>• Digital, Industry and Space</li> <li>• Climate, Energy and Mobility</li> <li>• Food, Bioeconomy, Natural Resources, Agriculture and Environment</li> </ul> <hr/> <p>Joint Research Centre</p>	<p><b>Pillar 3</b> Innovative Europe </p> <p>European Innovation Council</p> <hr/> <p>European innovation ecosystems</p> <hr/> <p>European Institute of Innovation and Tehnology</p>
<p><b>Widening Participation and Strenghtening the European Research Area</b></p>		
<p>Widening participation and spreading excellence</p>	<p>Reforming and Enhancing the European R&amp;I system</p>	

Picture: Horizon Europe Structure

# What is a Work Programme?

Work programmes set out funding opportunities under Horizon Europe. The content of work programmes for Horizon Europe is prepared by strategic planning and the resultant strategic plan. The preparation of work programmes involves the consultation of stakeholders. For this purpose, Advisory Groups have been set up representing the broad constituency of stakeholders ranging from industry and research to representatives of civil society.

The current main Horizon Europe work programme comprises an introduction, thematic sections and the general annexes describing general rules such as standard admissibility conditions and eligibility criteria, selection and award criteria, etc.

Each thematic section is self-contained and describes the overall objectives, the respective calls for proposals and the topics within each call.

With calls for proposals the Commission selects, on a competitive basis, organizations or natural persons to implement projects co-financed by EU because these projects contribute to EU policy aims. You can find more detailed information, including budget allocation, in the programme sections.

It often happens that draft work programmes are published or even leaked prior to the official versions and prior to the official call launch. These are principally distributed to the Programme Committees (composed of National Delegates) for comments. Though they are not official documents, they can serve as useful material for other stakeholders to initiate preparations for future proposals, as they provide valuable outline of the calls to be launched. Draft work programmes are available from Horizon Europe NCPs, support actions websites like <https://eufunds.info/>, whereas the Official Work Programmes are published at Funding & Tender Opportunities Portal.

The screenshot shows the 'Funding & tender opportunities' portal. On the left, there's a navigation menu with 'SEARCHING & TENDERS', 'HOW TO PARTICIPATE', 'PROJECTS & RESULTS', 'WORK PROGRAMMES', and 'SUPPORT'. The main content area is titled 'Work Programme' and includes a 'Table of Contents' with sections like 'Introduction', 'Key Funding', 'EU Strategic challenges', 'AI, Quantum and Business Acceleration Initiatives', and 'AI, Quantum and Business Acceleration Initiatives'. A 'Call for Proposals' section is highlighted, containing text about the 'AI Accelerator' and 'Quantum Accelerator'.

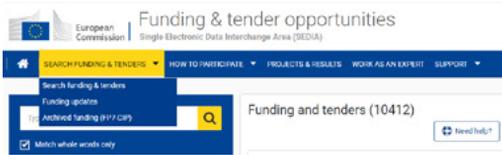
Picture: Funding & Tender Opportunities Portal reference documents, Work Programme content and Calls for Proposals

Link: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

Link: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021/wp\\_horizon-eic-2021\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021/wp_horizon-eic-2021_en.pdf)

## What is a Funding & Tender Opportunities Portal?

The Funding & Tender Opportunities Portal is the single-entry point (the Single Electronic Data Interchange Area) for applicants, contractors and experts in funding programmes with all relevant information and instructions.



This is where the ‘Calls for Proposals’ are published and where proposals are submitted electronically. Participants, planning to take part in Horizon Europe, must have a thorough understanding of what is commonly referred to as a “Participant Portal”. This Guide does not describe the Portal in detail, but provides basic information, as the European Commission has a comprehensive set of guidelines and online training tools related to the portal.



*Funding & Tender Opportunities Portal*

Link: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

Funding & Tender Opportunities Portal contains the following sections: [Search for funding and tenders](#) with open, closed and forthcoming calls; [Reference documents](#) such as Application forms and Evaluation forms; [Partner search](#); [Projects and results](#) and other relevant information for applicants and participants. We shall be referring to *different Funding & Tender Opportunities Portal sections and tools throughout this Guide* as it is a major source of information

for participants and offers wide-ranging options to “Get support” i.e.: Partner search, Online Manual which is your guide on the procedures from proposal submission to managing your grant, Horizon Europe Programme Guide which contains detailed guidance to the structure, budget and political priorities of Horizon Europe, Research Enquiry Service, Enterprise Europe Network, IT Helpdesk and European IPR Helpdesk which can assist you with matters concerning intellectual property. On the other hand, CEN and CENELEC, the European Standards Organisations, advise you as to how to tackle standardization in your project proposal.

## Registration of Participants

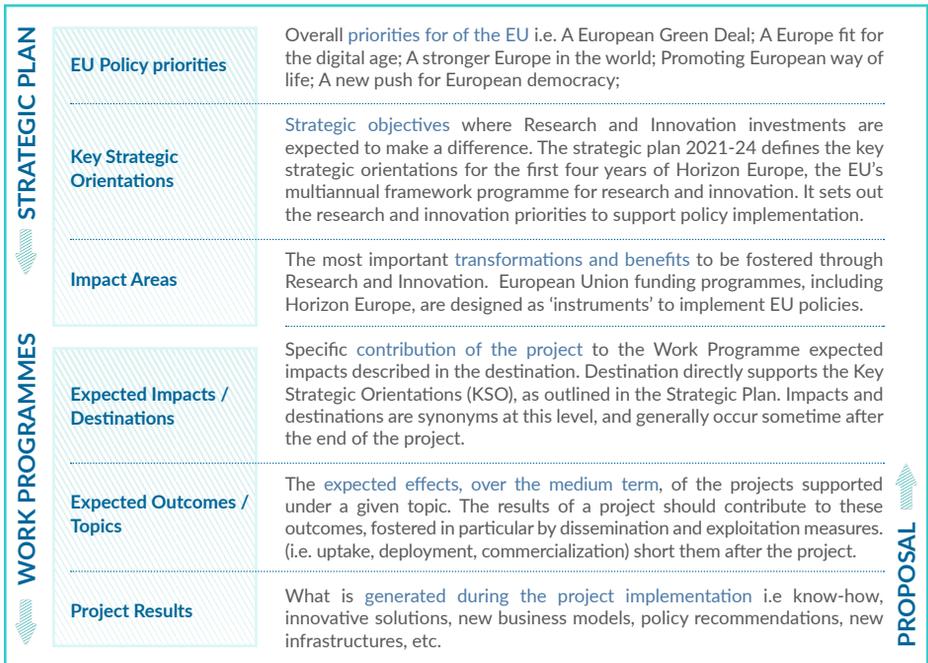
For participation, you must register your organization following the instructions provided at the Funding & Tender Opportunities Portal at:



Registration Link:

<https://ec.europa.eu/research/participants/urf/registration/research>

# Understanding the logic behind how Horizon Europe works



To fully understand Horizon Europe, it is necessary to understand the political priorities of the European Union i.e. 'How do they think in Brussels?'. Policy making is about long-term planning to address EU challenges and funding programmes like Horizon Europe **are instruments designed to implement EU policy objectives**. Following the European elections in May 2019, the European Union set a number of priorities that shape the political and policy agenda until 2024. Four main priorities are in focus: protecting citizens and freedoms; developing a strong and vibrant economic base; building a climate-neutral, green, fair and social Europe; promoting European interests and values on the global stage.

The EU institutions reached a political agreement on Horizon Europe in December 2020 and set the budget for Horizon Europe at €95.5 billion (including €5.4 billion from the Next Generation of the EU – Recovery Fund). Based on Horizon Europe 'Strategic Plan', a 2-year 'Work programme' is designed. The first work programme defines the contents of the Calls for 2021 and 2022.

Project proposals responding to Calls are expected to ensure that all outcomes and impacts (destinations) concerned with the specific topics listed in the Work Programme are achieved. Novice participants may be confused with the complexity of calls/topics,

evaluation criteria, types of actions, or be overloaded with information etc. Therefore, understanding the logic behind the FP9 helps to see the big picture, where your projects fit and cope with the complexity of the calls.

The next four sections of the Guide should provide novice participants with an overview of where to take part, based on the Calls/Topic examples, Impact/Destinations, and Work Programme aims. The terminology used in the next sections is mostly extracted from relevant official documents to avoid misunderstandings. Misinterpretations as a consequence of “not reading” instructions are a major barrier for novice participants. **The objective of the next four sections is NOT to educate readers about the entire Horizon Europe programme, nor to promote it, but to provide a Tool, orientation map for participants to find “where” (in which calls) to take part.** Thus, you are advised simply to identify Topics or areas that match your interest in the Horizon Europe structure. Each section provides a summary of the most relevant information and calls/topics examples for participants to make informed decisions.

Do note that the network of **National Contact Points (NCPs)** is the main structure to provide guidance, practical information and assistance on all aspects of participation and calls/topics. They provide information and on-the-ground advice to potential applicants and beneficiaries, through the project life cycle, in their own language.

NCPs have a key role in delivering the programme’s objectives and impacts ensuring that it becomes known and readily accessible to all potential applicants. You can ask for personalised support in your national language from your NCPs at:



NCPs Link:

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/ncp>

**PILLAR 1**  
**Excellent Science**

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## Advancing and extending the excellence

The Excellent Science Pillar aims to increase the EU's global scientific competitiveness. It supports **frontier research projects** driven by top researchers through the European Research Council, funds **fellowships for experienced researchers, doctoral training networks and exchanges** through Marie Skłodowska-Curie Actions, and invests in world-class **research infrastructures**.

The Excellent Science pillar consists of three main sections:

- **European Research Council (ERC)**

Funding frontier research designed and led by the best researchers in Europe. ERC consists of three main calls:

**Starting Grant** - Support for excellent Principal Investigators at the career stage at which they are **starting their own independent research team or programme**. Principal Investigators must demonstrate the **ground-breaking nature, ambition and feasibility** of their scientific proposal. Up to EUR 1 500 000 for a period of 5 years. Additional funding up to EUR 1 000 000.

**Consolidator Grant** - Support for excellent Principal Investigators at the career stage at which they may still be **consolidating their own independent research team or programme**. Principal Investigators must demonstrate the **ground-breaking nature, ambition and feasibility** of their scientific proposal. Up to EUR 2 000 000 for a period of 5 years. Additional funding up to EUR 1 000 000.

**Advanced Grant** - Support for excellent Principal Investigators at the career stage at which they are **already established research leaders with a recognized track record of research achievements**. Principal Investigators must demonstrate the **ground-breaking nature, ambition and feasibility** of their scientific proposal. Up to EUR 2 500 000 for a period of 5 years. Additional funding up to EUR 1 000 000.



Link: <https://eufunds.info/>

Programmes and Funding & Tender Opportunities Portal:

[https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021/wp\\_horizon-erc-2021\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2021/wp_horizon-erc-2021_en.pdf)

- **Marie Skłodowska-Curie Actions (MSCA)**

MSCA mostly funds **fellowships and mobility** of researchers. It is the Union's reference programme for **doctoral education and postdoctoral training**.

MSCA consists of the following main calls 21-22:

**The MSCA Doctoral Networks** aim to train **creative, entrepreneurial, innovative and resilient doctoral candidates**, able to face current and future challenges and to **convert knowledge and ideas into products and services for economic and social benefit**. MSCA DN will equip researchers with the right combination of research-related

and transferable competencies and provide them with enhanced career perspectives in both the academic and non-academic sectors through international, interdisciplinary and inter-sectoral mobility combined with an innovation-oriented mindset.

The goal of **MSCA Postdoctoral Fellowships** is to enhance the creative and innovative potential of researchers holding a PhD, wishing to acquire new skills through advanced training, international, interdisciplinary and inter-sectoral mobility. MSCA Postdoctoral Fellowships are open to excellent researchers of *any nationality including researchers wishing to reintegrate in Europe, researchers who are displaced by conflict as well as researchers with high potential aiming for a career restart in research*. The scheme also encourages researchers to work on research and innovation projects in the non-academic sector.

**MSCA Staff Exchanges** promote innovative international, inter-sectoral and interdisciplinary collaboration in research and innovation through exchanging staff and sharing knowledge and ideas at all stages of the innovation chain. The scheme fosters a shared culture of research and innovation that welcomes and rewards creativity and entrepreneurship and helps turn ideas into innovative products, services or processes. It is open to research, technical, administrative and managerial staff.

**MSCA COFUND** co-finances new or existing doctoral programmes and postdoctoral fellowship schemes at national, regional or international level with the aim to spread the best practices of the MSCA including international, inter-sectoral and interdisciplinary research training, as well as transnational and cross-sectoral mobility of researchers at all stages of their career.

**MSCA and Citizens**, through the **European Researchers' Night**, aims to bring research and researchers closer to the public at large, to increase awareness of research and innovation activities and to boost public recognition of science and research education. It will also show the role of the researcher for the society and economy, as well as the **impact of researchers' work on citizens' daily lives**, and aim at raising young people's interest for research and scientific careers.

**MSCASupport** is aimed at promoting, supporting and complementing the MSCA implementation, targeting for example NCPs, initiatives focused on Researchers at Risk etc.



Link: <https://eufunds.info/>

Programmes and Funding & Tender Opportunities Portal:

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

## ● Research Infrastructures (RI)

The overall objective of the Research Infrastructure Programme under Horizon Europe is to empower Europe through world-class and accessible Research and Technology Infrastructures.

