#innovacion
#ayudascdti
#asesoramiento
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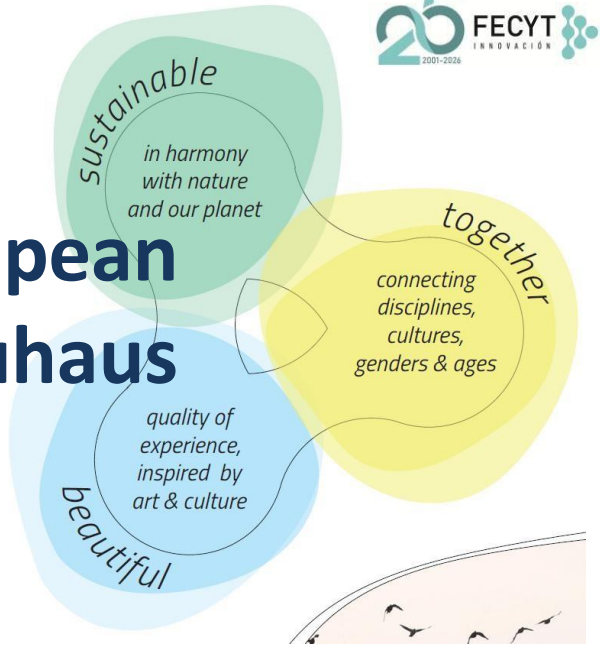
25 2001-2026 FECYT INNOVACIÓN

New European Bauhaus



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Adeline Marcos
NCP Cluster 2 Cultura y Creatividad / New European Bauhaus

Carlos Toledo
NCP Cluster 4 Industria / New European Bauhaus

Vuestro cliente es el evaluador!!!!!

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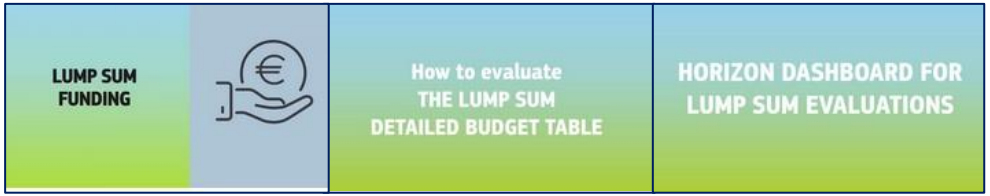
Revisa la info que tienen los evaluadores

Content

Horizon Europe: An EU R&I programme	About Horizon Europe
	The impact logic in HE work programmes
	Overview of the evaluation procedure
Standard evaluation procedure	Evaluation criteria per type of action
	How to evaluate proposals
Individual evaluation and scoring	Evaluating the excellence, impact and quality of the implementation criteria
	Additional questions in the evaluation form
	The role of independent experts
Guiding principles	Confidentiality
	Conflicts of interest
Additional Information	Observers
	Implicit gender bias
	Logistic
Annexes	Evaluating Lump sum proposals
	Evaluation COFUND proposals



[Horizon Europe Proposal Evaluation – Standard Briefing (05/07/2024)]

[F&T Portal -Videos]

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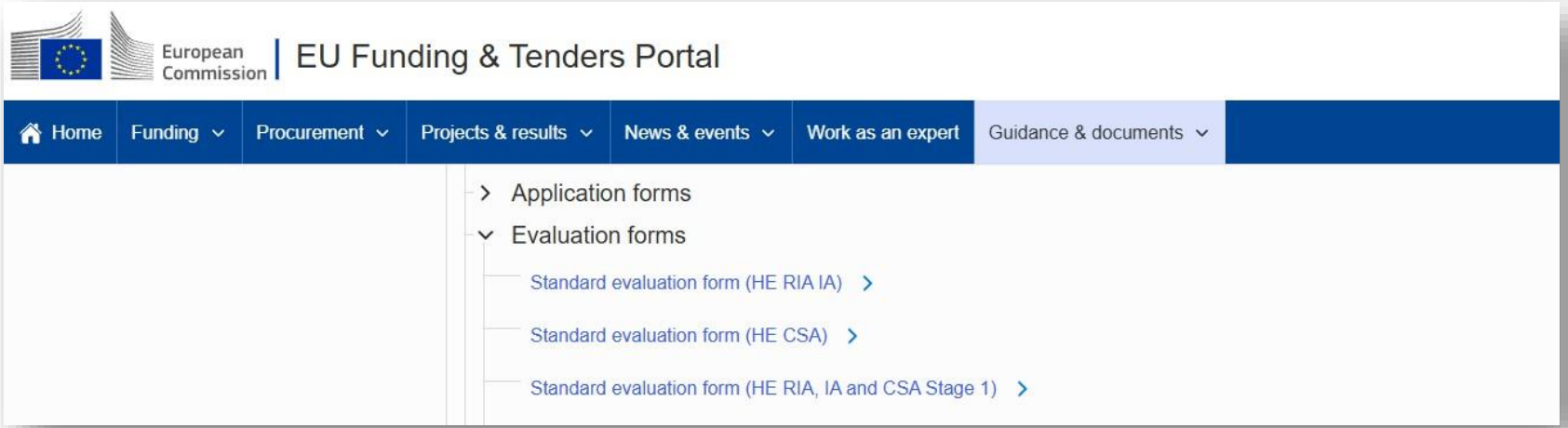


