

Proposal pre-screening guide

NCP GUIDE 2026

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Introduction

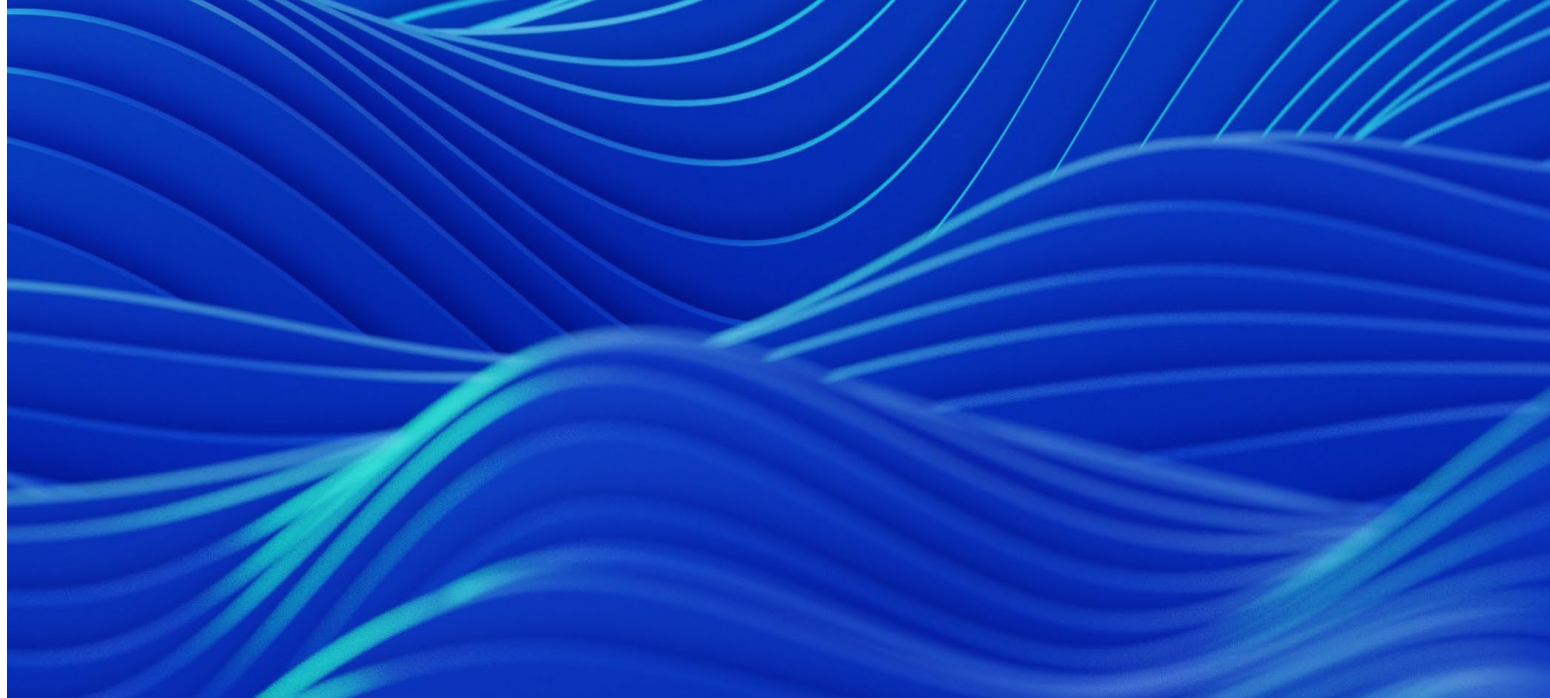
Pre-proposal screening guide (PPSG) aims at closing the innovation divide by helping NCPs in Widening Countries to rapidly acquire the know-how on NCP operations accumulated in other countries, through the knowledge and know-how presented in this guide.

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

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

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

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



Policy background

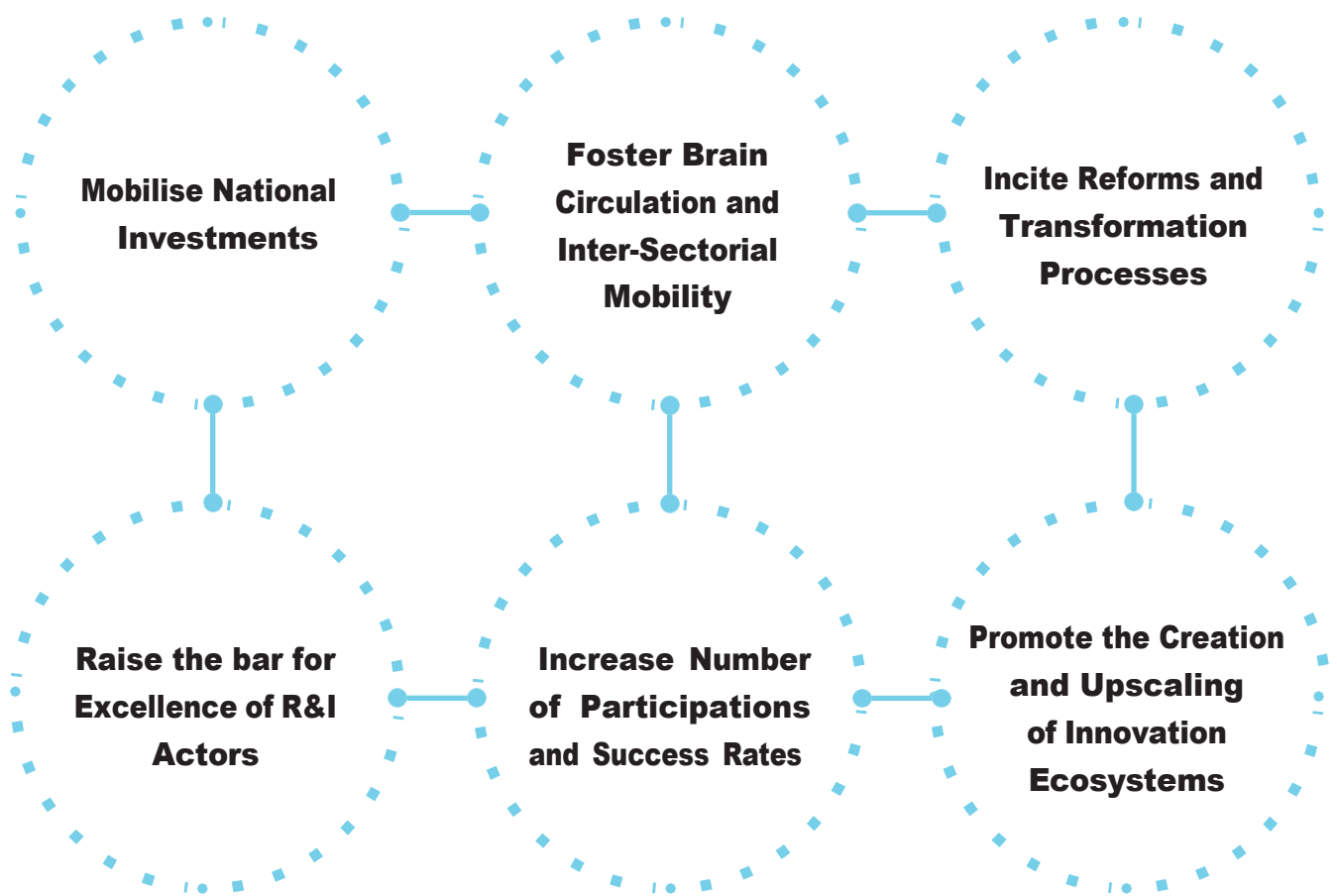
– Widening and ERA

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

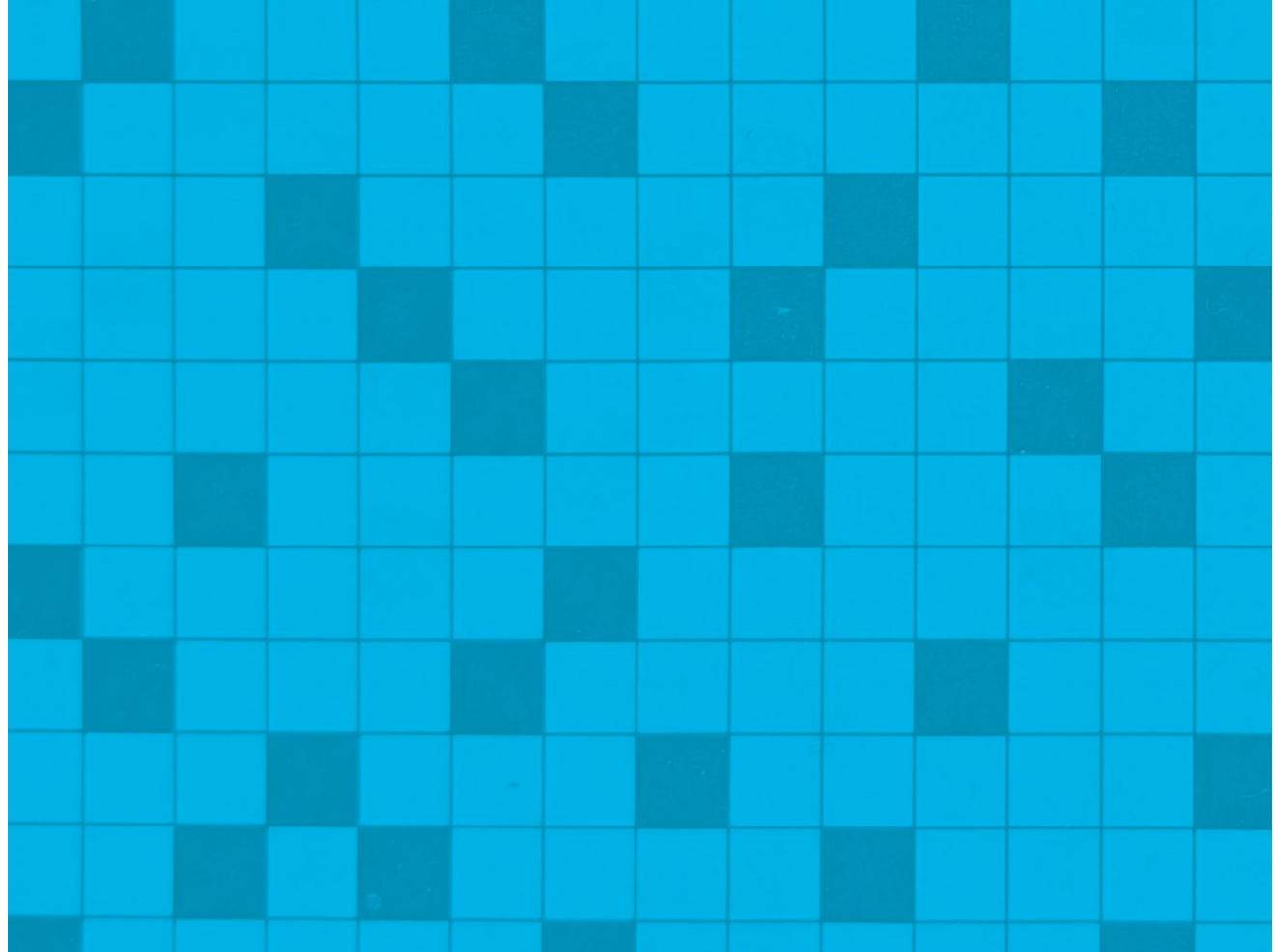
It is important to note, that building on almost 20 years of work, the European Council relaunched the new ERA in 2020 with updated priorities, governance and monitoring at national and EU level. In November 2021, the Council of the EU adopted conclusion on the governance of the ERA and the [Pact for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

research and innovation policy for the next decade. [Graph 1](#) contributes to the priority areas defined in the Pact. It establishes a governance framework for the ERA and 20 priorities among which are the promotion of attractive and sustainable research careers, bringing science closer to citizens and improving EU-wide access to excellence.

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



Graph 1



Decoding the work programme

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

[WIDERA work programme](#) (WP) not only lists the financial instruments and call topics, but also provides the reference to relevant policy documents, explains synergies between the instruments and states what objectives and impact projects should achieve. WP's Introduction section has two parts: Part I: Widening participation and spreading excellence and Part II: Strengthening the European Research Area (ERA) by reforming and enhancing the European research and innovation system.

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

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

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

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

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Introduction lists general expected impacts and general policies for the WIDERA. This information will not be available on the F&T portal with the call information, so it is a key to read the introduction and understand fully what will be required. For example, introduction mentions the Horizon Europe strategic plan 2025-2027 (2024) and Competitiveness Compass (2025), which are not mentioned in destination description and call topics. These policies are important and should be known by the NCPs.

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

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

Expected impact

- Increased science and innovation capacities for all actors in the R&I system in Widening countries;
- Structural changes leading to modernised and more competitive R&I systems with increased attractiveness and retention of research talents;
- Mobilisation of national and European resources for strategic investments;
- Higher participation in Horizon Europe and more leadership roles in collaborative projects;
- Stronger linkages between academia and business and improved career permeability;
- Greater involvement of regional actors in the R&I process;
- Excellent talents attracted to institutions including research infrastructures;
- Balanced circulation of R&I talents including intersectoral mobility, and improved gender equality and inclusiveness;
- Improved linkages and increased mobility between academic and business, notably by overcoming sectoral barriers;
- Free circulation of knowledge and expertise in line with ERA priorities.