Example of main calls/topics 21-22 include:

Support to the European Strategy Forum on Research Infrastructures (ESFRI), e-Infrastructure Reflection Group, bilateral cooperation, Developing European Research Infrastructures, ESFRI Research Infrastructure projects, EOSC ecosystem, Enabling discovery and interoperability of federated research objects across scientific communities, FAIR and open data sharing<sup>1</sup> in support of European preparedness for infectious diseases, cancer research, Research Infrastructure services to support health research, accelerate the green and digital transformation, and advance frontier knowledge, rapid research responses to infectious disease epidemics, research addressing cancer, sustainable and resilient agriculture

and agro-ecological transitions, responding to climate-related risks on the environment, development of materials for a circular economy, inclusive Global Value Chain and Europe recovery from socio-economic crises, advancing frontier knowledge, better use of imaging, neuroscience research for health and brain inspired technology via EBRAINS, Next generation of scientific instrumentation, tools and methods, Interdisciplinary digital twins, Network connectivity in Research and Education.



Link: <https://eufunds.info/>

Programmes and Funding & Tender Opportunities Portal.

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

<sup>1</sup> FAIR data are data which meet principles of findability, accessibility, interoperability, and reusability. The acronym and principles were defined in a March 2016 paper in the journal *Scientific Data* by a consortium of scientists and organizations

**PILLAR 2**  
**Global Challenges and  
European Industrial  
Competitiveness**

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# Boosting key technologies and solutions underpinning EU policies

The Global Challenges and European Industrial Competitiveness Pillar supports research related to societal challenges and reinforces technological and industrial capacities through clusters. It sets ambitious goals for five EU missions and six Clusters. It also includes the Joint Research Centre which supports EU and national policymakers with independent scientific evidence and technical support.

## SIX CLUSTERS

Six thematic clusters cover the entire range of the Sustainable Development Goals and have an interdisciplinary or transdisciplinary orientation (including the humanities, social and cultural sciences).

### 1. Health

'Health' is directed towards two Key Strategic Orientations creating a more resilient, inclusive and democratic European society and promoting an open strategic autonomy by leading the development of key digital, enabling and emerging technologies, sectors and value chains. It aims to mainly contribute to four impact areas of the strategic plan:

-  Good health and high-quality accessible health care;
-  A resilient EU prepared for emerging threats;
-  High-quality digital services for all;
-  A competitive and secure data economy.

Expected Impacts are:

-  Destination 1. Staying healthy in a rapidly changing society
-  Destination 2. Living and working in a health-promoting environment
-  Destination 3. Tackling diseases and reducing disease burden
-  Destination 4. Ensuring access to innovative, sustainable and high-quality health care
-  Destination 5. Unlocking the full potential of new tools, technologies and digital solutions for a healthy society
-  Destination 6. Maintaining an innovative, sustainable and globally competitive health industry

Example of main calls/topics 21-22 include:

Digital empowerment and health literacy, Personalised prevention, Staying healthy, Boosting mental health, Artificial intelligence tools, Prevention of obesity, Chronic inflammation, Environmental stressors, Electromagnetic fields, Air quality, Climate change costs, Risks from chemicals, End-of-life care, Repurposing of medicinal products, Poverty related diseases, Individual host response to viruses, antimicrobial resistance, Pandemic preparedness, Next generation of immunotherapies, Vaccines 2.0, Therapies for rare diseases, Risk reduction in adolescence and youth, Quality of care and patient safety, Data-driven decision-support tools, Innovation procurement network,

Access to health care, Resilience of health care systems, Better economic foresight, financial planning, and procurement/contractual strategies, Smart medical devices and their surgical implantation, Next generation advanced therapies, Innovative tools for use and re-use of health data, Prescription drugs for major diseases, Health technology assessment, Computational models, Green pharmaceuticals, new antimicrobials, trusted mHealth label in Europe: health and wellness apps, Cybersecurity of medical devices, Scaling up computation, New pricing and payment models for cost-effective and affordable health innovations, Setting up a European Smart Health Innovation Hub, and European Electronic Health Record Exchange Format Ecosystem.



Link: <https://eufunds.info/Programmes and Funding & Tender Opportunities Portal>:  
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

## 2. Culture, Creativity, and Inclusive Society

Cluster 'Culture, Creativity and Inclusive Society' aims to meet EU goals and priorities on enhancing democratic governance and citizens participation, on the safeguarding and promotion of cultural heritage, and to respond to and shape multifaceted social, economic, technological and cultural transformations. Cluster 2 mobilises multidisciplinary expertise of European social sciences and humanities for understanding fundamental contemporary transformations of society, economy, politics and culture. It aims to provide evidence-based policy options for a socially just and inclusive European green and digital recovery.

Expected Impacts are:

- ✓ Destination 1. Innovative Research on Democracy and Governance
- ✓ Destination 2. Innovative Research on the European Cultural Heritage and the Cultural and Creative Industries
- ✓ Destination 3. Innovative Research on Social and Economic Transformations

Example of main calls/topics 21-22 include:

Protecting and nurturing democracies, The future of liberal democracy, Economic models and modern democracies, Feminisms, EU's neighbourhood, Civic participation, The impact of inequalities, Politics and governance in a post-pandemic world, Reshaping democracies, Artificial intelligence, big data and democracy, Education for democracy, Political extremism, Media, Online social networks and new media, Global governance for a world in transition, Cultural Heritage, Creative Industries, Museums and other cultural institutions, anthropogenic threats, Europe's cultural heritage and arts, Perceptions, values and beliefs in politics, Traditional crafts, European music ecosystem, European filmmaking industry, Effects of climate change and natural hazards on cultural heritage and remediation, Games and culture, European Bauhaus, Social and Economic Transformations, Inclusiveness in times of change, Irregular migrants in Europe, Changing world of work and social protection, Determining key drivers of inequality trends, Culture, creativity and inclusive society, Poor learning outcomes in basic skills and early school, Emerging new technologies in education and training, New normal? Employment and social impacts, Contemporary China in Europe, Spatial mobility,

Gender and social, economic and cultural empowerment, Inclusive labour market, Strengthening racial, ethnic and religious equality, Return and readmission of irregular migrants, Socio-economic effects of ageing societies.



Link: <https://eufunds.info/Programmes and Funding & Tender Opportunities Portal>:  
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

### 3. Civil Security for Society

Cluster Civil Security for Society will support the implementation of EU policy priorities relating to security, including cybersecurity, and disaster risk reduction and resilience. In addition, it will build on lessons learnt from the COVID-19 crisis in terms of prevention, mitigation, preparedness and capacity building for crises (including health crises) and in improving cross-sectoral aspects of such crises.

Expected Impacts are:

-  Destination 1. Better protect the EU and its citizens against Crime and Terrorism
-  Destination 2. Effective management of EU external borders
-  Destination 3. Resilient Infrastructure
-  Destination 4. Increased Cybersecurity
-  Destination 5. Disaster-Resilient Society for Europe
-  Destination 6. Strengthened Security Research and Innovation

Example of main calls/topics 21-22 include:

Crime and Terrorism, Modern information analysis, Travel intelligence, Lawful interception, Disinformation and fake news, Improved forensics, Modern biometrics, Domestic and sexual violence, Preparedness on attacks, Organised crime and environmental crime, Trafficking in cultural goods, Firearms, Cybersecurity, Child sexual exploitation, Corruption, Drugs production, Trafficking in human beings, Online identity theft, Crime scene investigations, Abuse of online gaming culture, Management of EU external borders, Border surveillance and maritime security, surveillance capability, Customs and supply chain security, Threats and illicit goods in postal and express courier flows, Underwater detection, Resilient Infrastructure, Large-scale disruptions of European infrastructures, Systemic risks, Pandemics, Resilient and secure smart cities, Hardware, software and supply chain security, AI for cybersecurity, Human-centric security, privacy and ethics, privacy-preserving technologies, security “by design”, Quantum-Resistant Cryptography, Agile certification, Disaster-Resilient Society, Increased risk Awareness and preparedness, multi-hazards, extreme climate events, adaptive capabilities and scenario building, climate-related disasters, natural hazards, capacities of first and second responders, Fast deployed mobile laboratories, citizens’ behavioural and psychological reactions, forecasting and early warning, time-to-react in urban areas, rescue operations, Knowledge Networks, Demand-led innovation for situation awareness, foresight capacity, Innovation uptake, Pre-commercial procurement of innovative security technologies, Social innovations as enablers of security solutions and increased security perception.

## 4. Digital, Industry and Space

Progress in digital and industrial technologies, including in space, shape all sectors of the economy and society. Areas of intervention are wide and include:

-  Manufacturing technologies;
-  Advanced materials;
-  Next-generation internet;
-  Circular industries;
-  Space, including Earth Observation;
-  Emerging enabling technologies;
-  Key digital technologies, including quantum technologies;
-  Artificial Intelligence and robotics;
-  Advanced computing and Big Data
-  Low carbon and clean industry.

Expected Impacts are:

-  Destination 1. Climate-neutral, circular and digitized production
-  Destination 2. Increased autonomy in key strategic value chains for resilient industry
-  Destination 3. World-leading data and computing technologies
-  Destination 4. Digital and emerging technologies for competitiveness and fit for the green deal
-  Destination 5. Open strategic autonomy in developing, deploying and using global space-based infrastructures, services, applications and data
-  Destination 6. A human-centred and ethical development of digital and industrial technologies

Example of main calls/topics 21-22 include:

Innovations in manufacturing, AI robotics systems, Laser-based technologies, Data-driven Environments, New construction, Digital permits, Construction waste, Hubs for circularity, Plastic waste as feedstock, Electrification in process industry, Sustainability in SMEs, Digital tools to support the engineering of a Circular Economy, Raw material preparation for green production, Ensuring circularity of composite materials, IoT for European Data, Data sharing in the common European data spaces, Technologies and solutions for data trading, monetizing, exchange and interoperability, Strengthening Europe's data analytics capacity, Ultra-low-power, secure processors for edge computing, Open Source Hardware, European Innovation Leadership in Electronics, European Innovation Leadership in Photonics, Tomorrow's deployable Robots: Pushing the limit of robotics cognition, European Network of Excellence Centres in Robotics, Academia-Industry Forum, Advanced spintronics, Quantum Technologies, Photonics, Graphene, Graphene Flagship projects, European Network of AI Excellence Centres, AI to fight disinformation, Internet community-building, eXtended Reality, Modelling, Haptics, Telepresence, Fostering standardisation to boost European industry's competitiveness, Testing innovative solutions on local communities'-demand, Art-driven use experiments and design, Workforce skills for industry 5.0, An 4Internet of Trust, Internet architecture and decentralised technologies, Safer Internet.



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## 5. Climate, Energy and Mobility

The overarching driver for Climate, Energy and Mobility cluster is to accelerate the twin green and digital transitions and associated transformation of our economy, industry and society with a view to achieving climate neutrality in Europe by 2050. This encompasses the transition to greenhouse gas neutrality of the energy and mobility sectors by 2050 at the latest (as well as that of other sectors not covered by this cluster), while boosting their competitiveness, resilience, and utility for citizens and society. Europe has been at the forefront of climate science and is committed to keep delivering the knowledge for enabling efficient pathways to climate neutrality.

Expected Impacts are:

-  Destination 1. Climate sciences and responses for the transformation towards climate neutrality
-  Destination 2. Cross-sectoral solutions for the climate transition
-  Destination 3. Sustainable, secure and competitive energy supply
-  Destination 4. Efficient, sustainable and inclusive energy use
-  Destination 5. Clean and competitive solutions for all transport modes
-  Destination 6. Safe, Resilient Transport and Smart Mobility services for passengers and goods



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Example of main calls/topics 21-22 include:

Improved understanding of greenhouse gas fluxes and radiative forcers, including carbon dioxide removal technologies, Modelling the role of the circular economy for climate change mitigation, Maximising the impact and synergy of European climate change research and innovation, Restoration of natural wetlands, peatlands and floodplains as a strategy for fast mitigation benefits, Carbon Dioxide Removal (CDR) approaches, Socio-economic risks of climate change in Europe, Social science for land-use strategies in the context of climate change and biodiversity challenges, Climate sciences and responses, Support for establishment of R&I ecosystem, developing strategic forward-looking orientations to ensure future skills development, knowledge and technological leadership for accelerated disruptive technology exploration and uptake (Batteries Partnership), Emerging breakthrough technologies and climate solutions, Emerging technologies for a climate neutral Europe, Methane cracking to usable hydrogen and carbon, Technologies for non- CO2 greenhouse gases removal, Direct atmospheric carbon capture and conversion, Citizens and stakeholder engagement, Smart and efficient ways to construct, maintain and decommission with zero emissions from transport infrastructure, New concepts and approaches for resilient freight transport and logistics networks against disruptive events (including pandemics).

## 6. Food, Bioeconomy, Natural Resources, Agriculture and Environment

Cluster Food, Bioeconomy, Natural Resources, Agriculture and Environment aims to provide opportunities to enhance and balance environmental, social and economic goals and to set human economic activities on a path towards sustainability. The underlying paradigm of Cluster 6 is therefore the need for a transformative change of the EU economy and society aimed at reducing environmental degradation, halting and reversing the decline of biodiversity and to better manage natural resources while serving the EU's climate objectives and ensuring food and water security.