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

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

HORIZON-WIDERA-2026-01-WIDENING-01: Teaming Synergies

Call: Teaming Synergies	
Specific conditions	
Expected EU contribution per project	The Commission estimates that an EU contribution of around EUR 7.00 million would allow these outcomes to be addressed appropriately. Nonetheless, this does not preclude submission and selection of a proposal requesting different amounts.
Indicative budget	The total indicative budget for the topic is EUR 7.00 million.
Type of Action	Coordination and Support Actions
Eligibility conditions	The conditions are described in General Annex B. The following exceptions apply: In order to achieve the expected outcomes, participation as coordinators to the call is limited to legal entities established in Widening countries, as defined in the Horizon Europe regulation, that have been or are coordinator of a Horizon 2020 or Horizon Europe Teaming action. Achieving the objectives of this topic requires in-depth knowledge of creating and sustaining a teaming centre of excellence that only a coordinator with this kind of experience can provide.

Expected Outcome: The Synergy action for Teaming Centres of Excellence (CoE) responds to the need to ensure the sustainability of CoE funded under the Teaming calls³⁰. The establishment of CoE in Widening countries, supported by a significant investment in Horizon 2020 and Horizon Europe, has created new opportunities for scientific, societal, and economic impact. However, to fully capitalise on this investment and enhance the sustainability and international competitiveness of these CoE, it is essential to facilitate stronger collaboration and strategic joint initiatives among them.

Proposals are expected to contribute to all the following outcomes:

- Stronger long-term collaboration among Teaming CoE through structured joint initiatives and clustering efforts to enhance mutual learning, resource sharing, and collective research and innovation capacity;
- Strategic transformation of R&I systems by enhancing institutional cooperation and supporting structural reforms at national and regional levels;
- Promotion of multidisciplinary and transnational cooperation that will enable CoE to address critical European and global challenges, and EU policy priorities;
- Promote ERA priorities such as responsible AI usage, knowledge valorisation, commercialization, and entrepreneurial activities, such as SMEs and start-ups, within the CoE to maximise economic and societal impact;
- Stronger visibility of CoE and their recognition at national, regional, and European levels through structured engagement with industry, policymakers, and society;
- Improved synergies between CoE and national and EU programmes to leverage additional funding opportunities and policy support.

Scope: The call topic aims at fostering collaboration among Teaming Centres of Excellence, both existing ones and those resulting from ongoing or future calls, in view of supporting their efforts towards sustainability and increased impact at the regional, national and European level.

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

The call topic expected outcomes (short term benefits) define what the project should contribute to by the end of the project (in this case, by the end of the 5 years as this is an example from the Teaming Synergies call).

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

- ERA Policy Agenda
- ERA Policy objectives
- Focus on research and innovation, etc.

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

General information on pre-screening

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

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

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

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

CSA	RIA
Activities that contribute to the objectives of Horizon Europe. This excludes research and innovation (R&I) activities, except those carried out under the 'Widening participation and spreading excellence' component of the programme (part of 'Widening participation and strengthening the European Research Area'). Also eligible are bottom-up coordination actions which promote cooperation between legal entities from Member States and Associated Countries to strengthen the European Research Area, and which receive no EU co-funding for research activities (HE WP 2026-2027, Annexes, p. 15).	Activities that aim primarily to establish new knowledge or to explore the feasibility of a new or improved technology, product, process, service or solution. This may include basic and applied research, technology development and integration, testing, demonstration and validation of a small-scale prototype in a laboratory or simulated environment (HE WP 2026-2027, Annexes, p. 15).

Accompanying measures or complementary activities, such as standardisation, dissemination, awareness-raising and communication, networking, coordination or support services, policy dialogue, mutual learning exercises, studies and networking and coordination between programmes in different countries (no research funding per se) (HORIZON EUROPE GLOSSARY: A SIMPLE GUIDANCE THROUGH HEU TERMINOLOGY, p. 31).	Most common action in HE.
Funding rate for CSA in HE: 100% (unless specified differently in a specific call text, for example in case of the EIC pre-accelerator call where the funding rate is 70 % of the eligible costs, despite being CSA).	Funding rate for RIA in HE: 100%
The limit is strictly set at 25 pages, increasing to 28 pages if the topic uses lump-sum funding	The limit for a full application: 44 pages For the lump sum: 45
In general, research costs are available for CSA type of actions in HE eligible under the „Widening participation and spreading excellence“ component of the programme, an example below: Twining: A research and innovation component not exceeding 30% of the total Horizon Europe grant (including the indirect costs) may be included, which should be presented in a dedicated work package (WP1) entitled 'Research component'. ERA Chairs: The grant covers salaries, recruitment, travel and consumables and equipment (up to 10% of the EU contribution), as well as administrative expenses. Excellence Hubs: The research component should be developed through joint research projects, closing knowledge gaps and advancing science and technology with market potential. The description of R&I component should include a long-term vision beyond the state of the art of the chosen R&I domain. The R&I component must be presented in a distinct work package in the proposal. The R&I component should not constitute the dominant part of the project.	Example of a RIA type of action in „Widening participation and spreading excellence“ component of the programme: HOP-ON FACILITY: Legal entities established in Widening countries may join already selected actions, subject to the agreement of the respective consortium and provided that legal entities from such countries are not yet participating in it. The proposal must be submitted by the coordinator of a consortium funded under Pillar 2 or an EIC Pathfinder call of Horizon Europe with a valid grant agreement that does not have any participant from a country eligible to host the coordinator under the Widening component (Widening country). The proposal must include the accession of one additional partner from a widening country. Despite being RIA – the proposal is only 8 pages, which is unique and only applies for Hop-on facility proposals.

Pre-screening: Systems and Budget

Decoding Part A

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

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

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

The following [video](#) explains in detail how to use PART A on F&T portal. The power point presentation of the video can be found on WIDERA project [website](#).

Horizon Europe lump sum funding model

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

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



WHY do we use lump sum funding?

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

WHAT are lump sum options?

There can be two lump sum types*:

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

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

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

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

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

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

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



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

WHAT is important when thinking about a consortium?

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

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

- Beneficiaries
- Affiliated entities
- Associated partners

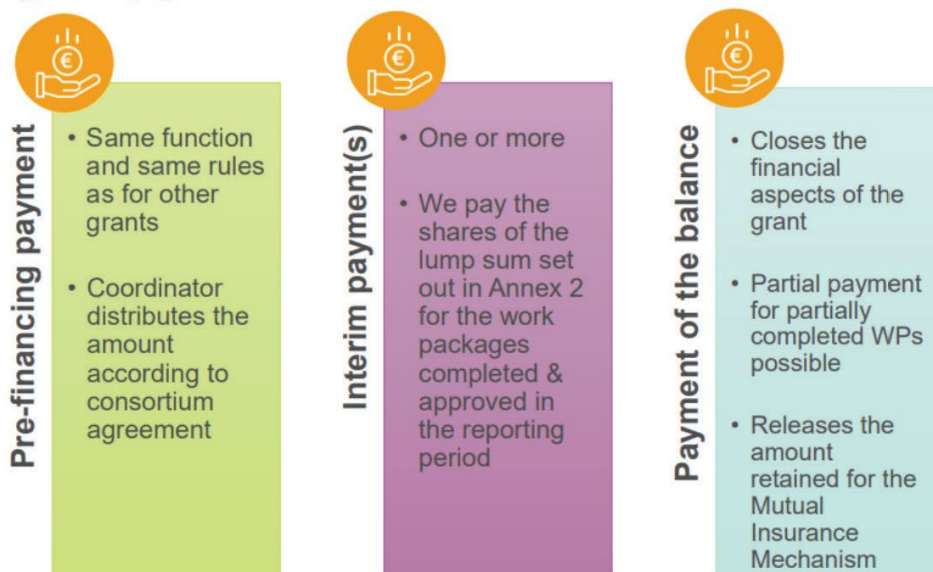
- Subcontractors (* Subcontracted activities must be in the grant agreement, but the Subcontractor may or may not be named.

HOW will lump sum application evaluation take place?

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

Payment schedule

Types of payments:



Art 22 lump sum MGA

HOW will the reporting and payments take place?

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

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

- If a work package is incomplete at the end of the project (e.g., for technical reasons or due to force majeure), the lump sum is paid partially in line with the degree of completion. The decision on the partial amount is taken on a case-by-case basis. You will be able to provide observations.
- Reporting is based on completion of WP (technical reports).

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

Keeping records

Art 20 lump sum MGA

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

Same as for all Horizon Europe grants



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

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

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

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

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

WHAT if the project needs changes?

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

Transfer between work packages are possible if:

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

Decoding Part B – CSA template

Fill in the title of your proposal below.

Title of the Proposal

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

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

List of participants

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

1. Excellence – What? Why? How?

NCP RECOMMENDATION

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

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

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

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

- The Pact for Research and Innovation
- Horizon Europe Strategic Plan 2025-2027
- Competitiveness Compass
- European Commission priorities and missions

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

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

Excellence

aspects to be taken into account.

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

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

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

1.1 Objectives

NCP recommendation:

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

1.2 Coordination and/or support measures and methodology

NCP recommendation:

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

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

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

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

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

NCP recommendation:

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

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

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

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

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

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

2. Impact

NCP recommendation:

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

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

The impact section is split in two main parts:

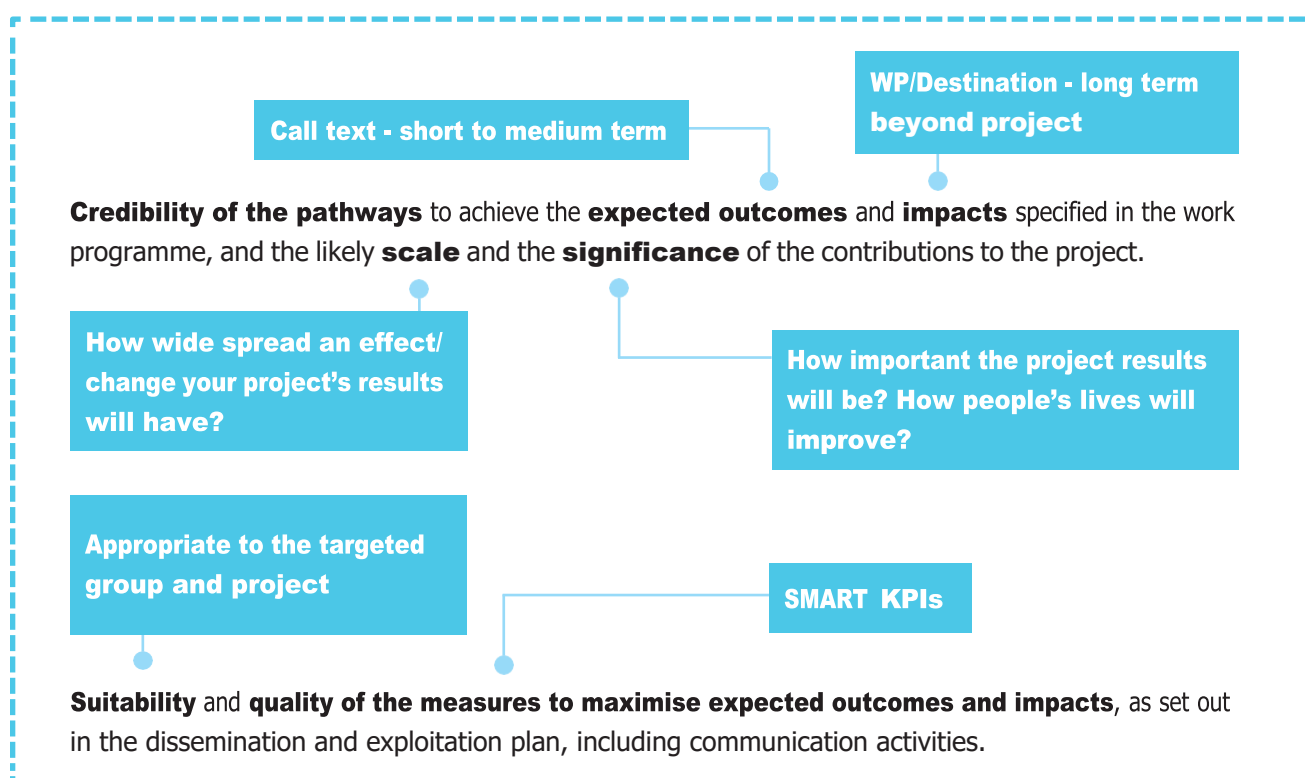
a) impact/outcomes and b) measures to maximize impacts/outcomes.

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

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

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

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



Author: Aurelija Povilaike, Research Council of Lithuania

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

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

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

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

2.1 Project's pathways towards impact

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

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

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

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

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

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

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

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

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

2.2 Measures to maximize impact – Dissemination, exploitation and communication

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

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

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

2.3 Summary

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

KEY ELEMENT OF THE IMPACT SECTION

EXPECTED RESULTS

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

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

D & E & C MEASURES

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

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

SPECIFIC NEEDS

What are the specific needs that triggered this project?

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

TARGET GROUPS

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

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

IMPACTS

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

Breakdown into types of impact and provide metrics where possible

(Information from: Impact section 2.2)

Things NCP should ask applicants when writing Impact section:

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

OUTCOMES

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

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

(Information from: Impact Section 2.1)

3. Quality and efficiency of the implementation

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

This section will be evaluated by considering the following criteria:

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

- Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall.
- Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise.

3.1 Work plan and resources

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

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

NCP recommendation:

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

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

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

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

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

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

Avoid allocating more than 30% of the overall

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

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

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

- Describe the consortium. How does it match the project's objectives, and bring together the necessary disciplinary and inter-disciplinary knowledge. Show how this includes expertise in social sciences and humanities, open science practices, and gender aspects of R&I, as appropriate. Include in the description affiliated entities and associated partners, if any.
- Show how the partners will have access to critical infrastructure needed to carry out the project activities.
- Describe how the members complement one another (and cover the value chain, where appropriate)
- In what way does each of them contribute to the project? Show that each has a valid role, and adequate resources in the project to fulfil that role.
- If applicable, describe the industrial/commercial involvement in the project to ensure exploitation of the results and explain why this is consistent with and will help to achieve the specific measures which are

proposed for exploitation of the results of the project (see section 2.2).

- Other countries and international organizations: If one or more of the participants requesting EU funding is based in a country or is an international organization that is not automatically eligible for such funding (entities from Member States of the EU, from Associated Countries and from one of the countries in the exhaustive list included in the Work Programme General Annexes B are automatically eligible for EU funding), explain why the participation of the entity in question is essential to successfully carry out the project

Tables for section 3.1

Table 3.1a: List of work packages

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

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

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

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

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

NCP recommendation:

- The work plan and work package structure must make perfect sense to the evaluators.
- Avoid redundancies, overlaps and gaps between the tasks within a given work package and across the various work packages – that is the key.
- After partners provide their input, it is important for the coordinator to unify the text and make it sound as one project.
- CSA is collaborative action, hence it is important to demonstrate the collaborative work present in each WP – avoid the

presentation of a single partner in a work package.

- The same applies when presenting partners in all WPs. The aim is to show the diversity of work in these projects. If all partners are included in all work packages, it may not make sense in the eyes of the evaluators. As an exception to that, it might be relevant to put all partners in "horizontal" work packages (e.g., the work package that deals with dissemination, communication and exploitation of results).

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

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

Table 3.1b: Work package description

For each work package:

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

Objectives

Link it back to objectives in Section 1.1

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

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

Deliverables (brief description and month of delivery)

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

Table 3.1c List of Deliverables

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

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

Deliverables

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

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

This need not be morphed into a long list of deliverables.

NCP ADVICE

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

Table 3.1d: List of milestones

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

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

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

Table 3.1f: Summary of staff effort

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

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

Personnel costs (main segment of most projects):

→ **Calculation of personnel costs**

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

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

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

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

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

Table 3.1g ‘Subcontracting costs’ items

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

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

Sub-contracting and 3rd parties:

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

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

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

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

Travel & subsistence costs:

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

Decoding Widening Instruments

This section will provide the insight into the main 2026-2027 WP Widening call topics. Some of the projects have been funded and the ESR analysis will explain how the successful projects performed against the evaluation criteria (excellence, impact and implementation).

Teaming Synergies

Teaming Synergies is a new action under the Horizon Europe WIDERA Work Programme 2026–2027, contributing to Destination 1 "Improved Access to Excellence". The instrument aims to strengthen research excellence and innovation capacity in Widening countries by supporting the development of Centres of Excellence through strategic partnerships and by creating synergies with European, national and regional funding programmes. As with all WIDERA instruments, the coordinator must be established in a Widening country.

This document provides a practical overview of the key aspects that should be considered when preparing and pre-screening proposals. For the calls that have been evaluated before it is structured around the three Horizon Europe evaluation criteria—Excellence, Impact, and Quality and Efficiency of the Implementation—it highlights the main elements expected by evaluators and supports applicants in identifying strengths and potential weaknesses before proposal submission. For the new calls – key information – such as eligibility, budget, and other aspects, is provided.

Who can participate and budget:

Participation is open to legal entities eligible under the Horizon Europe Rules for Participation. However, **the coordinator must be a legal entity established in a Widening country and must have coordinated a Horizon 2020 or Horizon Europe Teaming project.** This eligibility requirement reflects the need for proven experience in establishing and sustaining a

Teaming Centre of Excellence. The consortium should bring together complementary expertise, including organisations with experience in communication, training, knowledge valorisation, intellectual property, and stakeholder engagement, and should be capable of reaching past, ongoing and future Teaming Centres of Excellence across Widening countries. **Indicative budget:** EUR 7 million (one project is expected to be funded).

Evaluation procedure:

Proposals will be evaluated under the standard Horizon Europe single-stage evaluation procedure against the three award criteria: Excellence, Impact, and Quality and Efficiency of the Implementation. As a Coordination and Support Action (CSA), proposals should demonstrate a credible strategic approach, a strong consortium with the necessary expertise, and a realistic implementation plan with measurable key performance indicators (KPIs). For **Teaming Synergies**, the topic does **not** specify different thresholds, so the **standard Horizon Europe CSA thresholds** from the General Annexes apply: Excellence (Threshold: 3/5), Impact (Threshold: 3/5), Quality and Efficiency of the Implementation (Threshold: 3/5). An overall threshold of 10 out of 15 points. Only proposals meeting both the individual and overall thresholds are considered for funding.

Expected outcomes:

The action aims to ensure the long-term sustainability and competitiveness of Teaming Centres of Excellence (CoEs) by strengthening collaboration among existing and future Teaming projects. Expected outcomes include stronger cooperation and thematic clustering among CoEs, enhanced institutional and regional R&I systems, increased knowledge valorisation and entrepreneurship, greater visibility of CoEs, and improved synergies with

national and EU funding programmes.

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

- Call for proposals
- HE Main Work Programme 2026–2027 – 11.
Widening participation and strengthening the European Research Area
- HE Main Work Programme 2026–2027 – 15.
General Annexes
- Financial and operational capacity and exclusion:
described in Annex C of the Work Programme
General Annexes
- Award criteria, scoring and thresholds are
described in Annex D of the Work Programme
General Annexes

Twinning

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

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

Excellence – Evaluators frequently highlighted the importance of presenting clear, well-formulated SMART objectives that are realistic, measurable and fully aligned with the scope and expected outcomes of the Twinning call. Particular attention was given to demonstrating how the proposed activities will strengthen scientific excellence, research management capacities and the long-term

research profile of the coordinating institution. Evaluators also expected a coherent strategy for collaboration with the leading partners, including knowledge transfer, researcher mobility and capacity-building activities. Where relevant, proposals should clearly address Open Science practices, research data management in line with FAIR principles, and the integration of gender equality and inclusiveness throughout the project.

Impact – Comments mainly focused on the credibility of the proposed pathway towards the expected outcomes and the extent to which the project would strengthen research excellence, strategic collaboration and the international visibility of the coordinating institution. Evaluators expected a clear explanation of how networking activities, researcher mobility and the transfer of knowledge, expertise and research management practices from the leading institutions would generate sustainable

institutional impact. Proposals should also identify potential barriers to achieving the expected outcomes and provide appropriate mitigation measures. Dissemination, exploitation and communication activities should be well developed, clearly identifying target groups, appropriate communication channels, knowledge valorisation and, where relevant, intellectual property management

Implementation – Evaluators emphasised the need for a well-structured and balanced work plan, with clearly described work packages, tasks,

deliverables, milestones and appropriate planning tools, demonstrating logical links between activities. Particular attention was given to ensuring that the research component remains proportionate to the

Coordination and Support Action, with networking, capacity building and research management activities forming the core of the project. Strong proposals demonstrate complementary expertise across the consortium, clear allocation of

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

- Call for proposals
- Work Programme (introduction part and Destination 1 description)
- FAQs provided by (1) EC and (2) NCP_WIDERA. NET Project
- HE Proposal Standard Application Form
- Eligibility conditions as described in Annex B of the HE Work Programme General Annexes and admissibility conditions as described in Annex A and E of the same

responsibilities, a credible plan for long-term collaboration beyond the project duration, and realistic risk assessment supported by appropriate mitigation measures.

document.

- Award criteria, scoring and thresholds as described in Annex D of the HE Work Programme General Annexes
- Submission and evaluation processes as described in Annex F of the HE Work Programme General Annexes and the Online Manual
- Any Call for Proposals updates, as these are included in the 'Call Updates' Section on the Topic page in the Funding & Tenders Portal

Hop-On Facility

The Hop-On Facility call will open the opportunity for new participants from widening countries to join ongoing RIA projects under pillar 2 and the EIC pathfinder projects of Horizon Europe that have not yet any partner from a widening country.

With this document, we aim to provide an overview of the important aspects that the evaluators indicated through the evaluation procedure performed for the Hop-On Facility call in Horizon

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

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

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

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

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

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

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

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

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

Why were they created?

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

When this scheme was developed, one of the policy objectives of the call was to open up established closed networks of research

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

Who can participate:

1. A consortium already funded under Pillar 2 or the EIC Pathfinder RIA with a valid grant agreement but no partner from a Widening country. The first reporting period of the Horizon Europe grant agreement is ongoing at the submission deadline. Furthermore, the ongoing grant agreement is between 1 to 12 months from its starting date by the submission deadline.
2. A legal entity from a Widening Country interested in becoming a new partner in a RIA project. The HE regulation indicates Bulgaria, Croatia, Cyprus, Czechia, Estonia, Greece, Hungary, Latvia, Lithuania, Malta, Poland,

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

Budget

The total budget for the Hop-On Facility is 30 million euros and the foreseen budget for each project is between 200 thousand and 600 thousand euros that will be added to the initial budget of the consortium.

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

Coordinator (COO) might receive a coordination fee amounting up to the 10% of the increased budget. All costs categories eligible under the ongoing RIA will become eligible for Hop-On activities financing. The expected number of projects that will be funded under the Hop-On is 60.

Admission procedure of a new widening partner to the consortium

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

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

Step-by-step procedure

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

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

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

How can widening partners enter a consortium?

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

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

HOP-ON Facility insight

- 61 project proposals submitted
 - Number of below-threshold proposals: 0
 - Number of ineligible proposals: 10
 - Number of retained projects: 50
-

How can NCPs contribute to the call?

- Encourage coordinators of eligible projects to engage in the Hop-On Facility and welcome new partners. Eligible existing consortia for the Hop On facilities will appear automatically in the digital list on the Commission websites and coordinators will be notified as their consortium is inserted in the list.
- Raise awareness amongst your national community through the organization of matchmaking events.
- Liaise with NCPs working on Pillar II and EIC to raise awareness for the Hop-On Facility and encourage engagement of widening partners and consortia.
- Out of all widening countries, Portugal had the highest success rate at the call with 11 projects retained, followed by Greece (10), Hungary (5), Czech Republic (4), Poland (4). Other widening countries retained less or no proposals.

Research Management Facility

Research Management Facility is a new action under the Horizon Europe WIDERA Work Programme 2026–2027. The instrument aims to strengthen research management capacity across Widening countries by establishing a Research Management Facility that provides structured support, expertise, networking opportunities, and capacity-building services to research-performing and research-funding organisations. The Facility is expected to contribute to the professionalisation of research management, improve participation in Horizon Europe, and reinforce institutional capacity to manage excellent research and innovation activities. As with all WIDERA instruments under Destination 1, the coordinator must be established in a Widening country.

Who can participate and budget:

Participation is open to legal entities eligible under the Horizon Europe Rules for Participation. The coordinator must be a legal entity established in a Widening country. Given the scope of the action, the consortium is expected to include organisations with proven expertise in research management, research support services, institutional

capacity building, policy development, training, networking, digital service provision, communication, and stakeholder engagement. Participation of organisations representing research managers, universities, research-performing organisations, research funding organisations, and relevant European networks is expected to ensure broad outreach and sustainability of the Facility.

Evaluation procedure:

Proposals will be evaluated under the standard Horizon Europe single-stage evaluation procedure against the three award criteria:

- Excellence
- Impact
- Quality and Efficiency of the Implementation

As a Coordination and Support Action (CSA), proposals should present a convincing concept for establishing and operating the Research Management Facility, demonstrate an excellent understanding of the needs of research management communities in Widening countries, and provide a robust implementation methodology supported by measurable Key Performance Indicators (KPIs). The consortium should demonstrate complementary expertise and sufficient operational capacity to deliver services at European scale.

Expected outcomes:

The Research Management Facility is expected to become a central European support structure for research management in Widening countries. Expected outcomes include:

- strengthened professionalisation of research management across Widening countries;
- improved institutional capacity to prepare, implement and manage competitive R&I projects;
- enhanced networking and exchange of good practices among research managers and institutions;
- increased participation and success rates of Widening organisations in Horizon Europe and other European R&I programmes;
- improved strategic research management skills, including research assessment, open science, knowledge valorisation, research ethics, intellectual property management, and talent management;

- greater coordination between national and European initiatives supporting research management;
- sustainable community building and long-term support services for research managers.