Expected Impacts are:

- ✓ Destination 1. Biodiversity and Ecosystem Services
- ✓ Destination 2. Fair, healthy and environmentally friendly food systems from primary production to consumption
- ✓ Destination 3. Circular economy and bioeconomy sectors
- ✓ Destination 4. Clean environment and zero pollution
- ✓ Destination 5. Land, oceans and water for climate action
- ✓ Destination 6. Resilient, inclusive, healthy and green rural, coastal and urban communities
- ✓ Destination 7. Innovative governance, environmental observations and digital solutions in support of the Green Deal

Example of main calls/topics 21-22 include:

Identifying all biodiversity on Earth, Valuing and restoring biodiversity and ecosystem services, The economics of nature-based solutions: cost-benefit analysis, market development and funding, Nature-based solutions, prevention and reduction of risks and the insurance sector, Quantify impacts of the trade in raw and processed biomass on ecosystems, for offering new leverage points for biodiversity conservation along supply chains, to reduce leakage effects, Biodiversity, water, food, energy, transport, climate and health nexus in the context of transformative change, Policy mixes, governance (including financing) and decision-making tools for transformative action for biodiversity, Enhancing biosecurity in terrestrial livestock production, Externalities of agri-food products for incentivising sustainable choices, Effective systems for authenticity and traceability in the food system, Support for international research on infectious animal diseases, Enabling sustainable farming, Agroecological approaches for sustainable weed management, Emerging and future risks to plant health, Animal disease ecology, Smart solutions for the use of digital technologies for small- and medium-sized, farms and farm structures, Enabling sustainable fisheries and aquaculture, Innovative food from marine and freshwater ecosystems.



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# FIVE MISSIONS IN HORIZON EUROPE

EU missions aim to address some of the greatest challenges faced by our society. They are bold and inspirational with clear objectives that are, realistic, measurable, targeted and time-bound to be resolved by 2030. Rooted in research and innovation, EU missions aim to tackle societal challenges with systemic solutions, leading to societal transformations and social impact. Missions will help deliver key EU policy priorities such as the European Green Deal, Europe’s Beating Cancer Plan, Next Generation EU and the Recovery and Resilience Facility, the EU Industrial Strategy, the Europe fit for the Digital Age, amongst others. To achieve their goals and promote societal change, EU missions will implement the reuse and reproducibility of research results such

as FAIR research data and open access to scientific publications. Also, the missions will closely involve citizens in their identification, implementation and monitoring throughout their duration, showcasing the added value of the EU as well.

EU missions are a novel instrument in Horizon Europe. For their successful implementation they will work in synergy and coordination with other missions, parts of Horizon Europe, particularly with European Partnerships and Clusters, as well as with other EU funding instruments and policies. Furthermore, they will need to be implemented in close synergy with funding, programmes and strategies both at Member State/Associated Country and regional level, as well as with civil society and the private sector.

## Five Mission Areas:

 <p><b>Adaptation to climate change including societal transformation</b></p>	<p>Calls/Topic: Better prepared regional and local authorities to adapt to climate change</p>
 <p><b>Cancer</b></p>	<p>Calls/Topic: Preparing UNCAN.eu, a European initiative to understand cancer</p>
 <p><b>Climate-neutral and smart cities</b></p>	<p>Calls/Topic: Supporting national, regional and local authorities across Europe to prepare for the transition towards climate neutrality within cities</p> <p>Calls/Topic: Collaborative local governance models to accelerate the emblematic transformation of urban environment and contribute to the New European Bauhaus initiative<sup>2</sup> and the objectives of the European Green Deal</p>
 <p><b>Healthy oceans, seas, coastal and inland waters</b></p>	<p>Calls/Topic: Preparation for deployment of lighthouse demonstrators and solution scale ups and cross-cutting citizen and stakeholder involvement</p>
 <p><b>The health of the soil and food</b></p>	<p>Calls/Topic: Preparing the ground to turn it into healthy soils: building capacities for engagement, outreach and expertise</p>

*2 The New European Bauhaus initiative connects the European Green Deal to living spaces. It calls on all Europeans to imagine and build together a sustainable and inclusive future that is beautiful for our eyes, minds, and souls.*

Other Work programme Impacts state:

- ✓ Destination: Deployment of missions at the national level; Transnational cooperation on the missions-approach.
- ✓ Destination: Deployment of NEB lighthouse demonstrators in the context of missions

Call/Topics Examples: Support the deployment of lighthouse demonstrators for the New European Bauhaus initiative in the context of Horizon Europe missions; EIB Innovation Finance Advisory to support the implementation of EU Missions; OECD Benchmarking Study on missions implementation; Informing citizens and stakeholders about EU Missions and engaging them in the implementation of EU Missions; External expertise for advice on the next phases of the design and implementation of missions for Horizon Europe; Scientific and technical services by the Joint Research Centre; Scientific and technical services to the Mission on 'Climate-neutral and smart cities'

Joint Research Centre (JRC):

The Joint Research Centre is the Commission's science and knowledge service. The JRC employs scientists to carry out research in order to provide independent scientific advice and support to EU policy. JRC provides policymakers, both European and national, with independent scientific evidence and support.



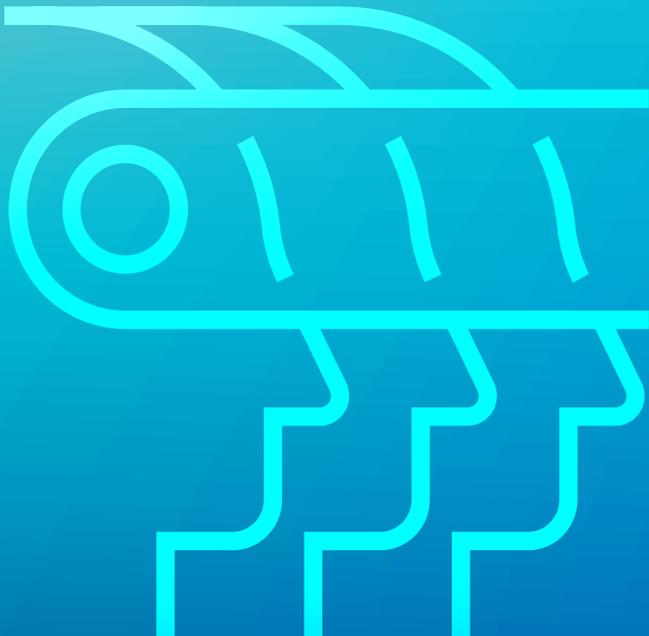
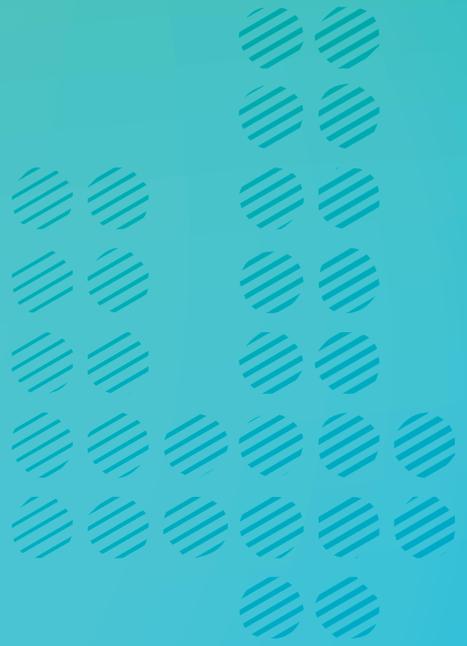
Detailed information about JRC is available at Joint Research Centre:  
[https://ec.europa.eu/info/departments/joint-research-centre\\_en](https://ec.europa.eu/info/departments/joint-research-centre_en)



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**PILLAR 3**  
**Innovative Europe**

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## Stimulating market-creating breakthroughs and ecosystems conducive to innovation

This Innovative Europe pillar, aims to make Europe a frontrunner in market-creating innovation via the European Innovation Council. It also helps to develop the overall EU innovation landscape through the European Institute of Innovation and Technology which fosters integration of the knowledge triangle of education, research and innovation.

- **European Innovation Council (EIC)**

EIC provides integrated, agile support across the full innovation spectrum from **early-stage research to start-up and scale-up**. The funding and support are organized into three main funding schemes with Open and Challenge driven calls.

**EIC Pathfinder** is targeting innovations with **ambitious vision** for radically new technology, with potential to create new markets and/or to address global challenges. Support may be provided for **early-stage** development of such future technologies (e.g. various activities at low Technology Readiness Levels 1-4), based on **high-risk/high-gain science-towards-technology breakthrough research**. This research must provide the foundations of the technology you are envisioning. EIC Pathfinder targets *highly risky innovations, to try things that may not work, rather than incremental innovations and improvements*. Grants of up to EUR 3 million (open) or EUR 4 million (challenge driven) (or more if properly justified) to achieve the proof of principle

and validate the scientific basis of breakthrough technology (TRL 1-4).

**EIC Transition** aims to **validate technologies and develop business plans** for specific applications; Single applicants may apply (SMEs, spin-offs, start-ups, research organisations, universities) or small consortia (2 to 5 partners). Applications **must build on results from eligible Pathfinder, FET or ERC Proof of Concept projects**. Grants of up to EUR 2.5 million (or more if properly justified) to validate and demonstrate technology in application relevant environment (TRL 4 to 5/6) and develop market readiness.

**EIC Accelerator** supports companies (principally start-ups, spin-outs and SMEs, and in exceptional cases small mid-caps) to bring their innovations to market and scale-up. The aim is to scale up high-impact innovations with the potential to create new markets or disrupt existing ones. The EIC Accelerator provides a unique combination of funding from EUR 0.5 to EUR 17.5 million and Business Acceleration Services. The EIC Accelerator is **open to innovations in any field of technology or application**. Particular focus is on *innovations building on scientific discovery or technological breakthroughs*. Support is targeting **the later stages of technology development as well as scale-up**. The technology component of innovation must therefore have been tested and validated in a laboratory or other relevant

environment (e.g. at least Technology Readiness Level 5/6 or higher). The EIC Accelerator is a catalyst to crowd in other investors necessary for the scaleup of the innovation.

**EIC also provides Prizes:** EU Prize for Women Innovators, The European Capital of Innovation Awards (iCapital), The European Innovation Procurement Awards, The European Social Innovation Competition, EIC Community and Business Acceleration Services and EIC Business Acceleration Services global offer.



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• **European Innovation Ecosystems**

Connecting with regional and national innovation actors and supporting the implementation of joint cross-border innovation programmes by the Member States and associated countries, from the enhancement of soft skills for innovation to research and innovation actions, to boost the effectiveness of the European innovation system. This will complement the ERDF support for innovation eco-systems and interregional partnerships around smart specialization topics.

• **European Institute of Innovation and Technology (EIT)**

The European Institute of Innovation



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and Technology is an Agency of the European Union established in 2008 to strengthen Europe’s ability to innovate. The EIT is an integral part of Horizon Europe focusing on integrating research, higher education, business and entrepreneurship.

Strategic Innovation Agenda (SIA) proposed for 2021-2027 ensures alignment with the objectives of Horizon Europe and introduces the following main new features:



Increasing the regional impact of Knowledge and Innovation Communities: EIT will strengthen its networks, involving more higher education institutions, businesses and research organisations by developing regional outreach strategies. The selection of cooperation partners and the preparation of KIC activities will be more inclusive. KICs will also develop links to Smart Specialisation Strategies, an EU initiative to spur economic growth and job creation by enabling each region to identify and develop its own competitive advantages.



Boosting the innovation capacity of higher education: The EIT will support 750 higher education institutions with funding, expertise and coaching, enabling them to develop economic activities within their area of interest. The Institute will design and launch activities particularly in countries with a lower innovation capacity. In doing so, the EIT will build on successful policy initiatives such as HEInnovate, a free self-assessment tool for all types of higher education institutions, or the Regional Innovation Impact Assessment Framework, which allows universities to assess how they are fostering innovation in the regions they are based in.



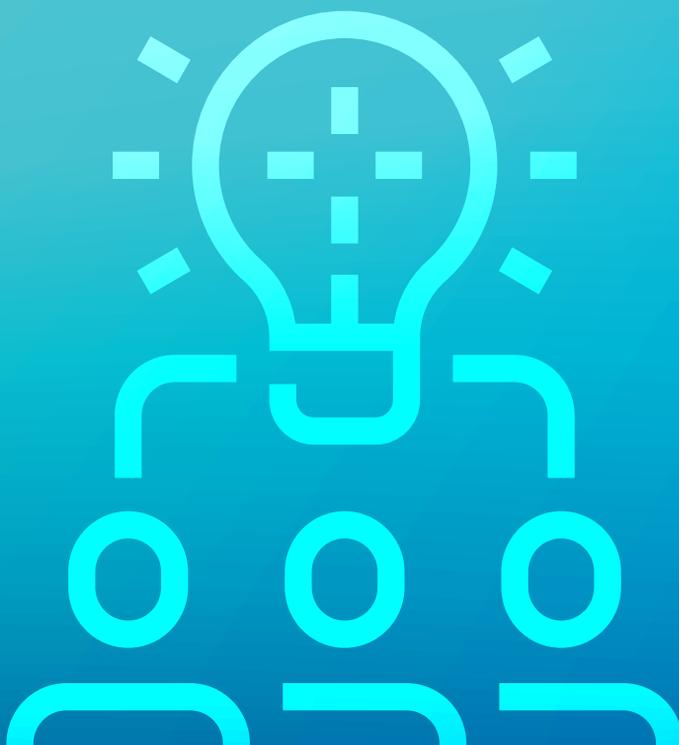
Launch of new KICs: The EIT will launch two new KICs, selected in fields most relevant to Horizon Europe policy priorities. The first new KIC is set to focus on the cultural and creative industries (CCI) and is planned to start in 2022. This sector has a high growth potential, many local grassroots initiatives and strong citizen appeal and is complementary to the existing eight KICs. The priority field of a second new KIC will be decided at a later stage; it is due to be launched in 2025.