EIC pre-accelerator

The EIC Pre-Accelerator is a joint initiative of the European Innovation Council (EIC) and the Widening Participation and Strengthening the European Research Area (WIDERA) programme. It aims to strengthen the innovation potential of early-stage deep-tech companies established in Horizon Europe widening countries by improving their technology, business and investor readiness.

The action supports high-potential deep-tech innovators in developing their innovations towards market deployment while increasing their attractiveness to private investors and preparing them for follow-on funding, including the EIC Accelerator. In addition to financial support, successful applicants receive tailored Business Acceleration Services, including coaching, mentoring and networking opportunities. Following a positive project review, beneficiaries may also gain access to the EIC Accelerator Fast Track.

Who can participate and budget:

Applications are submitted by a single legal entity (mono-beneficiary). Eligible applicants are SMEs or small mid-caps established in a Horizon Europe Widening country that: i) develop a high-impact deep-tech innovation with the potential to create new markets or disrupt existing ones; ii) have reached at least **TRL 4** (technology validated in the laboratory); iii) possess the necessary Intellectual Property Rights to ensure freedom to operate; iv) have a clear pathway to market supported by measurable milestones and KPIs

The funding rate is 70 % of the eligible costs. Eligible costs will take the form of a lump sum funding model. The total indicative budget for the topic is EUR 40.00 million, while the contribution per project is expected to be between 0,50-1 million EUR.

The main observations resulted from analysing ESRs randomly are listed below.

Excellence – Successful proposals clearly demonstrated the technological novelty of the innovation and explained how it outperforms existing solutions using quantitative evidence rather than general claims. They presented a convincing analysis of the state of the art, identified competitors, and clearly positioned their technology within the market. Strong proposals also showed a credible TRL progression, with well-defined technical objectives, measurable KPIs and a coherent methodology linking work packages to the expected technological advancement. The unique selling proposition was consistently integrated into the technology development strategy and supported by previous results, patents, scientific publications or prototype validation.

A recurring weakness was the insufficient demonstration of technological breakthrough. Many proposals relied on combinations of existing technologies without clearly explaining why the overall solution represented a significant advance over the state of the art. Benchmarking against competing technologies was often qualitative rather than quantitative, making it difficult to assess novelty and performance. Evaluators also frequently questioned claimed TRL starting points due to insufficient evidence and noted that methodologies often lacked enough technical detail to demonstrate that the proposed TRL progression was achievable within the project duration. Business objectives and KPIs were frequently less developed than technical ones, with limited justification of their relevance or feasibility.

Impact – High-scoring proposals presented a convincing pathway from technology development to commercialisation. They demonstrated a strong understanding of customer needs, provided credible market validation activities, and clearly described how the project would improve investment readiness. Successful applications included realistic business models, coherent go-to-market strategies, well-developed intellectual property protection plans and clearly identified regulatory pathways where relevant. Evaluators also valued proposals that convincingly quantified market opportunities and clearly explained the expected economic, societal and strategic benefits for Europe.

Many proposals overestimated market potential without providing sufficient supporting evidence. Market analyses often lacked quantitative segmentation, competitor benchmarking or validated customer demand. Commercial assumptions, such as willingness to pay, pricing strategies or revenue projections, were frequently insufficiently substantiated. Evaluators also identified weak dissemination and exploitation strategies, generic communication plans, poorly developed IP strategies and limited evidence of stakeholder engagement. In several cases, expected societal and economic impacts, including job creation, contribution to strategic autonomy or policy relevance, remained too general and insufficiently quantified.

Implementation – Strong proposals demonstrated that the project team possessed the technical, business and commercial expertise necessary to bring the innovation to market. Work plans were logically structured, with clearly defined work packages, milestones, deliverables and measurable KPIs directly linked to project objectives. Risks were systematically identified together with realistic mitigation measures. Successful proposals also showed a balanced allocation of resources, appropriate planning for validation activities and a coherent implementation pathway from technology maturation to market readiness.

Implementation sections often lacked sufficient detail on how objectives would be achieved in practice. Evaluators frequently noted inconsistencies between the proposed work plan, milestones and expected outcomes. Risk analysis was sometimes incomplete or focused only on technical risks while overlooking commercial, regulatory or market-related risks. Resource allocation was not always convincingly justified, and some proposals lacked sufficiently detailed validation protocols or acceptance criteria. In several cases, the commercial expertise of the team or the implementation of business development activities was less convincing than the technical aspects of the project.

EIC pre-accelerator - Widening (HORIZON-WIDERA-2025-02) INSIGHT

1083 project proposals submitted

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

20 are in the reserve list

37 proposals inadmissible

35 proposals ineligible

300 proposals above threshold, but below available budget

620 proposals below-threshold

Funding threshold – 13,8

ERA Chairs and Research Managers

ERA Chairs and ERA Research Managers form a common capacity-building initiative under the Horizon Europe WIDERA programme, aimed at strengthening the research and innovation performance of institutions established in Widening countries. Both instruments support research-performing organisations in attracting an outstanding international professional who can establish or reinforce a high-performing team and lead sustainable institutional reforms. While ERA Chairs focuses on scientific leadership and the development of an excellent research group in a selected research field, ERA Research Managers focuses on professional research-management leadership and the improvement of institutional support systems, services and procedures.

Both actions are designed to create long-term structural change rather than fund isolated research or administrative activities. Projects are expected to improve the host institution's ability to attract and retain talent, participate successfully in competitive European and international funding programmes, build strategic partnerships and implement good practices related to recruitment, career development, open science, gender equality and knowledge valorisation. Applicants must demonstrate a clear institutional need, strong commitment from senior management, transparent international recruitment, measurable objectives and a credible plan for integrating and sustaining the new team and institutional capacities after the end of EU funding.

ERA Chairs

Who can participate and budget:

The ERA Chair holder is expected to combine scientific excellence with leadership and institutional-change capabilities. Through the establishment of a permanent research group, improved recruitment and career practices, better research governance and stronger links with external partners, the action should create a sustainable "pocket of excellence" within the host institution. Projects may address any scientific domain.

Applications are submitted by a single legal entity — mono-beneficiary. The applicant must be a legal entity established in a Horizon Europe Widening country and should be a research organisation or research infrastructure seeking to establish an ERA Chair. Two commitment letters are mandatory: i) a letter from the prospective ERA Chair holder confirming their commitment, time allocation, on-site presence, tasks and agreed contractual conditions, including salary; ii) a letter from the head of the applicant institution confirming institutional support, access to facilities and resources, appropriate authority and freedom to apply for national and international funding.

The observations below synthesise evaluator comments reported for previous ERA Chairs evaluations.

Excellence High-scoring proposals clearly demonstrated that the action was an institutional capacity-building project rather than primarily a scientific research project. They presented an evidence-based assessment of the host institution's starting position, often supported by a credible SWOT or gap analysis, and established a direct connection between identified institutional weaknesses, project objectives, support measures and the anticipated reforms. Successful proposals convincingly demonstrated the scientific standing and leadership profile of the prospective ERA Chair holder. Evaluators valued evidence of high-quality research outputs, international recognition, competitive funding acquisition, supervision and training experience, technology or knowledge transfer, collaboration with industry and experience in organisational leadership. Objectives were specific, measurable and realistic, covering not only research outputs but also recruitment, institutional change, research management, internationalisation, knowledge valorisation and talent development. A recurring weakness was that proposals were written mainly as research projects. The scientific programme was described in detail, while the coordination and support measures, institutional reforms and organisational transformation were

underdeveloped. Other weaknesses included an insufficiently credible commitment from senior management, vague arrangements concerning the Chair's authority and resources, and limited attention to gender equality, open science and transparent recruitment. The Chair holder's CV and the narrative should jointly demonstrate three dimensions: scientific excellence, international leadership and capacity to deliver institutional change. The proposal should clearly explain what authority the Chair holder will have over recruitment, budgets, supervision, strategic decisions and funding applications.

Impact – Strong proposals presented a credible pathway from project activities to both organisational-level and system-level outcomes. They explained how the project would improve research excellence, attract international researchers, create a permanent research group, strengthen success in competitive funding and contribute to wider institutional and national R&I reforms. Evaluators valued proposals that quantified expected changes using baselines, targets and periodic indicators. Relevant indicators included international recruitment, permanent positions created, competitive proposals submitted and funded, publications, citation impact, new partnerships, mobility, doctoral and postdoctoral training, industry cooperation, intellectual-property outputs, knowledge-valorisation activities and institutional-policy changes. Communication, dissemination and exploitation measures were tailored to specific audiences. Common weaknesses included expected impacts that were listed but not quantified, weak or missing baselines, generic KPIs and an unclear distinction between outputs, outcomes and longer-term impacts. Sustainability plans were frequently too dependent on future funding applications. Evaluators questioned proposals that did not provide firm institutional commitments concerning permanent posts, operational financing, facilities or the continuation of reforms.

Implementation – High-scoring proposals presented an integrated work plan covering recruitment, research-group establishment, institutional reforms, scientific activities, training, networking, communication, exploitation, sustainability and project management. Work packages were logically connected and contained measurable deliverables, milestones and decision points. Evaluators valued clear recruitment procedures, including the role of the international recruitment panel, realistic recruitment timelines, defined researcher profiles and transparent salary assumptions. Strong proposals clearly described the respective responsibilities of the Chair holder, institutional leadership, administrative units and the permanent research-group leader. Implementation was particularly convincing where resources corresponded directly to the proposed activities and where the host institution provided complementary resources, facilities or equipment. Risk management covered not only project administration and scientific risks but also recruitment, relocation, retention, institutional resistance, regulatory constraints and long-term financing.

ERA Chairs (HORIZON-WIDERA-2023-TALENTS-01) INSIGHT

158 project proposals submitted

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

5 are in the reserve list

8 proposals inadmissible

3 proposals ineligible

79 proposals above threshold, but below available budget

Funding threshold – 12

ERA Research Managers

ERA Research Managers is a new WIDERA instrument introduced in the Horizon Europe Work Programme 2026–2027. It transfers the general ERA Chairs approach from scientific leadership to institutional research-management leadership. The action aims to attract experienced research managers to research-performing organisations in Widening countries and to establish or upgrade permanent, professional research-management capacities. The appointed ERA Research Manager should lead a dedicated team and support institutional reforms in areas such as funding acquisition, research strategy, project administration, resource allocation, compliance, knowledge transfer, intellectual-property management, open science, ethics and gender equality.

Who can participate and budget:

Applications are submitted by a single legal entity — mono-beneficiary. The applicant must be a research organisation established in a Horizon Europe Widening country. Because the ERA Research Manager and the resulting team are expected to operate at institutional level, only one proposal per legal entity may be submitted. The proposal must include:

1. a letter from the prospective ERA Research Manager confirming their commitment, time allocation, on-site presence, tasks and contractual arrangements, including salary;
2. a letter from the head of the applicant institution confirming institutional support and the authority and resources required to perform the role.

The action is a CSA. The indicative topic budget is EUR 65 million, with approximately 30 projects expected to be funded. The expected EU contribution is between EUR 1.50 million and EUR 2.50 million per project, and the expected duration is five years. Eligible costs will be funded through a lump-sum grant.

Evaluation procedure & other conditions

Proposals will be evaluated under the standard Horizon Europe single-stage procedure against Excellence, Impact and Quality and Efficiency of the Implementation. As no topic-specific thresholds are stated, the standard CSA thresholds apply: **3/5 for each criterion and 10/15 overall**. Proposals meeting all thresholds but not funded because of budget limitations may receive a Seal of Excellence. Geographical diversity among Widening-country coordinators will be considered first when ranking ex-aequo proposals.

The proposed ERA Research Manager should have a demonstrable international track record in developing or leading research-management functions. The ERA Research Manager must establish or reinforce a research-management team fully integrated into the applicant institution. Recruitment must be open, transparent and merit-based and led by an international panel chaired by the ERA Research Manager.

The proposal should specify the intended team structure, professional profiles, competence levels, salaries and recruitment timetable. The names of future recruits are not expected at proposal stage. No more than 50% of the team may have previous contractual links with the institution.

The proposal must include a self-assessment of the institution's existing research-management and administration capacities. This should identify current strengths, gaps, bottlenecks and institutional needs. The self-assessment should be supported by evidence, for example staffing levels, proposal-submission and success rates, time required for internal procedures, audit findings, service-user feedback, benchmarking against peer institutions and gaps in professional competences. A generic statement that research management should be "improved" will not be sufficient. The proposal should explain which functions are absent or underperforming, why existing structures cannot address the problems and what institutional change will result from the ERA Research Manager's intervention.

Expected outcomes

At organisational level, projects should strengthen research-management capacities, establish a lasting and high-performing research-management group, improve international visibility and increase the institution's success in securing competitive funding. The action should also make the institution more attractive to international research managers and, indirectly, to researchers.

At system level, projects should contribute to increased mobility of research-management talent towards Widening countries, institutional reforms, stronger professional human capital, better communication of R&I results and greater research capacity, competitiveness and economic growth.