Detailed information about EIT is available at: <https://eit.europa.eu/>

**Widening  
Participation and  
Strengthening  
European  
Research Area**

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## Increasing strengths and potential for a more innovative Europe

This Horizontal part of Horizon Europe programme, Widening Participation and Strengthening the European Research Area, will implement concrete measures in support of widening participation in the programme and strengthening the ERA. It will underpin geographical spread, build the necessary capacity to allow successful participation in the R&I process and promote networking of and access to excellence. Synergies will be sought with the programme parts on European Innovation Ecosystems and the European Institute of Innovation & Technology (EIT). Another way of furthering dissemination and exploitation of research results is through reinforcing the interaction between education and research. This programme part will strengthen collaborative links across Europe and open up European R&I networks, contribute to improving research management capacities in the widening countries<sup>3</sup> and Outermost Regions, support national policy reforms as well as exploit the potential of the Union's talent pool by targeted actions.

### • Widening Participation and Spreading Excellence

Concrete measures in support of widening participation and strengthening the ERA include five main calls: Teaming for Excellence, Twinning, Twinning for Western Balkan Countries, Excellence Hubs, Strengthening capacity for excellence in universities.

**Teaming for Excellence** aims to respond to the challenge of **insufficient critical mass of science and**

**lack of centres of excellence having sufficient competence** to engage countries and regions strategically in a path of innovative growth. Teaming has a strong potential to help countries that are increasing their R&I intensity to attain a competitive position in the global value chains, especially by becoming drivers of change. Teaming will support **the creation of new centres of excellence or upgrading the existing ones** in low R&I performing countries, building on partnerships between leading scientific institutions and partner institutions that display the willingness to engage together for this purpose.

**Twinning** aims to **significantly strengthen a defined field of research and enhance networking activities between research institutions of the Widening countries and internationally-leading counterparts at EU level** by linking them 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 proposals will have to **clearly outline the scientific strategy for stepping up and stimulating scientific excellence and innovation capacity** in a defined area of research as well as the scientific quality of the partners involved in the twinning

<sup>3</sup> Less research performing countries eligible for widening support under Horizon Europe

exercise. This scientific strategy should include arrangements for formulating new (or ongoing) joint research project(s) in the scientific area of choice and describe how Twinning will take this research to a new stage, by enlarging its scope and/or the research partnership. If relevant, any links with sustainable development objectives are to be outlined.

**Twining Western Balkans special** - The purpose of the special Twinning call is to raise the bar for excellence of all R&I actors in these countries. It will be implemented as one special call for Western Balkan countries with a limited eligibility for hosting the co-ordinator for the countries Albania, Serbia, Montenegro, Bosnia and Herzegovina, North Macedonia and Kosovo in 2021. This special Twinning aims to enhance networking activities between the research institutions of the Western Balkan countries and internationally leading counterparts at EU level by linking them with at least two research institutions from two different Member States or Associated Countries. Therefore, they will build on the huge potential of networking for excellence through knowledge transfer and exchange of best practices between research institutions and partners.

**Excellence Hubs** are part of the European excellence initiative and they complement the science-oriented schemes Teaming, Twinning, ERA Chairs and the university alliances by a dedicated innovation component. This action is embedded into the broader

European initiative on ERA hubs and will help to bridge the innovation divide in this context. It responds to the third priority in the ERA communication on translating R&I results into the economy and especially that R&I policies should aim at boosting the resilience and competitiveness of our economies and societies. This means ensuring Europe's competitive leadership in the global race for technology while improving the environment for business R&I investment, deployment of new technologies and enhancing the take up and visibility of research results in the economy and society as a whole. Unlike Teaming projects that are centred around a single beneficiary, Excellence hubs are partnerships of place-based innovation ecosystems in expanding the number of countries involving larger communities of actors in a regional context based on the quadruple helix principle. To a limited extent, participants from other EU member states, associated countries and international cooperation partners may join in duly justified cases e.g. in case that specific expertise is needed or the involvement in a relevant value adding chain.

### **Strengthening capacity for excellence in universities and surrounding ecosystems**

The capacity building towards the European Excellence Initiative aims to significantly strengthen cooperation between at least two organisations from academic sector in a Widening country (or different Widening countries), by linking them with at least two internationally-leading institutions from two different Member States or Associated Countries.

- Attracting and mobilising the best talents

Two Calls will help to make further progress on the free circulation of knowledge in an upgraded, efficient and effective R&I system. The intervention points are both at the level of individual researchers e.g. helping to develop the skills that researchers need for excellent science and, connect all actors across Europe and at the level of institutions and smaller research groups around future ERA Chair holders.

### ERA Chairs

Progress towards more and better links between research and innovation actors across European Research Area and beyond is a requirement if Europe as a whole is to capitalise on excellence from across the continent. To foster brain circulation for researchers and innovators the intervention point of the ERA Chairs actions is attracting in a sustainable manner outstanding scientists and innovators to universities or research organisations in catching up countries and regions. This measure of “brain gain” and creation of pockets of excellence will impact on the culture and performance of host institutions. *The leadership of the ERA Chair holder and the creation of a permanent and excellent research group in the chosen scientific field will ensure excellence, visibility and better integration in the European Research Area, as well as fostering competitiveness in research funding and promoting institutional reforms aligned with ERA priorities.* Research organisations located in widening countries interested in establishing an ERA Chair shall submit a proposal with the prospective ERA Chair holder who should be an outstanding researcher and/or innovator in the chosen scientific domain.

### Fostering balanced brain circulation

Brain Circulation Grants aim to attract more R&I talents to host organizations in widening countries. The action will support mobility of a diverse audience of early career and experienced R&I talents, such as research infrastructure experts and operators, science managers, R&I facilitators such as data stewards and knowledge brokers, researchers in business sector, starting entrepreneurs, moving or returning to host organizations in widening countries.



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- Reforming and enhancing the EU Research and Innovation system

The Horizon Europe intervention area on Reforming and Enhancing the EU Research and Innovation System seeks to facilitate the implementation of concrete measures to support the strengthening of the European Research Area.

The overall objective is to support the development of a European Research Area where knowledge and highly skilled workforce circulate freely; where research outputs are shared rapidly and efficiently; where researchers benefit from attractive careers and gender equality is assured; where common strategic research agendas are aligned to national plans and where the outcomes of research and innovation are understood, and trusted, by informed citizens and benefit society. While fully in line with the Horizon Europe legislative act, the envisaged activities also underpin the direction of the forthcoming European Research Area

Communication regarding directionality, inclusiveness and connectivity.

Under this destination, [policy reforms at national level will be mutually reinforced and complemented through the development of EU-level policy initiatives, research, networking, partnering, coordination, data collection and monitoring and evaluation](#). Concrete measures will be implemented to support the strengthening of the European Research Area in order to maximize the impact of European research and innovation worldwide during Horizon Europe.

Examples of main Calls/Topics include:

Support for policy makers – Programme level collaboration between national R&I programmes, Improving access to excellence, Support for R&I policy making in the Western Balkans, Translating R&I results into the economy, Protection of Higher Education Institutions and research organisations against conventional and non-conventional threats, Acceleration Services in support of the institutional transformation, of Higher Education Institutions, Supporting the transition to Open Access of publishing activities of scholarly societies, Support to changes in the assessment of research and researchers to reward the practice of open science, Doctoral training for an open and responsible practice of research and innovation, A capacity-building and brokering network to make citizen science an integral part of the European Research Area, Kick-starting and making citizen science initiatives sustainable in the European Research Area, Trust of society in science, research and innovation, Developing a STE(A)M roadmap for Science Education in Horizon Europe, Centre of excellence on inclusive gender equality

in Research & Innovation, Translating R&I results into the economy, Testing of the ERA Hub concept – pilot phase, Innnowide Bridging Facility, An experimentation space for the uptake and use of R&I results for EU Resilience and future preparedness, Deepening the European Research Area, institutional transformation of Higher Education Institutions, Increasing the reproducibility of research results, Developing and piloting researcher training on science communication, public engagement, and citizen science, Inclusion schemes linking leading research institutions in terms of gender equality plan implementation to less advanced research organisations, The Ethics of Environmental Research, The empirical and behavioural approach to research ethics and integrity.



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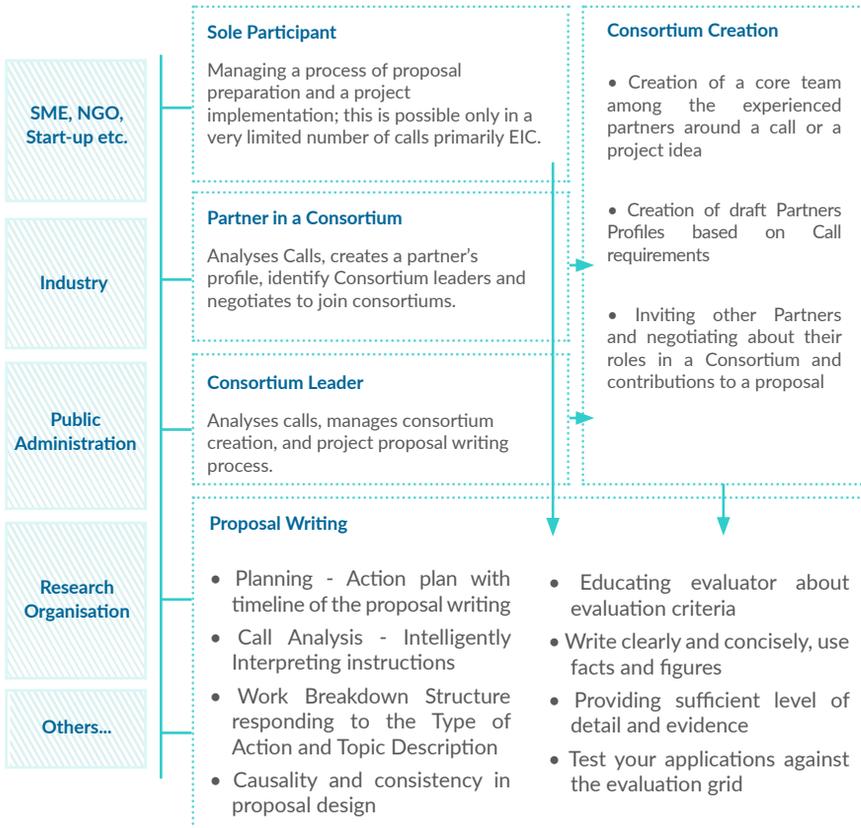
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# Identifying the Suitable Call - Call Analysis, Your Role in the Project

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Picture: Understanding differences among the three most common roles

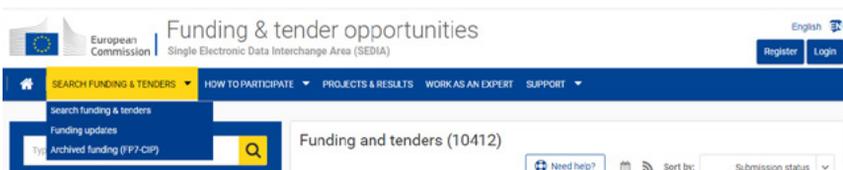
Choosing the correct call/topic is about the right fit of the organization's interests within the available call/topic opportunities and constraints. Horizon Europe offers a wide variety of funding opportunities for research and innovation activities through calls for proposals.

The Funding & Tender Opportunities Portal provides a **Search** option based on

the text of the call and topic titles, call and topic identifiers, topic description, keywords and tags related to this topic.

**The Funding & Tender Opportunities Portal – Search**

 [Link: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-search](https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-search)



You can also filter results using the quick finder for topics related to Horizon Europe cross-cutting priorities, such as international cooperation, SME instrument, social sciences and humanities, etc. Good practice is to use previous (closed) topics, as a guide.

Understanding differences among the three most common roles of participants in Horizon Europe is the first step towards successful fundraising and avoiding confusion while reading open calls. An organisation can take part in Horizon Europe by choosing one of the three main roles, while opportunities for individuals are also presented where possible.



#### Project leader with no other partners (Sole Participant)

Project leader of a project with only one participating organization, and no other partners, is rarely possible throughout Horizon Europe. [EIC Accelerator offers this possibility](#) for Single Start-ups and SMEs (including spin-outs), individuals (intending to launch a start-up/SME) and in exceptional cases small mid-caps<sup>4</sup> (fewer than 500 employees); [EIC Transition offers this possibility](#) as an option: Single applicants (SMEs, spin-offs, start-ups, research organizations, universities), though small consortia (two to 5 partners) are welcome. Yet, for EIC Transition applications must build on results from eligible Pathfinder, FET or ERC Proof of Concept projects.



#### Consortium Leader in a consortium with other Partners

For organizations to embark on a *consortium leader role in projects with other partners*, adequate management and financial capacity is required. A consortium is a group made up of two or more organizations, that work together to achieve project objectives. Consortium leader is responsible for project management, including coordination, monitoring and controlling of other Partners, as well as communication with the contracting authority, typically the European Commission. The majority of calls in Horizon Europe require small or large consortiums to apply for projects, for over 90% of the programme calls. Consortium sizes significantly vary based on the type of action (RIA, IA, CSA etc.) and may include diverse partners (Academia, R&D, Industry, SME, NGO, etc) depending on the call requirements. Consortium leader's role requires sufficient experience in managing EU-funded projects. Therefore, it is possible only for organisations with appropriate size, management and financial capacity as well as previous experience.

Strengthening consortium leader's capacity is possible by involving highly specialized project management companies, dedicated partners for some managerial tasks and/or assigning a deputy co-ordinator role among partners. Yet, these organizational arrangements are suitable only if a Consortium Leader can justify *why is such a consortium the best possible solution to achieve expected outcomes of the call/topic*. In the highly competitive arena of Horizon Europe, the quality of consortium is critically important.