Projects should also promote good practice in ERA priorities, including ethics, open science and data, gender equality and effective knowledge valorisation. Expected impacts should be quantified through indicators covering institutional changes, research outputs, IPR protection, knowledge valorisation, competitive-funding performance and improvements in research-management services.

Excellence Hubs

Excellence Hubs fosters collaboration between academia, business, government, and society in Widening countries; strengthens regional research and innovation excellence by enabling place-based innovation ecosystems in Widening countries to work together across borders. Excellence Hubs focus on innovation by allowing innovation ecosystems in widening countries and beyond, to team up and create better linkages between their constituents that mutually reinforce each other in the transformation of scientific knowledge, namely academia, business, government and society. Excellence Hubs should improve access to excellence for R&I actors in Widening countries and elaborate joint R&I strategies that are aligned with national, regional and/or European strategies or policy

priorities.

With this document, we aim to provide an overview of the important aspects that the evaluators indicated through the evaluation procedure performed for the first Excellence Hubs call for proposals in Horizon Europe (topic identifier: HORIZON-WIDERA-2023-ACCESS-07-01).

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

Excellence – The evaluators considered the objectives of all the projects selected to be funded as very clearly stated, measurable, verifiable, ambitious and realistically achievable. The objectives are also pertinent to the work programme and address very well the need for place-based innovation ecosystems. In all the 11 projects research data management and the management of other research outputs are in line with FAIR principles. Open science practices in these projects are well considered, taking into account open sharing of results and ensuring their quality and transparency. Where the gender dimension was relevant to the proposed activities or research content, it was appropriately addressed.

Measures for staff exchanges, twinning of activities between ecosystems, skills development for research and innovation management and citizen engagement represent an added value for the majority of the 1 projects.

For the 2027 call, applicants should go beyond general descriptions and clearly explain how the proposed joint R&I activities will close knowledge gaps, advance science and technology, demonstrate market potential and support the development of the joint strategy and investment plans. The research component should have a credible long-term vision beyond the state of the art and should be presented in a distinct work package without becoming the dominant part of the project.

Impact – Overall, the proposed pathways to achieve the expected outcomes and impacts specified in the work programme are highly credible and convincing. In some cases the pathways comprise an innovative mix of traditional and novel approaches. Potential barriers, that may determine whether the desired outcomes and impacts are achieved, are appropriately identified and appropriate mitigation measures are proposed. However, sometimes, although some technological barriers are mentioned, other potential barriers beyond the control and scope of the project – including other R&I achievements by competitors, regulatory environment and mitigation measures towards achieving the goals despite these barriers – are insufficiently addressed. The dissemination and communication plans are appropriate to the scale of the projects. It is clearly stated that dissemination and communication strategies are comprehensive and include all stakeholders. Clearly described KPIs are associated with each of the dissemination and communication measures.

For the 2027 call, the impact section should place particular emphasis on:

- long-term sustainability of the participating ecosystems;
- measurable institutional and behavioural change;
- mobilisation of regional, national, European and private investment;
- commercially sustainable business models;
- new opportunities for SMEs, start-ups and university spin-offs;
- translation of R&I results into economic and societal applications;
- contribution to European strategic value chains and competitiveness;
- complementarity with relevant European and regional initiatives; and
- credible arrangements for financing pilots, demonstrators or other follow-up investments outside the Excellence Hubs grant.

Implementation – Successful proposals presented coherent and realistic work plans, with logically structured work packages, clear links between activities, and appropriately timed milestones and deliverables. Evaluators valued consortia that combined complementary expertise across research, business, public authorities and civil society, with clearly defined roles and adequate resources to carry out the proposed tasks.

Common weaknesses included overly numerous or insufficiently detailed deliverables, milestones that were too general to support effective decision-making, and mitigation measures that did not fully address identified risks. For the 2027 call, proposals should also clearly explain cross-border cooperation, consortium governance, partner responsibilities, budget proportionality, the required co-financing arrangements, and how collaboration will continue beyond the funded period.

EXCELLENCE HUBS (HORIZON-WIDERA-2023-ACCESS-07-01) INSIGHT

205 project proposals submitted

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

5 are in the reserve list

2 proposals inadmissible

5 proposals ineligible

120 proposals above threshold

Funding threshold - 14

Annexes

Annex I Pre-screening checklist (short version)

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

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

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

Applicability

(Self-) assessment tool

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

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

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

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

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

Annex II Pre-screening checklist (extensive version)

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

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

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

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

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

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

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

Annex III Eligibility requirements

Funding instrument / call	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
Teaming Synergies	Consortium coordinated by an organisation in a Widening country with previous or ongoing Teaming coordination experience.	Existing, ongoing and future Teaming Centres of Excellence across Widening countries; European-level networking and clustering.	Ensure the sustainability and international competitiveness of Teaming Centres of Excellence; promote joint initiatives, resource sharing, institutional cooperation, knowledge valorisation, entrepreneurship and synergies with national and EU funding.	General Annex B applies. The coordinator must be established in a Widening country and must have coordinated, or currently coordinate, a Horizon 2020 or Horizon Europe Teaming action. Other entities may participate under the standard Horizon Europe rules.
Twinning	Consortium led by one research institution or research infrastructure from a Widening country, linked with at least two internationally leading institutions from two different Member States or Associated Countries.	Research institutions, higher education institutions and research infrastructures; institutional cooperation in a selected R&I field.	Raise the research profile, scientific excellence, international visibility and research-management capacity of the coordinating institution through networking, staff exchanges, training and joint strategic activities.	General Annex B applies. The coordinator must be established in a Widening country. The consortium must include at least two internationally leading research or higher education institutions from two different Member States or Associated Countries.
Hop-on Facility	The coordinator of an eligible ongoing Horizon Europe project plus one new beneficiary from a Widening country.	Research and innovation organisations from Widening countries joining ongoing Pillar II or EIC Pathfinder collaborative projects.	Integrate Widening organisations into established European R&I networks; add new expertise and research value; improve participation, competences, visibility and future collaboration opportunities.	The proposals must include only one legal entity established in a widening country and one legal entity which is the coordinator of an eligible already funded action under Horizon Europe grant agreement from Pillar II or EIC Pathfinder collaborative R&I actions. The first reporting period of the Horizon Europe grant agreement is ongoing at the submission deadline. Furthermore, the ongoing grant agreement is between 1 to 12 months from its starting date by the submission deadline.

Funding instrument / call	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
Research Management Facility	European consortium coordinated by an organisation in a Widening country; at least three independent beneficiaries.	Research-performing institutions and research managers across all Widening countries; one European-scale support facility.	Provide tailored institutional needs assessments, implementation plans, training, peer learning and networking to establish or upgrade professional research-management capacities.	General Annex B applies. The coordinator must be established in a Widening country. The consortium must include at least three independent legal entities in three different Member States or Associated Countries, with at least two established in Member States. Coverage of all Widening countries is expected.
ERA Fellowships 2026 and 2027	Joint application by an individual researcher and one host organisation in a Widening country, following the MSCA European Postdoctoral Fellowship model.	Excellent postdoctoral researchers of any nationality undertaking international mobility to a Widening country; individual fellowship scale.	Attract excellent researchers to Widening countries; develop research and transferable skills; improve careers, international mobility, research outputs and the attractiveness of host institutions.	Applicants first apply to the corresponding MSCA Postdoctoral Fellowships call. Eligible but unfunded proposals are transferred to the ERA Fellowships ranking unless the applicant opts out. The host must be in a Widening country and all MSCA eligibility and mobility rules apply.
EIC Pre-Accelerator – Widening	One SME as a mono-beneficiary.	Early-stage deep-tech start-ups and SMEs established in Widening countries; company-level technology and business development.	Strengthen technology, market and investment readiness; validate and mature deep-tech innovations; prepare companies for the EIC Accelerator, private investment or other scale-up funding.	General Annex B applies. Only one legal entity may apply. The beneficiary must be an SME established in a Horizon Europe Widening country, develop a deep-tech innovation and demonstrate an appropriate starting TRL, intellectual-property position and freedom to operate.
ERA Chairs	One research organisation or research infrastructure in a Widening country as a mono-beneficiary.	Research-performing organisations seeking to attract an outstanding researcher or innovator and establish a permanent research group.	Attract international scientific leadership; strengthen excellence in a selected field; establish a sustainable research group; reform research governance, recruitment, careers, grant management and knowledge transfer.	General Annex B applies. The applicant must be established in a Widening country. The proposed ERA Chair holder may be from any country but must not already have a contractual relationship with the host. A CV and commitment letters from the Chair holder and institutional leadership are required.

Funding instrument / call	Consortium structure	Target group and scale of operation	Policy objectives	Eligibility criteria
ERA Research Managers	One research organisation in a Widening country as a mono-beneficiary.	Research-performing organisations seeking to establish or reinforce an institution-wide professional research-management team.	Attract experienced research-management leadership; improve grant acquisition, project administration, strategic planning, compliance, knowledge valorisation and institutional research support.	General Annex B applies. The applicant must be established in a Widening country, with only one proposal allowed per legal entity. The proposed Research Manager may be from any country but must not already have a contractual relationship with the applicant. A CV and commitment letters are required.
Excellence Hubs	Cross-border network of at least two regional R&I ecosystems from two different Widening countries, based on the quadruple-helix model.	Regional innovation ecosystems involving academia, businesses, public authorities and societal actors; cross-regional and European scale.	Develop joint R&I strategies and investment plans; strengthen academia–business–society links; align with smart-specialisation strategies; support innovation, technology uptake and opportunities for SMEs, start-ups and spin-offs.	General Annex B applies. The coordinator must be in a Widening country. At least two ecosystems from two different Widening countries must participate. Each ecosystem must represent academia, business, public authorities and societal actors, either directly or through umbrella organisations.

Annex IV Useful links (EC, different networks)

- [HORIZON EUROPE](#)
- [HORIZON EUROPE STRATEGIC PLAN 2025 - 2027](#)
- [HORIZON EUROPE WIDENING PARTICIPATION AND SPREADING EXCELLENCE](#)
- [HORIZON EUROPE REFORMING AND ENHANCING THE EUROPEAN RESEARCH AND INNOVATION SYSTEM](#)
- [HORIZON EUROPE PROGRAMME GUIDE](#)
- [HE WP 2026-2027 WIDENING PARTICIPATION AND STRENGTHENING THE EUROPEAN RESEARCH AREA](#)
- [LIST OF PARTICIPATING COUNTRIES IN HE](#)
- [HORIZON EUROPE NCP PORTAL](#)
- [LUMP SUM FUNDING](#)
- [Lump sum Model Grant Agreement](#), 01.11.2024.
- [WIDERA \(widening\) INFO DAY](#) (January 22, 2026)
- [WIDERA \(ERA\) INFO DAY](#) (December 11, 2025)

Annex V Analysis of Twinning Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2023-ACCESS-02-01

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

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

Evaluators’ Comments	
Excellence	
Objectives	‘The proposal sets out clear, measurable, verifiable and achievable objectives that are fully aligned with the objectives of the WIDERA Twinning call ‘. ‘The objectives are directly linked to strengthening the scientific and innovation capacity of the Widening institution through collaboration with internationally leading counterparts. ‘The proposal clearly demonstrates how the planned activities will contribute to strengthening research excellence, institutional reputation, research management capacities and researcher mobility. ‘The proposal presents a comprehensive set of KPIs to monitor project implementation and institutional progress’. ‘While the objectives are generally well presented, the measurability and verifiability of some objectives are not fully demonstrated through the proposed KPIs.’ ‘Several objectives appear ambitious considering the project duration and available resources.’
Data Management	‘The project’s data management follows the FAIR principles and is well described, including the consideration of ethical concerns’. ‘The project is fully aligned with the FAIR principles and proposes very good solutions in this direction’. ‘It conforms generally to the FAIR principles, but it does not present a fully detailed set of the relevant technical and administrative approaches’.

Evaluators' Comments	
Excellence	
Open science practices	'Open science practices are well addressed and adequately cover published materials and other data generated by the proposed project'. 'Open access publications, granting of research data and their metadata, using established open-source protocols are among the many actions being considered'. 'Good description of its use of Open Science practices'. 'Open Science practices are addressed in the application only briefly and on a very generic level. The types of data that will be generated in the project are described in detail'.
Gender equality	'The gender equality in this proposal is exceptional. All partners in the consortium are led by female scientists. All partners have a gender equality plan'. 'However, gender equality aspects are addressed only generically, without sufficiently clear, specific actions'.
CSA/Twinning Activities	'The proposal outlines four objectives, three of which are research objectives and only one is related to CSA specific actions'. 'The Twinning activities (i.e. staff exchanges; expert visits; virtual training etc.) and actions on strengthening the research management and administration skills of the coordinating institution are not adequately described'.
Evaluators' Comments	
Impact	
Potential Barriers and mitigation Measures	'Obstacles and barriers to achieving the expected outcomes and impacts (such as political/legal issues, economic factors of social aspects) are very well addressed'. 'The potential barriers that may hinder the achievement of desired outcomes and impacts are well identified and mitigating measures likely to be effective are proposed'. 'The potential barriers and their mitigation measures listed in the proposal are not sufficiently comprehensive and not thoroughly convincing'. 'The analysis of potential barriers is fair, although not entirely exhaustive. The proposed actions to overcome these barriers are not sufficiently convincing, such as those concerning the barriers associated with X activity in the Project'.