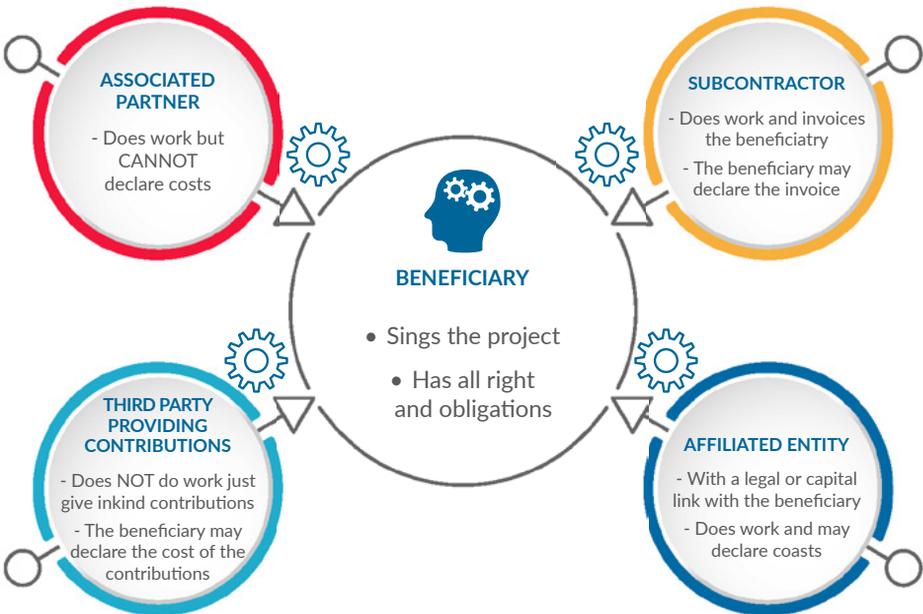
<sup>4</sup> Mid-cap is the term given to companies with a market cap (capitalization)—or market value—between 2 and 10 billion \$. However, EU does use this definition and mid-caps are considered broadly said to have between 250 and 3000 employees

 Partner in a Consortium

The majority of participants in the Horizon Europe programme are partners in project Consortia. Partners may be responsible for managing Work Packages, Tasks or assisting in Task implementation within a project. Ideally, partners are responsible for activities that advance their own organizational development agenda. Each partner needs to provide credible justification for its role and responsibilities, why it has been included in a consortium. In Horizon

Europe, a ‘partner’ may be any legal entity - any organization that is legally registered. This includes research centres, universities, enterprises, non-governmental organisations etc. The European Commission only signs contracts with legal entities.

Once the consortium leader and partners sign the Grant Agreement, they become Beneficiaries. Other possible roles are explained in the picture below.



Picture: Possible roles of applicants

Joining projects to learn more about Horizon Europe and build credibility is often useful, for example, as third party, associated partner, subcontractor and observer. Partners in the Consortium sometimes need support to implement certain tasks, e.g. an additional service or resources of a third party.

There are several possibilities how you can be included. Subcontracts can deliver some smaller services (printing flyer, catering, event management etc.). Third parties can be included based on in-kind contributions against payment or free of charge (i.e. Secondment of employees, Providing lab space). Associated Partners contribute to more relevant project activities, (i.e. applied research, testing, meetings, workshops, reports in thematic areas).

In general, entities performing a substantial part of the work (i.e. project task leaders) should be beneficiaries and not linked third parties, with some exceptions.

So-called ‘hop-on’ calls are envisaged for entities from widening countries to join already selected collaborative projects. This lowers entry barriers into Horizon Europe and provides an opportunity to excel. Hop-on and sub-granting calls and subcontracting tenders are published by ongoing projects, usually on project websites.

Example for a request for associated partners from the ongoing ARCADE project: “Associated Partners can participate and contribute content in relevant ARCADE activities, i.e. meetings and workshops, reports, and position papers in thematic areas. Their contributions are provided on a voluntary basis without the possibility to claim funding from the European Commission. However, Associated Partners are eligible for EU funding under specific conditions.”



*Example for a request for associated partners from the ongoing ARCADE project: “Associated Partners can participate and contribute content in relevant ARCADE activities, i.e. meetings and workshops, reports, and position papers in thematic areas. Their contributions are provided on a voluntary basis without the possibility to claim funding from the European Commission. However, Associated Partners are eligible for EU funding under specific conditions.”*



Example request for associated partnerships, Link:

<https://www.connectedautomateddriving.eu/>

The second criterion for identifying the suitable call/topic: organizations need to consider differences of the [top-down or bottom-up approach](#) of the call/topics in Horizon Europe. Top-down grants have specific pre-determined topics and outcomes. Top-down calls are 70-80% of the Horizon Europe grants (research and innovation actions, Innovation actions, Coordination and support actions) and some EIC Challenges.

In Bottom-up grants any topic is welcome, but not all proposals may be scored highly on all evaluation criteria to get funded. Particularly the “relevance” of proposed bottom-up topics is among the most common pitfalls. Bottom-up grants are open for participants to nominate topics that can achieve call outcomes and impacts. Bottom-up calls are EIC Open (for SMEs mostly), ERC (Academia only) and MSCA (mostly for Academia).

## Call Analysis – What should you look for?

The first question is: “Am I eligible?” Horizon Europe has different types of calls, each with varying requirements. For Research Innovation Action (RIA), Innovation Action and Coordination and support actions (CSA) [all European and Associated countries legal entities are eligible to apply](#). For these calls, normally an academic partner is required to lead a consortium.

As the result of your Search, you will find the Topic Page where you can read:

### General information:

What is [relevant information for proposers](#)? Programme, Work Programme, Call, Type of Action, Type of Grant Agreement, Opening date, Deadline model, Deadline dates.

Type of Action gives you insights about eligible activities and funding rates. For example, common types of actions are: Research and Innovation Action, Innovation Action, Coordination and Support Action, Programme co-fund actions, Innovation and market deployment actions, Training and mobility actions, Pre-commercial procurement

actions, Public procurement of innovative solutions actions.

The three most common types of actions are:

**RIA – Research and Innovation Action** primarily consisting of activities aiming to establish new knowledge and/or to explore the feasibility of new or improved technology, product, process, service or solution. For this purpose, they may include basic and applied research, technology development and integration, testing and validation on a small-scale prototype in a laboratory or simulated environment. Projects may contain closely connected but limited demonstration or pilot activities aiming to show technical feasibility in a near to operational environment. 45 pages proposal. Funding rate: 100%

**IA – Innovation actions** primarily consisting of activities directly aimed at producing plans and arrangements or designs for new, altered or improved products, processes or services. For this purpose, they

may include prototyping, testing, demonstrating, piloting, large-scale product validation and market replication. A 'demonstration or pilot' aims to validate the technical and economic viability of a new or improved technology, product, process, service or solution. A 'market replication' aims to support the first application/deployment in the market. Projects may include limited research and development activities. 45 pages proposal. Funding rate: 70% (except for non-profit legal entities, where a rate of 100% applies).

**CSA - Coordination and Support Actions** consisting primarily of accompanying measures such as standardization, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogues and mutual learning exercises and studies, including design studies for new infrastructure and may also include complementary activities of strategic planning, networking and coordination between programmes in different countries. 30 pages proposal. Funding rate: 100%

about what consortium members should be included is described in the scope, or if a collaboration should be built with specific organizations or previously funded projects. The Scope gives information on what you are expected to do (by the consortium) during the project lifecycle.

Analysis of the Scope provides you information on what activities, expertise and resources are necessary for a successful proposal. Hence, the majority of participants aiming to become Partners in a consortium should be analysing carefully, "Can you contribute to the implementation of some of the expected activities?" specified in the scope. In addition, "Do you have the necessary experience, expertise, resources, reach, access to stakeholders and sim?" which are required.

The Expected Outcomes and Impact describes the envisioned results from the project once executed. It provides a more detailed description which is to the point and more specific, compared to the scope description. Participants aiming to become partners in consortiums should be analysing Outcomes and Impacts by asking themselves a question: "Can you provide added value to ensure that the expected Outcomes and Impacts are achieved?"



Attention: You should read and analyse calls/topics as most types of actions are highly customized.

**Topic description** provides the most important information to decide about your participation in a call and your possible role. A call text describes all the information that needs to be included in a project proposal. Reading it in full detail and **increase your chances of getting funded.**

The **Scope** gives information on how the European Committee would see the challenge solved, which topics should be addressed, or what type of activities should be performed. Also, the information



Picture: The process of deciding on your role in the Consortium

When you identify your potential role after analysing Scope, Outcomes and Impacts, read [Topic conditions](#), [Call document](#) and [annexes](#): Guide for Applicants, Frequently Asked Questions (FAQs), EU Financial Regulation, Rules for Legal Entity Validation, LEAR Appointment and Financial Capacity Assessment, Funding & Tender Opportunities Portal Online Manual.

### Practical Example for Call Analysis:

*Let's assume your first choice was to type "social networks" (as it is a very popular topic) in Funding & Tender Opportunities Portal Search and get as a result following Topic description:*

#### *HORIZON-CL2-2022-DEMOCRA-CY-01-07: Politics and the impact of online social networks and new media*

Firstly, you can notice the estimated EU contribution "The EU estimates that an EU contribution of between EUR 2 and 3 million would allow these outcomes to be addressed appropriately". The overall indicative Budget for this Topic is: "The total indicative budget for the topic is EUR 9million". It is therefore reasonable to expect that more than one proposal may be funded, given that their requested contribution is between 2-3 million and the indicative budget remains unchanged by the time the call is published.

Next, you can see as the Type of Action, for this topic it is stated "Research and Innovation Actions". If you look at the definition of the RIA you can see it consists of [activities](#) that aim to establish new knowledge and/or to [explore the feasibility](#) of new or improved technology, product, process, service or solution. For this purpose, they may include [basic and applied research](#), [technology development and integration](#), [testing and validation](#) on a [small-scale prototype](#) in a laboratory or simulated environment. Projects may contain closely connected but limited

[demonstration or pilot activities](#) that aim to [show technical feasibility in a near to operational environment](#). 45 pages proposal. Funding rate: 100%

At this point you have hints about proposal budget, funding rate, recommended activities and you can already find some models of previously funded RIA projects with a budget between 2-3 million to get an orientation about the consortium size, work-breakdown structure and partners profiles.

However, the key to a proper call analysis is to read and analyse [all reference documents](#) and intelligently interpret every word.

Next step is to analyse the Scope:

- ✔ Scope: Social media and other internet-based platforms are intertwined with political life. They play an important role in allowing people to design, consume and share political news, seek political information and discuss, make decisions, donate money, or engage with political parties and other organisations.
- ✔ Furthermore, these platforms and media are supposed to open new avenues to political engagement and democratic participation. However, developments in the recent past have created [anxieties about their capacity to protect citizens from disinformation](#) and to serve as [balanced and open public forum for democratic debates](#).
- ✔ Social platforms and new media are increasingly perceived as conducive to the [creation of ideological "echo-chambers"](#) eroding the space for public dialogue.
- ✔ They are seen as fostering polarisation, radicalisation, depoliticisation, spreading misinformation and subject to manipulation. At

the same time, they have been instrumentalised in attempts to covertly influence the political choices of citizens, thus sapping their democratic credentials.

The above text marked in colour provides relevant background information which the EC considers to be important. The coloured parts of the text below provide more information which activities are expected in the proposal, what kind of expertise is needed, capabilities, access or resources and how to achieve expected outcomes.

- ✔ Proposals are expected to address the following: Build Europe-wide evidence on the extent to which political opportunities and information offered by platforms and new media – and resulting impacts, such as the “echo-chambers” effect – affects political attitudes in European states and at the level of the EU and its neighbourhood.

Hence, this indicates that large-scale data gathering and analysis are necessary, for the major platforms and new media, on a European wide scale including neighbourhood. Apparently, organizations with capabilities to gather and analyse data on these platforms and new media are necessary as partners in the consortium. Possibly also those who have designed social network campaigns and measured their impacts.

- ✔ Assess whether and how new media functions as a new level of news selection and study the resulting perception biases with citizens.
- ✔ Examine the extent to which platforms and new media actually help democratise political systems and offer avenues of active engagement, or hinder participation for some.

- ✔ Examine the effects of the replacement of media consumption with content consumption.
- ✔ Investigate how audiences of different age, different gender and different socio-economic and ethnolinguistic group receive and assess information on digital platforms, and how political actors use these platforms to shape political behaviour.

So far, the instructions provided, indicate draft “work packages” of a proposal and provide more information about the capabilities of partners. All activities are, so far, “activities aiming to establish new knowledge” and will be “basic and applied research” following RIA instructions. Apparently, investigation of “audiences of different age, different gender...” will also require to involve specified stakeholders, either directly, or using specialized partners with a proven track record in this type of investigations.

By this point, the text of the Scope provided instructions that mostly indicate what kind of research is needed. As RIA definition states “explore the feasibility of new or improved technology, product, process, service or solution... technology development and integration, testing and validation”, a concrete request for “regulatory solutions, enhancing capacities, (including media education, media competencies, and digital literacy) etc.” follows.

- ✔ Propose and design regulatory innovations in response to the covert instrumentalization of social platforms for political goals.
- ✔ Develop evidence-based approaches and methods for enhancing capacities for digital citizenship, including media education, media competences, and digital literacy.

- ✓ Attain insight about the effects of social media on social behaviour.
- ✓ Citizen science and other innovative and participatory forms of research could be appropriate for this action.

Lastly, we must carefully examine the Expected Outcome:

- Understand the changes wrought on democratic processes by new technologies.
- Produce evidence-based recommendations to address the opportunities and challenges for political behaviour and democratic engagement presented by social platforms and new media.
- Enhance capacities for digital citizenship

Based on the Topic Description, core consortium partners seem to be required to analyse big data, from major social platforms and new media, consequently probably developed AI and supercomputing capabilities and already involved in campaigns on social networks and new media. Methodologically, a sufficient number of representative case studies may replace an all-encompassing study.

It is unlikely that the EC would consider newcomers as credible to lead a consortium, so the first place to look for project models is among consortium leaders of previous RIA actions and their (“social platforms and new media”) Industry partners.

- Some of the corresponding projects based on initial search reveal “who are Research and Innovation and Industry Leaders” already funded by the EC:



Link: <https://cordis.europa.eu/project/id/723014>  
 Link: <https://cordis.europa.eu/project/id/688722>  
 Link: <https://cordis.europa.eu/project/id/688241>

- Also, some of the key actors already doing research about citizens perceptions:



Link: <https://cordis.europa.eu/project/id/822590>

- As well as, co-creation of solutions to combat misinformation:



Link: <https://cordis.europa.eu/project/id/770302>

Key intelligence is to breakdown the work for this Topic, besides Project Management Work Package (WP). The next WPs would focus on research requirements from the Scope text and result in innovative solutions WPs:

- WP: How political actors use new platforms
- WP: How new media affects news selection and perception biases with citizens
- WP: Effects of content consumption on different audiences and social behaviour
- WP: Effects on political systems

- WP: Development of new evidence-based approaches and methods
- WP: Designing regulatory innovations
- WP: Enhancing capacities (media education, media competencies and digital literacy).



*WBS and the resulting printer's matrix will be significantly different for different types of actions!*

Of course, this is just an example and exercise and WBS (Work Breakdown Structure) and WPs will be refined and advanced by experts considering listed Outcomes and Impacts. However, using logical thinking anyone [interested to participate can, and should create a draft WBS for an open call/topic of interest.](#)

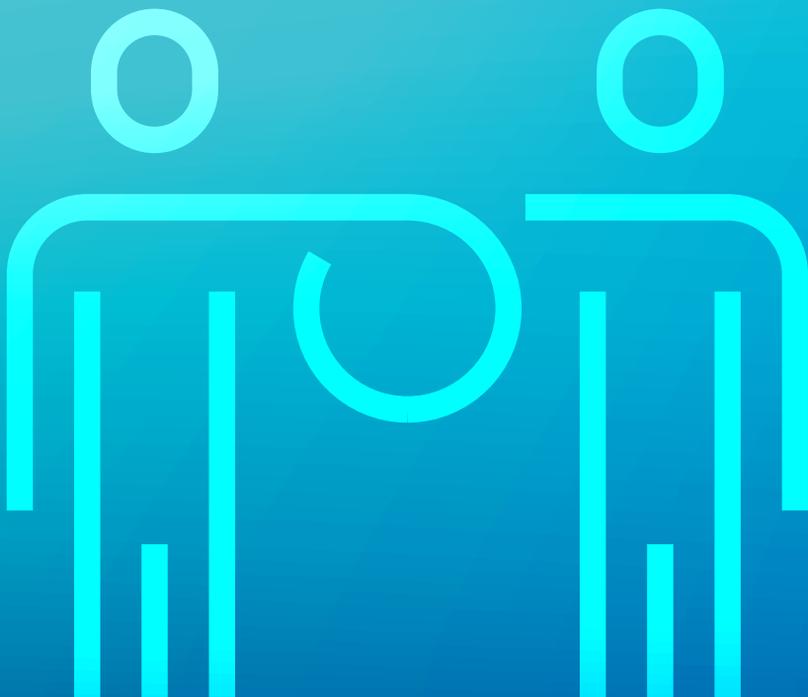
[Why is the creation of draft WBS during the call analysis critically important?](#)

To understand Activities, Expertise, Resources needed and identify if and how can you contribute to a call/topic! So, the next question is whether you have relevant [expertise or whether you can bring added value](#) to implement activities within draft WBS and help the consortium achieve expected Outcomes. With a draft WBS you have a deeper insight about necessary expertise: *i.e. [How political actors use new platforms or How new content consumption on social media affects different audiences \(and their social behaviour\)](#)*. If you have capabilities for data gathering, data analysis, you know what the key variables are, you have access to stakeholders, case studies, target audience, necessary infrastructure, or experience in the design of new regulatory tools, or enhancing capacities *like media education, competences, and digital literacy* etc. that would become the basis for your participation in a consortium and negotiations about your role and your contribution to a proposal design.

Hence, the Call analysis is a critical first step for participation. Some types of action, such as EIC Accelerator, are designed for a sole applicant (SMEs primarily). ERC is focused on scientific excellence and driven by researchers. "Doctoral Networks", despite immediate intuitive conclusions, may include industry and SMEs. Similarly, in Teaming, Twinning, ERA Chair etc. you have to start from call analysis and project models.

# Consortium Creation - Consortium Leader and Partners

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Consortium creation for Horizon Europe calls starts as soon as the **draft Work Programmes** are published. The most experienced participants contribute to refining the Topics during *stakeholder consultations* and as soon as the drafts are available, partner search commences. Based on the Call/Topic analysis participants can create an initial draft work breakdown structure (WBS) for each call, describing the expertise matrix and partners profiles. The essence of call analysis is analytical reading and intelligent interpretation of the call text in order to identify “what is needed”

i.e. necessary expertise, activities, infrastructure, or other resources, to achieve call/topic outcomes. Based on the call analysis initial WBS and core partner profiles are created.

The next step is to identify **the best partners** which fit the profile. These are normally leaders in their respective fields. Consortium leaders and experienced participants embark on initial discussions about possible cooperation for specific calls as early as possible.



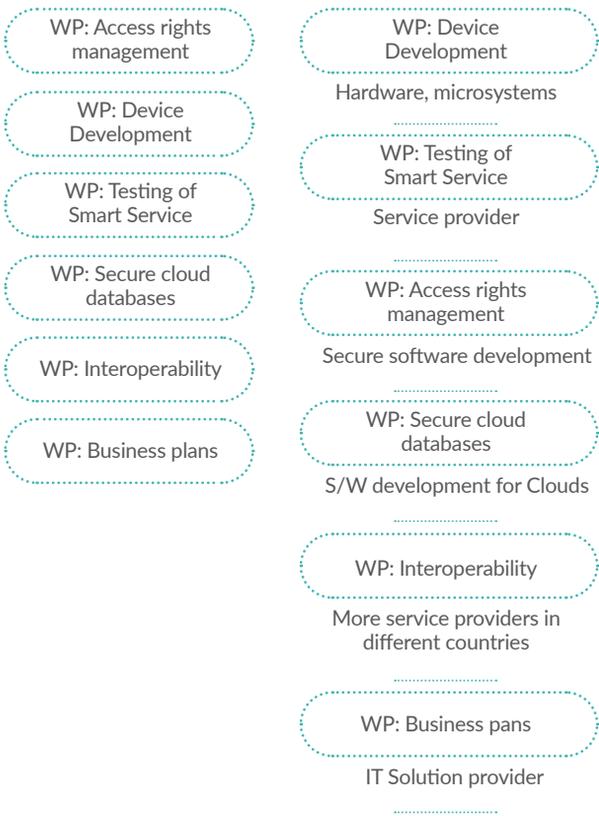
**Simple examples of call/topic analysis:**

The focus is on the **development and testing** of usable, economic and privacy preserving **access control platforms** based on the use of biometrics, smart cards, or other devices.

The solutions are to be installed and tested in a **broadband network, giving access to smart services** running over networks with state-of-the-art security, avoiding single points of failure.

Proposed work should include the management of the **access rights** in particular for the service providers, ensure the **security and privacy** of the databases, facilitate a **timely breach notification** and remediation to the user, and reduce the insider threat.

The proposed solutions have to guarantee **interoperability and portability** between systems and services, sparing the user to have to install a platform, service or country specific technology.



Picture: Consortium creation process

A strong consortium has the following characteristics:

✔ **Complementarity.** Each partner should have a unique role and bring in a special, required expertise or technology (academia, industry, SMEs). Combine different roles and expertise to ensure that you are able to achieve all expected outcomes/impacts and avoid redundancy.

✔ **Interdisciplinarity.** To tackle complex call/topic challenges and achieve expected impacts, collaborations need to connect interdisciplinary and intersectoral expertise and capabilities. **Combining partners from all disciplines and sectors** (necessary to achieve expected outcomes/impacts) is essential.

✔ **Balance.** Think about aspects such as geographical spread in the EU, a balance between profit, non-profit partners, public, private, governments, non-governmental organizations, large businesses, mid-caps and SMEs and gender balance of key people involved.

✔ **Excellence.** A strong consortium brings together the brightest minds in various key disciplines. Therefore, identify the leaders among topic areas, and make a compilation of outstanding organisations in charge of each project task. Choose the best partners.

Effective ways for partner search:

✔ **Partner Search tool available at the Funding & Tender Opportunities Portal**



Link: <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/partner-search>

✔ **European Enterprise Network offers support for partner search**



Link: <https://een.ec.europa.eu/>

✔ **Info Days, Brokerage and Match-making events**



Link: [https://ec.europa.eu/info/events\\_en](https://ec.europa.eu/info/events_en)

The most effective way to find partners is to

✔ **Analyse recently finished and ongoing projects**

using Cordis or Projects and Results search at the Funding & Tender Opportunities Portal



Link: <https://cordis.europa.eu/>

For the majority of participants, it is not possible to embark on the project coordinator's role due to insufficient management and financial capacity. Consequently, for this majority of participants, it is critical to **present themselves to possible consortium leaders** in such a way, **to get invitations to join consortiums** as partners in the early stages, while the project proposal is in the design phase.

Effective communication with consortium leaders requires the participants to create a Partner Profile: in a nutshell, it is your presentation formatted for the call requirements and description of your prospective role as partner. Partner Profile is created using two sets of instructions: justification for partners required in project proposal template; and call analysis, more specifically, presentation of the "added value" you may bring as partner to advance project cost vs. impact ratio.

For the Partners Profile development, you should present briefly: mission, vision, objectives, expertise, human resources and infrastructure, recent success stories, previous experience in EU-funded projects, the topic of interest in Horizon Europe and roles as a partner.

To create the most effective Partner Profile, information should be adjusted for the call, responding to specific wording and phrases, and emphasize the added value for the consortium.

Careful planning of communication and relationship building with consortium leaders prevents failures. Identification of the best possible consortium leaders requires that you analyse recently finished and ongoing H2020/Europe projects, and select senior experts with sufficient experience in H2020/Europe project coordination in your fields of interest. Therefore, you need to analyse the personal track record of those who you intend to contact, and you should be well informed about their interests.



**NVO NATURA, Kolašin**  
Centar za promociju održivog razvoja  
The Center for promotion of the Sustainable Development

**NGO Natura mission** is boosting the efficient use of resources by moving to a clean, circular economy, restoring biodiversity and cutting pollution. Through applied research, innovation and policy advancements of energy efficiency, ecology, and resilience to climate changes, Natura is leading socioeconomic transformation of the South-Eastern Europe into a circular economy.

**Natura Expertise and Resources:** : Natura has a full-time staff of 3 senior experts, part-time staff of 12 experts and ESRs and capacity to mobilize over 120 volunteers for projects and case studies. Natura has a head office (40m2) with all necessary equipment (computers, fax, internet and copier) and numerous local offices in member organizations. On a daily basis Natura' team is providing hands-on support to key stakeholders in SEE ranging from local governments to entrepreneurs, startups, NGOs SMEs, to multinational industry leaders to academia, in **project development and implementation**. We are unique and vibrant multi-disciplinary expert network spanning across governments, industry, NGOs and academia. We are a trusted and strategic partner of the Faculty of Economy in Podgorica, the Ministry of Environment and Spatial Planning, the Ministry of Tourism, the Institute for Nature Protection of Montenegro, the Natural History Museum, the Institute of Biotechnology, the National Park "Biogradska Gora", Employment Agency of Montenegro, and many industry leaders.

**Achievements: Natura implemented numerous EU, national and internally funded projects** i.e.: the Regional Advocacy Centre (RAC) programme; Kolašin Tourist Economy; Eco-campaign "Not Tomorrow, Let us Begin Right Now!"; Watchdog project to monitor the implementation of the Law on local self-governance for citizens' participation in the decision making processes; Protecting the ecosystems of the Tara and Moraca Rivers; The Comparative analysis of the regional development with special focus on the northern region, and disproportion and underdevelopment of the northern region; The analysis of possible influences of the hydroelectric power station Buk Bijela on the meteorological parameters in Montenegro; Establishing the Center for Sustainable Development Promotion; Protection and Promotion of Flora on Mountains Bjelasica, Sinjavina and Komovi; Catalogue of the Botanical Garden in Kolašin; 'Everything That Concerns Your Municipality, Concerns You, as well'; The Regional Environment Center (REC); Public Works project in cooperation with the Employment Bureau of Montenegro; EU Info Bus; Joint Action for Sustainable Employment; Green economy for sustainable development, 'With cooperation and dialogue to better local governance, On job Training and Employment of Persons with Disabilities; Ecological city in ecologic state; Joint money-joint responsibility; Green entrepreneurs for sustainable development; Medicinal herbs - connecting science, nature and business etc.

**Our usual roles as the project partner cover:** project development, information gathering and analysis, education and training, applied research, pilot projects, technology transfer, stakeholder analysis and management, market analysis, leading innovation process, policy monitoring and advancements.