Dissemination, exploitation and communication activities	'Knowledge protection by patents and IPR management are well elaborated'. 'The tools for communication activities are appropriate for this type of action. The proposed measures to disseminate the outcomes of the project are appropriate and described in sufficient detail'. 'Communication to wider audiences is only superficially addressed, lacking precise and well-tailored measures'. 'The target audiences, for the dissemination of the potential results of the proposed project, are defined in a way that prioritizes the engagement of participants in the region. Nevertheless, the proposal does not sufficiently address the presentation of outcomes to international peer networks of scholars and other researchers'. 'The exploitation and IPR aspects are briefly discussed without sufficient specific details'. 'Exploitation is inadequately addressed and IP protection is addressed in a very superficial and general way, lacking details on how it will be implemented'.
Evaluators' Comments	
Implementation	

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

Annex VI Analysis of Hop-On Facility Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2025-03-ACCESS-01

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

of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators' Comments	
Excellence	
Objectives	→ The objectives of the proposal are clear and pertinent for the ongoing project. The inclusion of the widening partner will significantly enhance the project objectives. → The objectives of including the widening partner into the already ongoing proposal are clear and pertinent. The proposal's objectives are clearly presented, feasible and relevant to the work programme. → The new Hop-on objectives are clear and highly pertinent to the overall project and can advance ongoing project objectives significantly. → The proposal convincingly describes the enhancement of the project's objectives with the addition of the widening partner. → The objectives are clear and pertinent to the call topic. → The hop-on proposal very clearly addresses the objectives of the original proposal and clearly demonstrates the intended additions and added value by the anticipated new partner. The addition of the widening partner will significantly enhance the ability of the project to advance the state of the art, by providing high-level expertise. → Objectives to include the new partner are clearly described and are fully pertinent. Furthermore, the proposal presents a very clear explanation of widening partner objectives where it will contribute. Additional contribution is quantified and therefore measurable. → The addition of the widening partner will credibly strengthen the consortium in its main objective. → The role of the widening partner and its contribution to the overall objective of the project is very well outlined. → The objectives are clear and pertinent to the call. The widening partner contributes credibly to enhance the project objectives.

Evaluators' Comments	
Excellence	
Data Management	→ The methodology remains sound and the inclusion of the new partner will expand the project to be able to assess the sustainability of the microalgae industry. This is very good. → The monitoring strategy complies with the approach on open science, FAIR practices, data management and management of other research outputs of project, commits to making the acquired data (timeseries) available, as a project result, that will form part of the climate metrics used in the evaluation of both high resolution and coarse-resolution climate models in international assessments such as IPCC. → The overall project methodology will be positively affected as a result of including the widening partner in the consortium. → The inclusion of the new partner is credibly addressed with regard to the project's existing open science practices and data management plan (e.g., in accordance with the FAIR principles). → There are no new elements related to open science and FAIR data management. The new widening partner will fully adhere to the data management plan and open science practices of on going project. → The contribution of this subproject to the data management and open science aspects of the consortium is marginal but within standard practices.
Open Science practices	→ The widening partner is well aligned with the global open science approach of the project, as its existing open science practices, data management and management of research outputs are fully aligned with those of the consortium. → The inclusion of the new partner is credibly addressed with regard to the project's existing open science practices and data management plan (e.g., in accordance with the FAIR principles). → Open science practices are considered and the project aims to maximize its impact by addressing various audiences including local scientific community and civil society. → The new partner will credibly comply with the open science strategy adopted by the project consortium. → Open science practices are well defined according to the FAIR principles. → The pertinence as well as the quality of open science is excellent. → The widening partner will follow the existing open science practices, and it will additionally include the institutional open-access repository for uploading the accepted publications.

Evaluators' Comments	
Impact	
Pathways towards Impact	→ The pathways for achieving the expected outcomes and impacts are credible. → The credibility of the pathways and the contributions from the proposal to achieve the expected outcomes and impacts are excellent. → The pathways to achieve the outcomes and impacts listed in the WIDERA work programme are overall convincing. → The proposal clearly and credibly outlines the impact that the addition of widening partner to the consortium will have. → The extension to include Epi-Lipidomics significantly enhances the credibility of projects pathways to achieve impactful outcomes by addressing a critical gap in molecular stratification of ASCVD. The addition of the new widening partner is expected to have an impact on the outreach of the project, by extending the consortium knowledge and skills in the field of lipidome. → The defined pathways to achieve the outcomes are clearly described, systematic and credible. → The pathways and the contributions from the proposal to the expected outcomes and impacts are credible. For example, the scientific/technical outcomes, such as the development of a more sustainable leaching agent, will dynamize the European recycling ecosystem, leading to positive societal impact. → The activities of the new widening partner are well outlined and are expected to contribute to a great extent to the expected outcomes and impacts of the project. → The pathways towards the impacts expected with the addition of a new partner are presented in detail and credible.
Potential Barriers and mitigation Measures	→ The potential barriers to the achievement of the expected outcomes and impact are appropriately identified, and mitigation measures are appropriately outlined. → The measures to maximize the expected outcome are well positioned for improving the impact of the initial project. → The measures to maximize expected outcomes and impact seem reasonable. However, the widening partner did not provide explicit actions towards contributing to the impact strategy of the original proposal. → Measures that will extend the scale of impact are clearly described, including additional sections in D6.3 relating to knowledge transfer. → The proposed measures in the dissemination plan, together with the proposed communication activities, will credibly maximise the expected outcomes and impacts.

Dissemination, exploitation and communication activities	→ The contribution of the new widening partner is partially included in the communication, dissemination and exploitation strategies of the project. → The suitability and quality of the communication, dissemination and exploitation measures to maximise expected outcomes and impacts are excellent. → Dissemination, exploitation, and communication are well described including dissemination of knowledge. → The contributions of the widening partner are integrated into the project's communication, dissemination, and exploitation strategies. The widening partner will participate in disseminating project results through regional and international conferences, open-access publications, and local outreach activities. The widening partner involvement in dissemination enhances its visibility within the consortium and contributes to the project's overall impact. → The contribution of the widening partner to the project's communication and dissemination strategies is positively demonstrated. Specifically, dedicated communication activities are outlined, along with the use of appropriate channels (e.g., the project website and social media). Moreover, convincing dissemination measures are proposed, including typical routes such as publications in peer-reviewed journals, presentations at conferences, open access publications, and clustering with EU initiatives. → Dissemination, exploitation and communication is extensively considered, and notably in the languages represented in the consortium. This hop-on project will deliver new data to be dissemination within the project and with the wider scientific community through the usual means, and stakeholders, and increasing public awareness through various means. The widening partner will be deeply involved in the communication and dissemination activities of the project, with a clear and well-defined plan. The dissemination and exploitation plan is well-suited to maximize the scale and significance of outcomes - it includes adequate measures to ensure FAIR data sharing, stakeholder engagement, and integration into clinical frameworks. → Moreover, dissemination via social media and the widening partner's network will support the adoption of the technology within the medical community. → The suitability and quality of the communication, dissemination and exploitation measures to maximize expected outcomes and impacts are very good. The way in which the contribution of the widening partner will be integrated into the existing communication, dissemination, and exploitation strategies in WP6 is credible and effective. For example appropriate dissemination measures are planned, including open access publications, press releases and participation in specific industry events highly relevant to the project such as the European Recycling Conference. → The proposed measures in the dissemination plan, together with the proposed communication activities, will credibly maximise the expected outcomes and impacts. The additional Portugal case study will credibly enhance the reach and dissemination scope of the project in the Atlantic Ocean region. For example, the planned final workshop targeting the floating offshore wind industry and short courses for practitioners are suitable dissemination measures. → The inclusion of the widening partner in the overall AquaPlan dissemination activities is convincingly detailed. → Outreach, dissemination and engagement are appropriately introduced as part of a dedicated work package "WP6: Mindshare & education". → The suitability of the measures to maximize expected outcomes and impacts is well demonstrated in the relevant activities set out in the dissemination and exploitation plan.
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Evaluators' Comments	
Implementation	
Work plan	→ The work plan relating to the contribution of the new partner clearly shows where and how the new partner is involved in the existing project and workpackages, with clearly identified tasks, deliverables and milestones. → The work plan has been updated to include the new activities, introducing new tasks and deliverables within the existing proposal's architecture. The activities of the widening partner will be convincingly distributed among one technical work package (WP3) and a work package related to management and dissemination (WP4). The additional tasks are proportionate to the scale and complexity of the work and are credibly described. → The hop on project will form an additional work package led by the new partner that integrates into the overall project. The approach aligns with three current work packages. Gantt chart detailing shows the spread of the three tasks of the new WP. → The work plan appears effective considering the expertise of the widening partner in optical systems and biosensors development, which indicates that the proposed studies in the new WP (WP8) will be feasible and that the contribution to WP4 will be relevant. → The quality and efficiency of the work plan and the appropriateness of resources overall is good. → The work planned for the widening partner is clearly delineated into two new tasks (T3.4 and T4.4) and new deliverables are specified as well as contributions to existing tasks. All these changes to the work plan are detailed by work package, clearly stating what activities the widening partner will perform. → The work plan is coherent, well-structured, and the overall description of tasks is comprehensive. The role of the widening partner is clear, and the distribution of efforts is in- line with the objectives of the project. → The work plan is clearly presented. However, Pert and Gantt chart are missing.
Milestones/ Deliverables	→ The role of the widening partner is well-defined and credibly reflected in the description of tasks, deliverables and milestones. → Milestones are less convincing as there is only one mentioned at M28, which is not sufficient for monitoring progress. → Three new deliverables (D3.11, D4.4 and D5.4) are clearly described. No new milestones are proposed. → The risk assessment of the widening tasks is appropriate, and the corresponding mitigation plan is suitable and credible.

Capacity of participants and Consortium as a whole	→ The capacity and role of each participant, and the extent to which the consortium as a whole brings together the necessary expertise are excellent. → The proposal includes a sufficiently detailed description of the profile of the new partner, whose contribution are important, explicit and well-identified. → The role and capacity of the widening partner is credibly defined and demonstrated. The widening partner has the necessary expertise and skills to conduct the proposed work in line with the proposal's objectives, and the partner brings together the necessary disciplinary and inter-disciplinary expertise to join the consortium. The new partner has the capacity to carry out all the assigned tasks and roles due to its expertise in in-situ and operando X-ray scattering experiments and synchrotron-based techniques. Moreover, the complementary function of the new partner within the consortium significantly strengthens the project objectives via a unique approach to developing SSBs. → The widening partner has consolidated expertise in lipidomics and is recognized worldwide as a leader in the field. Therefore, it has the capacity to carry out the work described in the proposal and would represent an added value for the ongoing project. → The widening partner's expertise in biophotonics complements that of the consortium in areas such as physiological instrument development, clinical research, and data science, and the consortium as a whole brings together the necessary expertise. → The complementary profile and capacity of the widening partner within the consortium convincingly enables the bridging of computational simulations with practical applications, thereby significantly strengthening the project, and providing a unique approach towards battery recycling. → The role, profile and capacity to carry out the work, as well as the added value of the widening partner are credible and demonstrated. → The widening partner's role in the overall project is clearly outlined and appropriately addresses a shortcoming of the original project proposal.
Risk Assessment and Mitigation measures	→ Overall, the risk management is well addressed. Most critical risks are appropriately identified, and suitable mitigation measures are proposed for the technical risks. For example, the risk that the design parameters of the original project are not suitable for the Atlantic Coast site is credibly mitigated by adapting the design envelope to the new site. → The proposal presents a set of potential issues and their corresponding mitigation measures, which is appreciated. However, the relationship between the risks identified and the previously presented activities is not clearly outlined. → Two additional risks arising from the work to be performed by the new partner are identified (even though some likelihood and severity data are missing) and suitable mitigations proposed. → The risk assessment of the widening tasks is appropriate, and the corresponding mitigation plan is suitable and credible. → Critical scientific risks are identified and appropriate mitigation measures presented. Efforts assigned to WPs are appropriate as described, and necessary amendments clearly indicated. → The deliverables and milestones are well-defined, and the risks are well thought. → Risk management is very well elaborated. Critical risks, such as delays in component availability and resource shortages, are identified, along with appropriate mitigation measures.

Annex VII Analysis of EIC pre-accelerator Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2025-02-ACCESS-01

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

procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators’ Comments	
Excellence	
Objectives	‘Objectives are clear, measurable, feasible and supported by KPIs.’ ‘The technological and business objectives, although described in an extremely succinct manner, are all SMART. In particular, the KPIs for business development are concrete and measurable, although they appear to go beyond what is required by a pre-acceleration programme’ ‘Business objectives are clearly separated from technological objectives.’ ‘TRL progression is credible and consistently reflected throughout the proposal.’ ‘The proposal defines clear objectives for advancing both the technology and the business model. However, several feasibility gaps emerge when assessing the specificity, achievability and operational realism of the objectives and KPIs.’
Technological breakthrough	‘The technology demonstrates a high degree of novelty through integration of existing technologies into a unified solution.’ ‘Commercial potential is considered strong where a clear market need and value proposition are demonstrated.’ ‘Benchmarking against state-of-the-art and commercial competitors is often insufficiently detailed.’ ‘Performance advantages should be substantiated with quantitative comparisons.’ ‘Novelty based only on software integration is not always considered disruptive.’ ‘Validation against state of the art and previous commercialisation experience strengthen credibility.’

Methodology	'The timing appears broadly appropriate, and the methodology outlines a structured plan for scale-up and progression toward commercial deployment.' 'The timing for this technology/innovation is unclear. The current TRL is not provided. This is a significant weakness.' 'The starting TRL of the proposal is already TRL 5 completed/6 as claimed by the proponents. The objectives are clearly aimed at achieving full system qualification for commercial use, since an operational prototype already exists.' 'The gender dimension has been duly taken into account. Considerations on the open science approach are underdeveloped, except for the mention of the development of standards for public goods. This is a shortcoming'.
Evaluators' Comments	
Impact	
Credibility of impacts	'The business model is based exclusively on a projected revenue trajectory. However, the strategy for gaining end-user acceptance, gathering feedback, and validating the model is not provided, making the model's suitability for a pre-accelerator proposal unclear. This is a shortcoming.' 'The proposal presents ambitious and well-articulated commercial impacts, including revenue growth, digitisation of the x segment and the creation of new market standards. The narrative is coherent; however, several elements weaken credibility at this stage.' 'Overall, the proposal outlines substantial and desirable impacts with a plausible logical chain, but their credibility is constrained by ambitious adoption assumptions, limited multi-market validation, unsubstantiated market-standard claims and dependency on behavioural shifts that remain to be demonstrated at scale.' 'The IP assets have been listed together with the IP strategy and exploitation in a concise but convincing manner. The dissemination and communication plans are not fully convincing due to their extreme conciseness and the limited nature of the actions to be undertaken. This is to be considered a minor shortcoming.'
Economic and societal benefits	'The proposal presents economic and societal benefits with strong scale-up ambitions, but credibility is weakened by optimistic assumptions and unaddressed barriers.' 'The economic, social and environmental benefits are described and quantified in concise lists that show the project's interesting potential in terms of SME competitiveness (cost savings), work-life balance for commuters (time savings) and decarbonisation (commute reduction).' 'Overall, while the proposal articulates promising economic and societal benefits aligned with EU competitiveness, digitalisation and sustainability objectives, the scale-up potential and wider EU-level impacts remain not yet sufficiently substantiated, as they rely on ambitious adoption assumptions and limited evidence of replicability across diverse European markets.'
Investment readiness and go-to-market	'The proposal presents a well-structured plan toward investment readiness, including actions on IP protection and initial market validation. However, several shortcomings constrain the credibility of the team's readiness and the feasibility of the go-to-market path.' 'The IP strategy includes freedom-to-operate checks and planned patent filings, yet the timing raises risks.' 'Market validation remains limited. Early pilots delivered only modest paying-customer traction, insufficient to indicate replicable demand across Europe. While Letters of Intent suggest interest, no concrete conversion plan is described, weakening investor confidence in scalability of willingness-to-pay.' 'Overall, the proposal outlines a directionally coherent path toward commercialisation, but the current level of market validation, financial substantiation and competitive defence is not yet sufficient to convincingly demonstrate full investment readiness at this stage. These gaps constitute important shortcomings rather than fundamental weaknesses, and addressing

	them would materially strengthen the investment case.'
Evaluators' Comments	
Quality and efficiency of implementation	
Quality and motivation of the team	'The team's motivation is clear. However, the information provided about their scientific/technical background is insufficient for a precise evaluation of their expertise. The absence of publications, prior projects, or patents reduces confidence in the team's ability to bring the new technology to market. This is a shortcoming.' 'The team has the necessary experience to implement the proposed innovation optimisation process and to achieve full system qualification for commercial use. The personal investment of time and financial resources in the development of the proposed innovation demonstrates the high motivation of the proponents. A convincing team expansion plan has also been defined to support the innovation optimisation process and its qualification process.' 'Overall, the proposal outlines a directionally coherent path toward commercialisation, but the current level of market validation, financial substantiation and competitive defence is not yet sufficient to convincingly demonstrate full investment readiness at this stage. These gaps constitute important shortcomings rather than fundamental weaknesses, and addressing them would materially strengthen the investment case.'
KPIs, milestones and risks	'Technology, business and impact KPIs have been defined, are appropriate, measurable and support the milestones indicated. The latter appear consistent with the stated objectives and cover both technological and go-to-market aspects.' 'The main risks have been identified and the mitigation measures proposed appear adequate.' 'Overall, KPIs and milestones are well constructed, measurable and aligned with the project's trajectory, though success will depend on demonstrating achievability under real market conditions and strengthening fallback capacity'
Workplan and resources	'The work plan is divided into five work packages, supported by the lump sum funding model. The five WPs address technology development, market validation, management, and dissemination, illustrating the connections among them. The selected funding rate is 70%. The monthly average personnel costs for the Coordinator are over the 80th percentile on the Lump Sum Dashboard. This is a shortcoming.' 'The distribution of effort across work packages is logical and reflects their relative technical and commercial complexity. The highest allocation is directed toward core technological development and AI/ML implementation, which is appropriate given their criticality for achieving TRL advancement and market readiness.' 'Overall, the work plan and allocation of resources are well balanced and support successful project execution.' 'The Excel file is not formatted correctly and, like part B of the proposal, which also suffers from formatting problems, makes it rather difficult to assess its appropriateness, and this is a shortcoming.'

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

Topic Identifier: HORIZON-WIDERA-2023-TALENTS-01-01

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

procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators’ Comments	
Excellence	
Objectives	The project objectives are pertinent to the ERA Chair Work Programme priorities. Project objectives are clearly defined, and each goal is linked to KPIs and relevant elements within the Work Programme. Objectives are measurable, verifiable, and achievable. KPIs are credible, indicating, for example, specific targets, staff numbers and percentage of expected results. The proposal, specifically the SWOT analysis, adequately pinpoints the structural changes needed for the institution and ERA Chair Holder to attract and maintain an excellent research and management team. The project objectives are very well defined and pertinent. Each objective is supported by a measurable set of results (KPIs), allowing its verification. The proposal is pertinent to the work programme; the main objectives are convincing and clearly articulated. The proposal provides a clear assessment of the current situation in the host research centre and the challenges to be faced by the project, also underscoring the strengths upon which the future can be built The project’s objectives are extremely pertinent to the work program.

Data Management	→ The research data management and management of other research outputs is well in line with the FAIR principles. → The proposed research data management is in line with FAIR principles. → The research data management is very well planned and meets the requirements of FAIR principle. → Research data management and the management of other research outputs are adequately described and clearly in line with FAIR (Findable, Accessible, Interoperable, Reusable) principles. → Data Management Plan is fully addressed in the proposal including information on data findable, accessible, interoperable, and reusable. → Research data management is fully in line with FAIR principles.
Open science practices	The proposal credibly incorporates open science methodologies, which are appropriate to reaching the objectives and which will be integrated in the methodology. The proposal will adhere to the Horizon Europe Open Science principle 'as open as possible, as closed as necessary' and has an established data management policy. IP limitations are restricted primarily to cases of national legislation and practice and the protection of emerging researchers. → Open science practices are implemented as integral part of the project and are relevant to the concerned experimental studies. → Open Science practices in terms of Open Access to publications and research data are very well considered and in a comprehensive manner. → Open Science practices for citizen engagement and multi-actor approach are very well planned through the active integration of the Regional Smart Specializations Quadruple helix community and involvement of the civil society organization. → The Open Science Practices are explicitly accommodated by the planned work and delivery of the objectives, implemented as an integral part of the proposed methodology, in relation to the proposal activities on data management and sharing. → Compliance with Open Science practices and FAIR principles is properly described and analyzed per activity. → Open Science practices are explicitly engaged in all relevant areas (work, recruitment, deliverables) pertinent to the objectives, and they are integral to the corresponding methodology.
Gender equality	→ Gender objectives are sufficiently considered with regard to recruitment, and the coordinator institute declares that a gender equality plan has been already prepared. → The proposed actions will help for reducing the gender gap in the specific field of research of the proposal, with gender-sensitive recruiting policies. → The coordinating institution has committed to apply the principles of gender equality for both the personnel recruitment process as well as for the data collection and analysis aspects of the proposal in line with the ERA objectives.
CSA/Twinning Activities	→ The quality of the proposed coordination and the support measures is excellent. → A comprehensive and scientific approach to all aspects of the methodology including coordination and support action is taken. → The proposed coordination and support measures, and the relative methodology to implement them, are clear and sound. → The quality of the proposed coordination and support measures is excellent with the

	interdisciplinary character of the proposed collaborative research being of particular merit. → The method of attracting an eminent academic to animate and drive the proposed coordination and support measures is, overall, properly programmed and well thought. → The proposed coordination and support measures are of high quality and highly effective. They include up-to-date, internationally recognized and tested approaches, and they will positively draw upon actual direct managerial and leadership experience in leading high-profile research centers of the ERA Chair holder.
Evaluators' Comments	
Impact	
Pathways towards Impact	→ The pathways to achieve the expected outcome on system and organisation level are credible and very well addressed in the proposal, with the scale and significance appropriately demonstrated through the provided KPIs. → Pathways to achieve the expected outcomes at the system and the organization level are properly outlined and are relevant for the project. → To follow the performance and the impact created by the ERA Chair, different key impact pathways have been considered, for the scientific, societal, and economic impact areas., especially at the institutional changes and improvement of human resources, the pathways to reach the expected outcomes and impacts are adequately evidenced. → The pathways to expected outcomes concerning the scientific visibility on national level created by the research team are concretely and sufficiently presented. → The pathways contributing to the expected impacts are indicated and credible. → The pathways to achieve the expected outcomes and impacts of this proposal are in large part credible. The proposed project has the potential to contribute to the preparation and implementation of the Smart Specialisation Strategy of the host country, which is a strength.
Potential Barriers and mitigation Measures	→ The proposal identifies the three main barriers concerning the research and innovation system, which may make it difficult to achieve the declared objectives. The targeted barriers are valid and the suggested solutions to overcome these barriers are effective. → Potential barriers and obstacles to expected impacts achievement have been properly identified. Mitigation measures as a response to some obstacles have been included in the proposal. → The barriers to achieve specific impacts (e.g., integration of the existing team, sustainable creation of permanent positions etc.) are sufficiently elaborated and mitigation measures are appropriately considered. → The potential barriers arising from factors beyond the scope and duration of the project are identified and sufficiently discussed. → Barriers to impact achievement are clearly identified, for example, public funding limitations and policy issues. The means by which such barriers will be overcome are adequately considered. → Potential barriers and obstacles have been properly identified by the SWOT analysis. → The proposal clearly discusses potential barriers and proposed mitigating measures are overall credible.

	→ The proposal takes into account the potential barriers in relation with the outcomes of the impact, and also provides a series of proposed mitigation measures. → The potential barriers arising from factors beyond the scope and duration of the project are correctly and successfully identified and dealt with.
Dissemination, exploitation and communication activities	The dissemination and exploitation plan, including communication activities, to be performed during and after the project are highly suitable, diverse, realistic, proportionate to the scale of the project, and are fully supported by the coordinating institute's strong track record of research dissemination and public engagement, as well as of inter-sectoral training events → The proposed dissemination activities are adequate for the action and are proportionate to the scale of the action. → Different valuable communication activities are proposed; some of them are dedicated to non-specialists. → Valuable exploitations actions are foreseen including patenting, grant applications, participation in the networks and spin-off formation. → Measures proposed for the dissemination, communication, exploitation of results are of high quality and very well planned, covering a wide range of activities targeted at thoughtfully selected audiences. → The approach to the communication, dissemination and exploitation strategy is built on previous EU research findings and best practice guidance. → The communication activities for various target groups with very clear communication messages are very well structured and suitable for the project. → The dissemination, exploitation and communications activities have been drafted with care and attention and are suitably congruent with the scale and quality of the project. → Dissemination and communication measures are of high quality and are credible with well established and appropriate practices such as workshops and summer schools being used. Effective qualitative and quantitative KPIs to measure the effectiveness of both dissemination and communication activities are clearly provided. → Exploitation is adequately addressed with exploitable outputs being clearly identified. → The dissemination actions are well determined and relevant. The initial exploitation actions are adequately elaborated. The identified communication means, and specific measures are adequate with respect to the work to be done. → The dissemination and exploitation plans are well addressed and provided in detail with measurable indicators, that are visible and are directly related with the methods to maximize impact.
Evaluators' Comments	
Quality and efficiency of implementation	

Work Plan	→ The quality of the work plan is excellent. → The overall work plan is appropriate for the objectives and tasks planned in the proposal. → The work plan is coherent, effective, and divided into well-structured work packages (WPs) addressing the main scientific objectives. → The presented work plan is well structured, clearly laid out and covers well the intention of and work envisaged in the proposal. However, the entire work plan is relatively over- resourced. → The work plan is well structured and appropriate to the achievement of project objectives. The work packages are well detailed with the presented timings being appropriate. → The work plan is very well structured and outlined with sufficiently well-defined Work Package objectives that are further broken down into individual tasks, properly reflecting the expected outcomes of the action. → The work plan is overall well-structured and coherent to the work to be done. The timing of the five work packages, their components, their interrelations and the identified deliverables are very well elaborated. → The work plan is divided in distinct and clearly described WPs with targeted tasks and objectives. → The work plan is very well designed and will effectively support the implementation of the project, the timing and interrelations of the WP being clear and orderly.
Milestones/ Deliverables	→ The definition of deliverables is very good. → Deliverables, as well as Milestones are appropriately defined and adequately scheduled during the project. → Deliverables, milestones and work packages are well connected. → The six work packages are described in detail, with matching steps, milestones and deliverables. → Milestones are clearly identified and referenced in a table, along with relevant means of verification. → Each WP is subdivided with a number of clearly identified KPIs and deliverables. → Deliverables and milestones are clearly presented with their number and relevance being suitably given the size of the project. → There is a comprehensive list of deliverables and milestones which are sufficient in number and well planned throughout the duration of the project, without overloading the progress monitoring activities. Another positive aspect is that all deliverables will be of public access. → The identified milestones are relevant as well as the corresponding verification means. However, there are some significant milestones which are not explicitly emphasized in the proposal. → Milestones are properly provided and related with specific intervals and activities of the project. → The proposed deliverables fit well into the work plan. Milestones are calibrated and linked to plausible means of verification.