**We are actively working on several Horizon Topics and we interested in partnerships for: Behavioral, social and cultural change for the Green Deal; Demonstration of systemic solutions for the territorial deployment of the circular economy; Restoring biodiversity and ecosystem services; Testing and demonstrating systemic innovations in support of the Farm-to-Fork Strategy; Preventing and fighting extreme wildfires with the integration and demonstration of innovative means.**

**Lastly, we would welcome proposals for cooperation on Horizon Europe topics!**

**NVO NATURA**, Dunje Đokić bb,81210 Kolašin,Crna Gora [natura@t-com.me](mailto:natura@t-com.me)

Picture: Examples of Partner Profiles



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ČIKOM is leading the digital transformation of Montenegro as a research-intensive SME and innovation leader since 1993. Our vision is maximising connection of the human and digital world and a mission to ensure competitiveness and the capacity of stakeholders to address the global challenges ahead.

ČIKOM is the biggest ICT company in Montenegro with 64 highly qualified full-time experts and a vibrant network of external consultants. Our regular services include a wide spectrum of products and services from equipment supply to system integration and implementation of the most complex ICT solutions. We are providing, design, developing, prototyping, testing, customization of various hardware and software solutions their integration and implementation throughout the value chains. We ensure value-chain evolutions crucial for engaging end-users and their behavioural change through information, training, consulting, project management, and transfer of knowledge.

**Expertise:** ČIKOM provides high-end technology in hardware systems, produced by the leading world IT companies, and creates unique systems of these units, making them more efficient for the specific software implementation in a variety of sectors like industry, banking, government, SME, tourism, and education. We offer a 24/7 maintenance system.

ČIKOM has a renowned network of partners including Microsoft (Gold Certified Partner) with competences for Gold Datacentre, Silver Collaboration and Content, Silver Data Analytics, Silver Messaging, Silver Project and Portfolio Management, Silver Small and Midmarket Cloud Solutions; HPE Platinum Partner Ready Solution Provider, Services Delivery partner; Software Defined Infrastructure - VMware & Hyper-V Virtualization; Aruba Network Solution Provider and Silver Partner; Dell-EMC Gold Solution Provider; Cisco Systems Premier Certified Partner; Ruckus Networking Solution Provider in the CommScope PartnerPRO Network; Check Point 3-Star Partner; ASI - Accredited Systems Integrator and ASP - Accredited Service Partner of Allied Telesis and Gold Solution Partner; Avigilon Certified Solution Provider; Rittal IT Channel Partner; Reichle & De-Massarli Authorized QPP-Partner; VMware Partner Connect Advanced; Veeam Silver Partner; Symantec Secure One Gold Partner; Lexmark Accredited Service Partner. As well as ECDL partner centre and Microsoft learning partner. ČIKOM has knowledge, certificates, and experience to meet national and international standards: ISO 9001 quality certification, ITIL v3, ISO 27001 Information security management certificate and ISO 20000 Service Management System certificate.

ČIKOM implacable track record included the successful implementation of the most critical and significant ICT projects in Montenegro: e-DMS (Electronic Document Management system) for Government Montenegro, based on the EMC Documentum platform; On-line Meetings Government of Montenegro (Electronic Meetings); E-Gov. Solution network security, servers and storage infrastructure for Municipalities in Montenegro Podgorica, Bar, Pljevlja, Herceg Novi, Kotor, Budva etc; Government of Montenegro Infrastructure Services based on Microsoft technologies; Tax Administration delivery and installation HA Data centre, network security, servers and storage infrastructure; Central bank of Montenegro as well as Hipotekarna Bank, Ziraat Bank - Servers, Storages and network infrastructure in Primary and DR datacentres; Same se Iberostar Bellevue Montenegro; Electric Transmission System of Montenegro; Civil Aviation Agency of Montenegro; Podgorica Capital City; Montenegro Telecom AD; Sava Montenegro Assurance Company AD, Cold Mine AD Pljevlja; Municipality Budva, Bar, Pljevlja; Port of Adria AD Bar; MAN optical infrastructure. Video surveillance system on open area. Enterprise WiFi infrastructure on open area; Montenegrin Power Distribution System LLC, Primary location server room with delivery and installation of Storage and server's equipment and delivery services; National Public Service - Radio and Television of Montenegro, delivery of DC equipment and services in process of Modernization of Technological capacities of RTCG; One & Only Porto Novi resort village – Kumbor Herceg Novi, delivery and installation of HPE server and storage equipment, Aruba network equipment, Ruckus WiFi equipment and services; Ministry of Interior of Montenegro - Safe City Project - Video surveillance of the Cities of Podgorica, Bar, Budva; Montenegrin National Security Agency - Delivery and installation of equipment for network security, servers and storage infrastructure, video surveillance, access control, alarm, fire and monitoring; Implementation of DMS system (Document Management System) for Municipalities of Budva, Pljevlja, Bar, Herceg Novi, Montenegro State Audit Institution, Montenegro Electrical Transmission System also with ERP (Enterprise Resources Planning) systems; Implementation of system for electronic evidence of quests with the integration of MUP service RB90 for Tourist organizations of the municipalities of Kotor, Herceg Novi, Žabljak; Ministry of Sustainable Development and Tourism – LAMP system for technical and planning documents, Software for Urban, Phytosanitary and Spatial Protection Inspection; Directorate for Inspection Affairs – Inspection System For Directorate for Inspection Affairs; Clinical Center of Montenegro – Laboratory information system; Health Insurance Fund of Montenegro - DRG - grouping of services by diagnostic - therapeutic groups; Securities Commission – KOFIS - Software for Investment Funds Controlling; Phytosanitary Inspection - Inspection Software; Tourist Inspection – Inspection Software; Market Inspection – Inspection Software; Government of Montenegro – Electronic Petition Software; Municipality of Herceg Novi, Cetinje, Pljevlja – Software for communication with citizens – System 48.

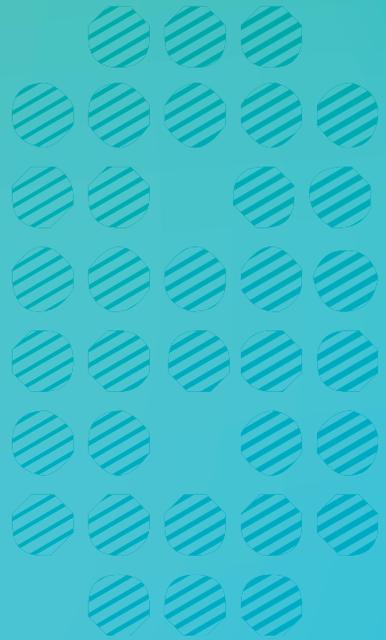
Furthermore, ČIKOM successfully implemented EU funded innovation projects: Interactive cultural digital map of Montenegro; Strengthening Industry 4.0 by Semantically Enhanced Cyber Security (SI4SEC); A virtual walk through the medieval Kanli Tower.

Our topics of interest spans across several topics within Horizon Europe pillar Global challenges and European industrial competitiveness; Implications of digitisation, new and emerging ICT technologies such as machine learning and artificial computing, distributed ledgers, Internet of Things, and High-Performance Computing; Digitisation in individual sectors, such as energy, transport, construction, service industry, health and care and government; Industrial metrology and quality assurance tools for smart manufacturing; etc.

We would welcome a discussion concerning any upcoming Horizon topic and possible cooperation.

# Writing a Winning Proposal - Tools for Proposal Writing

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# What is a proposal and what is a project?

A **Proposal** is a document similar to the Description of Work (DoW) that describes the aims and objectives of such a partnership. It covers the scientific/technical aspects, a concrete management/work plan and describes how the results will be used after the end of the project (exploitation) and what the long-term impacts are.

A **Project** consists of a group of a different organisation that jointly work to achieve a given goal, funded by the EC. This goal and the steps needed to achieve it is described in the DoW that is part of the contract with the EC.



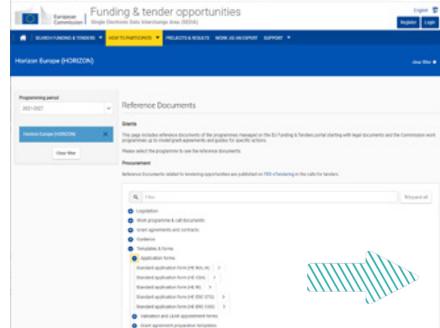
**Proposal Structure – Download proposal template!**

Standard application forms (Proposal Template models) are available at the FT Portal Reference document section, or if you click “Start Submission” for your selected call.



FT Portal Reference document Link:  
<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents;programCode=HORIZON>

## Example: Standard Proposal Template (RIA, IA) Contents



Picture: Funding & Tender Opportunities Portal reference documents section - Standard Proposal Template

- **Part A:** In this part you will be asked for certain administrative details that will be used in the evaluation and further processing of your proposal.
- **Part B:** Contains the details of the work you intend to carry out.
- **Section 1:** Excellence
- Objectives and ambition [e.g. 4 pages]
- Methodology [e.g. 15 pages]
- **Section 2:** Impact
- Project’s pathways towards impact [e.g. 4 pages]
- Measures to maximise impact - Dissemination, exploitation and communication [e.g. 5 pages]
- Summary
- **Section 3:** Quality and efficiency of the implementation
- Work plan and resources [e.g. 14 pages – including tables]
- Capacity of participants and consortium as a whole [e.g. 3 pages]

Example: Instructions for filling out proposal template are provided by the EC

### 1.1 Objectives and ambition [e.g. 4 pages]

- Briefly describe the objectives of your proposed work. Why are they pertinent to the work programme topic? Are they measurable and verifiable? Are they realistically achievable?
- Describe how your project goes beyond the state-of-the-art, and the extent the proposed work is ambitious. Indicate any exceptional ground-breaking R&I, novel concepts and approaches, new products, services or business and organisational models. Where relevant, illustrate the advance by referring to products and services already available on the market. Refer to any patent or publication search carried out.
- Describe where the proposed work is positioned in terms of R&I maturity (i.e. where it is situated in the spectrum from 'idea to application', or from 'lab to market'). Where applicable, provide an indication of the Technology Readiness Level, if possible, distinguishing the start and by the end of the project.

This Guide cannot address the question "How to get the maximum score in each section for all different calls/topics and types of actions". As much as we intend to provide tools and ready-for-use solutions, the overwhelming number of calls/topics makes the multiplicity of variables so great that practical instructions on all of them would never in practice be forthcoming. Regrettably, selective focusing on one type of action, reduces focus from a lot of other variables. Focusing on one set of variables runs the risk of devoting too much time to an irrelevant issue.

However, the section below elaborates on the principles that lead to *excellence in proposal writing for Horizon Europe*, as it addresses the *main challenges to overcome in proposal writing*.

Your philosophy for success includes knowing how to avoid or overcome four typical challenges: to read and implement the instructions; to make statements with enough supporting evidence to convince evaluators; to give sufficient detail of the activities that will be carried out; to be consistent in what you write in different parts of your proposal. The proposal writers who apply the following instructions will get the maximum score.

**Planning** is something that is done on a continuous basis. Whenever a project initiator gets an idea for a new proposal, it should be documented in some format. When a draft work programme is published, these ideas can be revisited, and partners can be contacted to discuss possible collaboration.

The preparation phase is the most important part. This is when the idea is discussed in detail. It is also the most interesting part as new ideas are discussed and new scenarios and approaches are examined.

Writing the actual proposal is just one step in the grant-seeking process and it is not the most time-consuming step. Far more time is normally spent analysing the context, stakeholders, relevant documents, data gathering, researching problems, strategies and possible solutions, finding adequate partners, developing the project and cultivating appropriate co-founders or officials, than on the actual preparation of the proposal. Roughly estimated, proposal writing represents approximately one-third of the overall workload.

Successful grant seekers capitalize on the intelligence they gather or partnership they build with stakeholders during the pre-proposal phases and cast their projects in ways that mesh with sponsors' values. For novice writers, a common mistake is a

psychological orientation towards their own ideas or needs, while successful writers focus on donors' interests.

The Draft Work Programmes are published up to six months before the Call for proposals. These drafts indicate the areas and topics that will be covered in the Call. At this stage, project leaders should start planning their proposals. This usually involves contacting a core team of potential partners and discussing possible proposal ideas. When the Call for proposals is published, this is the time to start preparing and writing the proposal and adding other partners. If you write the proposal yourself, try to give yourself deadlines for completing each section and create a clear [action plan with a timeline of the proposal writing process](#) to manage partners' expectations and integrate relevant partners' inputs.

## Intelligently interpreting instructions

Despite their length, you are strongly advised to *read and analyse all reference documents* before you start putting your proposal together. By far the biggest problem with proposals occurs because applicants do **not read and respond to the information and advice** provided by the EU programme background documents, proposal call information and Guide for Applicants! Thus, for example, the majority of questions by proposers could have been answered by [reading the Work Programme and/or Guide for Applicants!](#)

Every word in [Work Programme and Topic Description](#) has a meaning. You can hardly write the winning proposal if

you misinterpret a meaning of a single word. Having identified a suitable funding source to develop your idea your starting point is to carefully read the relevant background documentation for the funding scheme on programme objectives, objectives of the call and the Guide for Applicants. Your philosophy for success at this stage is to know *how to interpret those words* - to get inside the minds of the programme developers, to understand what *they want you to achieve with their money*. Go through all these documents and highlight the keywords, phrases and sentences to which you will need to respond to ensure that your proposal *does what they want you to do*.