Capacity of participants and Consortium as a whole	→ The capacity of the hosting institution matches well the project's objectives, including bringing together the necessary expertise. → The proposed ERA Chair holder is a highly experienced and an internationally well-reputed researcher with a strong track-record in directing and managing multidisciplinary scientific infrastructures and research groups. → The capacity of the hosting institution and the ERA Chair holder is very well presented in terms of research capacity as well as financial and organizational aspects. → The proposed ERA Chair is an excellent candidate with an appropriate track record and expertise to carry out the project. In addition, the project team as a whole is impressive. → The institution hosting the ERA Chair holder has the capacity to fulfil its obligations. → The capacity of the hosting institution and the ERA Chair holder match the project and call objectives. → Both the hosting institution and the ERA Chair holder demonstrate existing resources to provide and then develop the critical infrastructure to carry out the project activities. → Each party has a valid role and sufficient capacity to fulfil that role. → The expertise and experience of the proposed ERA chair in terms of science and innovation is very well aligned with the objectives of the project. → The capacity of the coordinator is excellently demonstrated. → The chosen ERA Chair has a high-class academic profile, which matches very well with the project's objectives, the needs of the host institution, and the proposal's expectations. → The profile of the ERA Chair brings together all the necessary competencies for the successful completion of this project. → The host institution demonstrates strong expertise for implementing the project's activities and its contribution to the planned work via its selected team members with the ERA Chair holder is evident and well articulated. → The ERA Chair holder, as well as the team that is to be involved in the project, have the capacities that are needed to successfully operate and implement the different
Risk Assessment and Mitigation measures	→ A solid risk assessment and mitigation strategy plan are presented with an interpretation of both the likeliness that risks will occur and the impact that risks may have. → The risk assessment and contingency measures to overcome the risks related to team building, and scientific activities are rather generic and not sufficiently detailed. → The critical risks relating to project implementation are properly identified and sufficiently discussed. Most of the identified risks are assessed as "low" to "medium" likelihood and medium/high severity, which is adequate. → Overall, the risk assessment is of a good quality. Critical risks and suitable mitigation measures are clearly described.

	→ Implementation risks have been properly identified and corresponding contingency measures have been adequately considered. → The identified risks are all relevant and the corresponding contingency measures are credible and sufficiently detailed. → Critical risks and the measures to mitigate these risks are properly provided and analysed. In addition, the specific risks are linked with specific WPs including the level and severity of each risk. → The critical risks relating to project implementation are properly identified. The corresponding proposed mitigation measures are generally appropriate with some exceptions.
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Annex VIII Analysis of Excellence Hubs Evaluation Summary Reports (ESRs)

Topic Identifier: HORIZON-WIDERA-2023-ACCESS-07-01

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

procedure for each of the criteria, addressing at the same time the most common comments included in the ESRs. Comments were extracted from several of the project proposals approved for funding, randomly selected.

Evaluators’ Comments	
Excellence	
Objectives	→ The objectives of the proposal are very clear. → The objectives are also pertinent to the Work Programme and address very well the need for place-based innovation ecosystems. → The objectives are very pertinent with the call topic, and they are fully aligned with EU, national and regional policy objectives respectively. → The specific objectives are very clearly stated, measurable, verifiable, ambitious and realistically achievable. → The objectives are properly focused on the long term. → The general and specific objectives are clear, measurable and pertinent to the Work Programme. → The proposed project objectives are very clearly presented and very well structured. → The proposal is firmly aligned with the key objectives of the Widening Component of the Work Programme. → The connection between the project objectives and the scope of the call is excellently described. → The objectives are very well-formulated and fully in line with the call. Each of them is underpinned with key performance indicators which are clearly quantified, credibly related to the objectives, and therefore measurable.

Data Management	→ Research data management and management of other research outputs is in line with FAIR guidelines. → The management of research outputs fits the FAIR principles. → The proposal convincingly demonstrates that the research data management will be in line with the FAIR principles. → The project will be fully compliant to FAIR principles. → Data management procedures and protocols are well catered for and will be organized according to FAIR principles.
Open science practices	→ Open Science approaches are adequately presented, with some recommended activities such as involving citizens, civil society and end users in the co-creation of R&I agendas and contents. → Open Science practices is duly detailed with open sharing research, open access publications and some open software/tools. → Open Science practices are well addressed. → The proposal appropriately supports an open access policy for scientific publications and will take all necessary actions to ensure free access to peer-reviewed articles resulting from the project. → Open science is appropriately approached. The open science practices and the data management meet the requirements of the call, using freely accessible Open Access Repositories. → Furthermore, open science practices will be implemented as an integral part of the methodology. Open science practices are well considered, taking into account open sharing of results and ensuring their quality and transparency.
Gender equality	→ Despite the fact that gender is not an issue for this proposal the gender equality within the consortium is well intended. → Gender dimensions along with sensitivity to age, ethnicity, socioeconomic and other social factors are integrated in the proposal. Three gendered-innovations are presented, and these are in line with the main requirements of the call.
CSA/Twinning Activities	→ The proposed coordination and support measures are of very good quality. → The quality of proposed coordination and support measures is excellent and is very clearly depicted. → Measures for staff exchanges, twinning of activities between ecosystems, skills development for research and innovation management and citizen engagement represent an added value. → The coordination and support measures for scaling up and intensifying the collaboration

	between the two hubs are effective. → The proposed coordination and support measures are of very high quality and very appropriate. → The proposed coordination and support measures are sufficiently outlined.
Evaluators' Comments	
Impact	
Pathways towards Impact	→ The pathways to achieve the outcomes of the project in the medium term are credible. → The pathways described to achieve the expected outcomes are credible, well developed and progress beyond the state-of-the-art. → The pathways to achieve the project outcomes and impacts identified in the Work Programme are highly credible and excellently discussed through scientific, social and economic impacts which have been convincingly demonstrated at national and international levels. → Pathways to achieve the expected outcomes and impacts specified in the WP are clearly presented and credible. The pathways comprise an innovative mix of traditional and novel approaches. → The pathways to achieve the project outcomes and impacts identified in the Work Programme are highly credible and well discussed.
Potential Barriers and mitigation Measures	→ Potential barriers, that may determine whether the desired outcomes and impacts are achieved, are appropriately identified, and appropriate mitigation measures are proposed. → Three main potential barriers to the development of the plan are identified and appropriate mitigation measures are available for two of them. → Moreover, the identified requirements and potential barriers that may affect the achievement of the proposal's outcomes & impacts, and the respective mitigation measures are very well presented and thoroughly discussed and considered. → A number of pertinent potential barriers are identified in the proposal and relevant mitigation measures proposed. → The proposal properly identifies relevant social, political and regulatory, and technical barriers. Mitigation measures proposed are in general convincing. → Potential barriers have been appropriately identified and address technical barriers, regulatory barriers as well as security protection and liability barriers. The mitigation measures for each of the barriers are adequate and pro-active. → The proposal briefly identifies potential barriers to the expected outcomes and the corresponding mitigation measures.
Dissemination, exploitation and communication	→ The quality of the dissemination actions is very good. The quality of the communication actions is very good. The quality of the preliminary exploitation actions is very good. → The proposed dissemination activities are adequate for the action and are proportionate to the scale of the action. → Different valuable communication activities are proposed; some of them are

	dedicated to non-specialists. → Valuable exploitations actions are foreseen including patenting, grant applications, participation in the networks and spin-off formation. → Measures proposed for the dissemination, communication, exploitation of results are of high quality and very well planned, covering a wide range of activities targeted at thoughtfully selected audiences. → The approach to the communication, dissemination and exploitation strategy is built on previous EU research findings and best practice guidance. → The communication activities for various target groups with very clear communication messages are very well structured and suitable for the project. → The dissemination, exploitation and communications activities have been drafted with care and attention and are suitably congruent with the scale and quality of the project. → Dissemination and communication measures are of high quality and are credible with well established and appropriate practices such as workshops and summer schools being used. Effective qualitative and quantitative KPIs to measure the effectiveness of both dissemination and communication activities are clearly provided. → Exploitation is adequately addressed with exploitable outputs being clearly identified. → The dissemination actions are well determined and relevant. The initial exploitation actions are adequately elaborated. The identified communication means, and specific measures are adequate with respect to the work to be done. → The dissemination and exploitation plans are well addressed and provided in detail with measurable indicators, that are visible and are directly related with the methods to maximize impact.
Evaluators' Comments	
Quality and efficiency of implementation	
Work Plan	→ The proposed work plan is of high quality and demonstrates a well structured strategy for implementation. → Work packages are generally well described and are proportionate to the scale and complexity of the proposed project. A well-designed Gantt chart clearly shows what has to be done and when. → The work packages are coherent with the project aims and objectives and are effectively structured and interrelated. → The work plan is effectively developed and the interrelation of the work packages is appropriate. The resources assigned to the work packages are properly allocated to the different types of costs and are aligned with the objectives. → The work plan is comprehensive and robust, containing all the necessary elements for the successful implementation of a high-quality CSA. → The work plan reflects the proposed methodology in an excellent way. → The work plan is very well-structured and well described regarding strategy; R&I projects; action and investment planning in line with the Work Programme.

	→ The work plan is of very good quality, coherently structured and very effective. The Work Packages (WPs) follow a logical structure, have an appropriate timeframe and interconnections between them.
Milestones/ Deliverables	→ The proposed deliverables are well thought out. → Milestones and deliverables are well specified and timed to allow for the effective monitoring of the proposed project's progress. → The work packages are accompanied by many appropriate milestones and deliverables. → The milestones and deliverables of the proposal are very good and appropriately distributed in the time plan in order to provide efficient means for good progress control of the proposed work. → A brief but relevant set of key milestones is presented for the project. → There is a credible set of integrated and coherent work packages and deliverables addressing key activities required for the successful undertaking of the project. → Deliverables and Milestones are coherent with the work in every work package. → The comprehensive list of deliverables and milestones allows for the monitoring of progress. This is excellent.
Capacity of participants and Consortium as a whole	→ The proposal demonstrates that the consortium as a whole brings together the necessary expertise to implement a project of this scale. → The consortium matches the project's objectives and brings together the necessary disciplinary and interdisciplinary expertise, along with social science and open science experience. → The members of the consortium complement each other and there is a good balance between western European partners that are active in multiple ecosystems and those in the consortium with less experience. → There is very good complementarity of skills and expertise among members of the consortium with very little overlap. → The leaders are well known experts in the field and have high-level skills needed for efficient coordination. The collaborating partners participate actively in the work packages. Each partner has the resources, infrastructure and skills to fulfil their complementary roles and tasks. → Each partner participates actively in the project and is fully engaged, with clearly assigned roles. → All the partners have a clear role to carry out the proposed action. → The consortium as a whole is very well-built/structured and assembles the requisite expertise and disciplinary and inter-disciplinary knowledge for the achievement of the project's objectives. The partners complement each other. The Consortium meets all the requirements for this call topic.

Risk Assessment and Mitigation measures	→ Well considered critical risks relating to project implementation are identified and rated according to their likelihood and severity. Suitable associated mitigation measures are proposed. → Critical risks related to the proposed project implementation are clearly identified and assessed, and appropriate mitigation measure are proposed. → Critical risks related to the implementation and mitigation measures for the non-research components are well considered and acceptable. → The proposal includes a credible list of critical risks for implementation as well as corresponding mitigation measures. → A very credible and well-formulated set of critical risks is presented. A convincing set of mitigation measures is proposed. → Overall, the critical risks for implementation are very well identified and qualified, and appropriate mitigation measures are proposed. The risks are considered in a very structured way and are clearly articulated including scores. → The proposal identifies several potential critical risks, based on their severity and impact, which may adversely affect successful implementation, and presents convincing mitigation measures for all of them.
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