✓ **Example: "close cooperation"** - you must give the evidence to demonstrate that the cooperation will indeed be close, by describing a number of major interactions between your institution and each partnering organisation, and not just token cooperation by a single short visit and exchange of a few emails, for example!

✓ **Example: "outstanding"**- only one word, but it will require several pages of text from you to give all the evidence that each of your partnering organisations is indeed outstanding, and not just another average-quality European organisation! By definition, the majority of organisations will be average, so your partner organisations have to give you all their measures of esteem to convince the evaluators that they really are outstanding: all their Nobel prize winners, notable patents, awards, other prizes, high numbers of visiting workers, track-records in training, publications in Nature and Science, as well as an above-average number of good-quality publications per year, etc.

## Work Breakdown Structure responding to the Type of Action and Topic Description

A work breakdown structure (WBS) is a visual, hierarchical and deliverable-oriented deconstruction of a project. Work Packages are constituted of Tasks. Giving each task a number makes it easy to identify them. A description defines what the task is and provides an activity description for the team when it is time for its implementation. The owner is a Partner who oversees the task from assignment to completion and ensures that it has been properly executed.

WBS and Objectives of winning proposals have been developed to ensure that the Expected impacts of the Topic description will be fully achieved and that they will be measurable and verifiable.

In designing WBS/tasks start by analysing the type of action and topic description. Examine previous projects. Break the topic description into a series of phases that will take you from conception to completion. What are your Outputs? List them all and note what is necessary for those outputs to be deemed successfully delivered (outcomes, deliverables, work packages, resources, participants, etc.) Take your deliverables from above and break them down into every single task and subtask that necessary to produce them. Make a list of all these tasks. Double-check the topic description and also with experienced partners, whether you have *intelligently interpreted words in the call text* and covered everything. With the tasks now laid out, assign them to existing partners *or rethink if you have included the best partners for the tasks*. The process of creation of the initial

WBS is crucial for creating an excellent consortium, equally as for the design of a high-quality proposal.

Proposal Templates available at the Funding & Tender Opportunities Portal can help you understand the expected structure, but the most effective way to learn is to examine previously funded projects under the same topic if available. Searching through CODRIS database helps and examining the websites of funded projects.



Link: European Commission: CODRIS  
Projects and Results  
<https://cordis.europa.eu/>

## Causality in proposal design

Causality (also referred to as causation, or cause and effect) is the relationship between project activities and expected outputs, outcomes and impacts. In a nutshell, analysing project causality implies that for each project activity, work package, and the entire project the following questions are asked: Why? What? and How?

Therefore, you need to start with the question 'Why are you proposing a project? (Stakeholders needs etc)'. Respecting the Causality principle if Why? is a cause then What? is the effect. What you are proposing should directly correlate with Why. Your proposed project objectives should be a direct repose to stakeholder needs etc. In top-down calls/topics, the EC explicitly stated for you what they want you to address. Similarly, the answer to How? is a link between your proposed

Activities (methodology, resources etc) and project Objectives (What?). During proposal evaluation it is easy to spot when proposal objectives do not correspond directly to stakeholders' needs, or if you have proposed too many, or too few activities to achieve Objectives, equally so with proposed resources.



Picture: Causality

## Consistency in the proposal text

It is very easy for you to fail to be consistent because you write the text little by little in the course of several weeks or months, yet evaluators read your whole proposal in just a few hours, and for them, any inconsistency will be easy to see: The total budget presented in Part A differs from that in Part B of the proposal.

Achieving consistency in what you say throughout your proposal is a major challenge, so constantly check what you have said elsewhere in the proposal, especially when approaching the submission deadline when you are trying to match the person-months and budget to the activities, and vice versa. Qualitative and quantitative changes to activities are frequently necessary during this process and inconsistencies in the texts can easily arise.

 *Example: If you state “improving proposal writing skills” as a project objective, make sure you describe activities somewhere in the rest of the proposal to achieve this!*

## Educating evaluator about evaluation criteria

In order to get the money, your proposal has to compete successfully against perhaps several hundreds of other proposals all wanting to make use of the same money that you want! Be aware that the competition for EU-funded projects is normally fierce. Therefore, your philosophy for success is to know how to make your project proposal the best that the evaluators will read: to get the maximum score for every one of the evaluation criteria. So, you need to know how to write your project proposal to make it impossible for the evaluators to take off any marks from your score; this typically means getting the highest score for each section of the proposal. Target your proposal to be the only one that is worth funding! To achieve this, your proposal will need to have something really special about it, so make sure you do not repeat the same things that everyone else will say!

Bear in mind that reviewers must go through a large number of proposals. Get straight to the point. Write a very brief introduction or a sentence stating evaluation criteria and provide measurable and credible evidence as to why you should receive a maximum score for each evaluation criterion. Prioritize and reduce the quantity of information in such a way that evaluators have no space for subjective assessment.

Your goal is to meet all the required criteria and to remain highly consistent in that regard! Make it easy for the evaluators to give you high marks. Don't make them work at it. Don't write too little, cover what is requested. Don't write too much. Don't leave the evaluators to figure out why your proposal is good, tell them why it is such. Leave nothing to the imagination - Never assume!

## Write clearly and concisely, use facts and figures

How do you write down exactly what you mean? Firstly, start each paragraph with the conclusion of that idea. Secondly, following this conclusion, focus on writing sentences that support the conclusion only. Apply the same steps to the rest of the proposal to ensure concise writing. It is very important to format text to make it easy for the evaluators to read. Use subheadings, indents, and break up text with tables or pictures occasionally. Make it easy for the reader to understand your messages.

Remember that every half-point in the evaluation counts! Think of the finishing touches which signal quality work: presentation, clear language, well-organized contents, no typos, no inconsistencies, no obvious paste-ins, no numbers which don't add up, no missing pages, etc.

## Providing a sufficient level of detail and evidence

How much detail do you need to write? It depends! Adjust the amount of detail you give to describe the work/activities/tasks to be done according to: the project scale, the project type, your level of experience in writing project proposals, your success rate for getting them funded, and the space available in the application form for giving the information.

If this is your first project proposal, i.e. you have no previous track record of

success, then you will need to provide more detail of each activity than if you are leading a project consortium that has already established a track record of success for large-scale collaborative international projects.

For each activity, you should **provide needs analysis, sufficiently detailed activity description to guarantee impact, and impact description.**

	<b>Example:</b>	<i>“One of our young R&amp;D scientists will spend one month in project year 1 at Institute X in Paris to be trained in how to use an ABC machine.”</i>
	<b>Needs analysis:</b>	<i>“Our institute currently has no ABC machine, though we plan to buy one in project Year 1, as it is essential to develop the diagnostic tests of Objective 4.”</i>
	<b>Activity Description:</b>	<i>“Thus, 1 of our talented scientists will analyse pasta DNA at the institute of Dr X in Paris for 1 month immediately before commissioning our ABC machine. Dr X has used ABC since 2001. She has 2 machines, one of which is regularly used to train visiting workers.”</i>
	<b>Impact analysis:</b>	<i>“Upon return to our institute, the young R&amp;D scientist will help commission the new ABC machine and provide training in its use to others to ensure dissemination and sustainability of the newly-acquired expertise.”</i>

## Test your applications against the evaluation grid

You should either use the services of experienced proposal writers and evaluators for your proposal review. This is the best option you can choose. Alternatively, download self-assessment/evaluation grid from the Funding & Tender Opportunities Portal and check if you have provided credible evidence for a maximum score on each evaluation criteria. Evaluation criteria are publicly available. Section “How to participate” of the Funding & Tender Opportunities portal contains

“Reference documents” with Templates and Forms including the Evaluation criteria. Ideally, also examine Frequently asked questions (FAQ) from evaluators, if available, for the call/topic you selected. In most cases, you can find them by internet search.

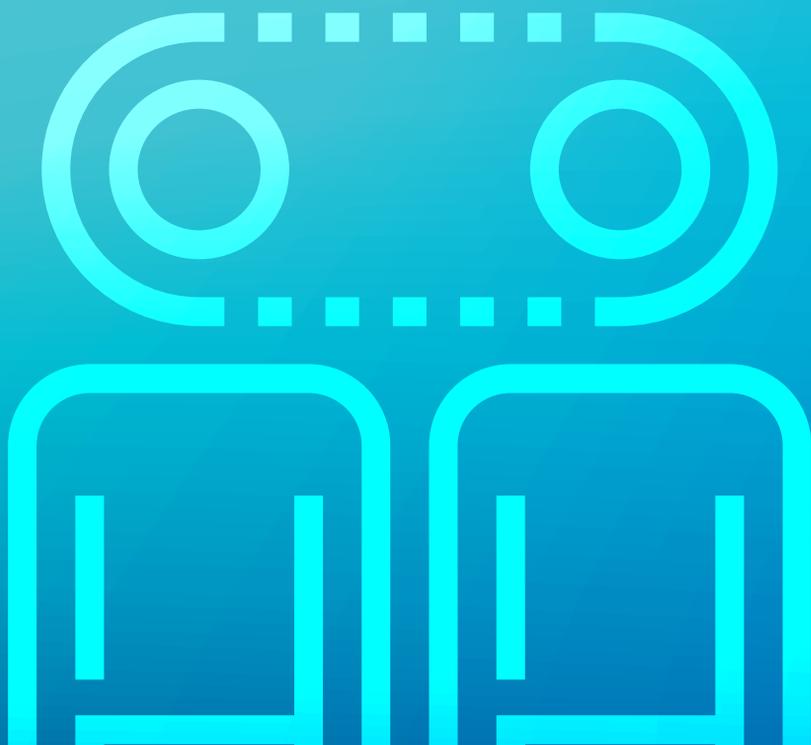
*Example of general evaluation principles for RIA and IA:*

<p><b>EXCELLENCE</b></p> <p> Clarity and pertinence of the project's objectives, and the extent to which the proposed work is ambitious, and goes beyond the state-of-the-art.</p> <p> Soundness of the proposed methodology, including the underlying concepts, models, assumptions, interdisciplinary of the gender dimension in research and innovations content, and the quality of open science practices research output and engagements of citizens, civil society and end users where appropriate.</p>	<p><b>IMPACT</b></p> <p> Credibility of the pathways to achieve the expected outcomes and impact specified in the work programme, and the likely scale and significance of the contributions due to the project.</p> <p> Suitability and quality of the measures to maximize expected outcome and impact, as set out in the dissemination and exploitation plan, including communication activities.</p>	<p><b>QUALITY AND EFFICIENCY OF THE IMPLEMENTATION</b></p> <p> Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall.</p> <p> Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise.</p>
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Picture: General evaluation principles for RIA and IA

# Grant Agreement Phase and Project Implementation

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If you have been awarded a Horizon Europe grant - Congratulations! Before you start working on the project you have to finish the final preparation steps of the so-called 'grant agreement phase'. You have grant agreement available at the Funding & Tender Opportunities Portal in the Reference document section.



Video lesson about the Grant Agreement is available at [https://www.youtube.com/watch?v=\\_1wywAOPdW0](https://www.youtube.com/watch?v=_1wywAOPdW0)



Funding & Tender Opportunities Portal Online Manual: [https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/om\\_en.pdf](https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/om_en.pdf)

Grant agreement defines your rights, for example: to receive EU funding, under the terms and conditions defined in the grant agreement, to help you to accomplish your project; to own the results of the project that you have generated; to ask for amendments of the grant agreement (if something needs to be changed). Next, obligations such as: to implement the project as planned in the description of the action; Submit reports at the time and for the periods defined in the grant agreement; Display the EU emblem and reference to Horizon Europe funding (e.g. information material, equipment funded by the grant, major results); and all other relevant details i.e. How much money you can get. Grant agreement phase must be finished within a timeframe set out by the European Commission (EC).

During the grant agreement phase, you must provide the necessary documentation and finish the grant agreement document. It consists of the formal agreements between the EC and the project consortium, the timeline and budget of the project and the description of the action. Complete exploitation, dissemination and communication plan has to be submitted during the first six months of the project. Any commitment during the proposal preparation

or negotiation phase, should be part of consortium agreement, that should be concluded before signing the grant agreement. This agreement should contain all rights and obligations of the parties, including: workplan, IP and quality management, specific liability, dissemination, communication within the consortium, etc.

Indicative timeline for evaluation and grant agreement is normally described in the relevant Work Programme section. More details are provided at the Topic Description page, in the support section. Particularly relevant is the Online Manual, as the entire communication during the implementation is conducted over the Funding & Tender Opportunities Portal.

**Project implementation** is defined by the grant agreement and your description of work in the proposal becomes legally binding. Experienced coordinators usually provide to novice partners guidelines for implementation and templates for reporting. However, the most important point regarding project implementation is good planning in the early phases of proposal writing which reduces failures and increases the quality of results.

The essence of project management is risk management. It reduces the number of surprises and leads to a better understanding of the most likely outcomes of negative events as well as stakeholder satisfaction.

Project managers need to take a proactive approach to **manage stakeholders' expectations** and perceptions. Active

stakeholder involvement keeps the project team focused on the objectives and reduces misunderstandings and dissatisfaction.

Control and Gantt charts<sup>5</sup> are useful vehicles for monitoring time performance.

The cost-schedule system allows the manager to have a positive influence on cost and schedule in a timely manner. The ability to influence cost decreases with time.

Contingency plans increase the chance that the project can be completed on time and within budget.

As for the financial control, the best practice is to consult Auditing authority at early stages “to get ready for mandatory or possible control”.

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*5 One of the most popular and useful ways of showing activities (tasks or events) displayed against time. On the left of the chart is a list of the activities and along the top is a suitable time scale. Each activity is represented by a bar; the position and length of the bar reflects the start date, duration and end date of the activity.*



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