Responded a los criterios de evaluación en la memoria

EXCELLENCE

- ✓ Clarity and pertinence of the **project's objectives**, and the extent to which the proposed work is ambitious, and goes **beyond the state-of-the-art**.
- ✓ Sc… **m**… concepts, models, assumptions, inter-disciplinary approaches, appropriate consideration of the **gender dimension** in research and innovation content, and the quality of **open science practices** including sharing and **management of research outputs** and **engagement of citizens, civil society and end users** where appropriate.

IMPACT

- ✓ Credibility of the **pathways** to achieve the expected **outcomes and impacts** specified in the work programme, and the likely scale and significance of the contributions due…
- ✓ Suitability and quality of the **measures to maximize expected outcomes and impacts**, as set out in the dissemination and exploitation plan, including communication activities.

QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

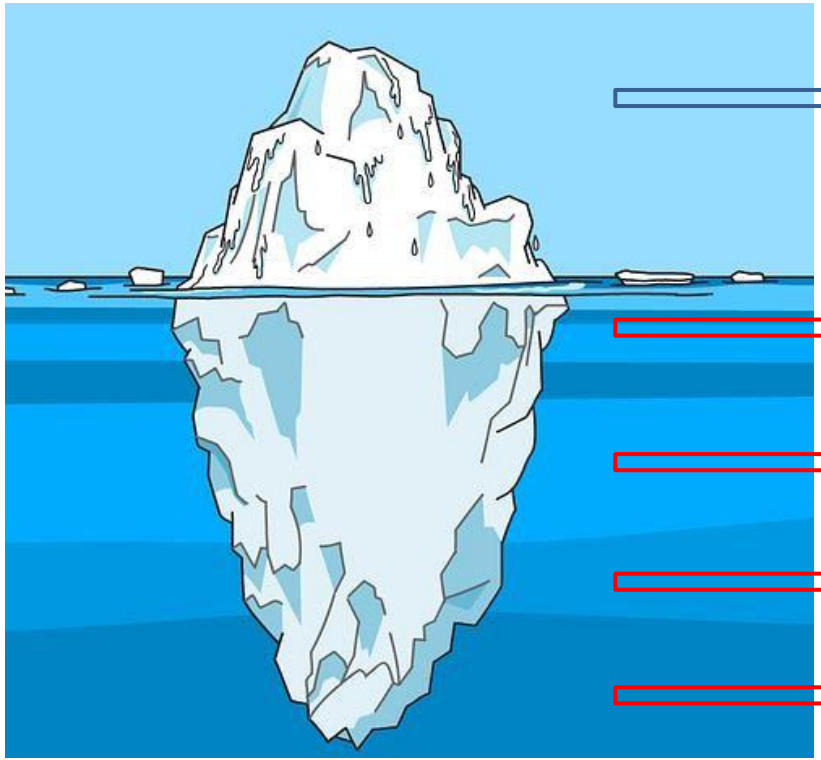
- ✓ Quality and effectiveness of the **work plan**, assessment of risks, and appropriateness of the effort assigned to work… resources
- ✓ Capacity and role of each **participant**, and extent to which the **consortium** as a whole brings together the necessary expertise.

Redactad (y justificad) el ESR del evaluador!

[Evaluation Form RIA/IA]
[Evaluation Form CSA]
[Evaluation Form 1st Stage RIA/IA/CSA]

- *Proposals aspects are assessed to the extent that the proposed work is within the scope of the work programme topic*
- *Evaluation criteria are adapted to each type of action, as specified in the WP*

Diferencias entre buenas propuestas y proyectos financiados



Topic

Destination

Strategic Plan

Key Policies

Cross-cutting issues

Equilibrio

1	Contribución Vs Presupuesto
2	Todos los aspectos del topic
3	Cuantifica tu propuesta
4	Implementación coherente
5	Nº páginas por apartado

Nuria Rodriguez, FEUGA

2. Recomendaciones y lecciones aprendidas

¡Facilítale la vida al evaluador!

Nuria Rodriguez, FEUGA

- Incluir un **resumen** sencillo del proyecto al principio que sitúe al evaluador en la pista de lo que va a encontrar en la memoria (infográfico, conceptos clave, etc.)
- ¡**El formato cuenta**! Usa imágenes, infográficos, tablas resumen, etc.
- Seguir modelo de memoria establecido en el orden y la estructura propuesta: ¡**Que el evaluador encuentre fácilmente la información** que necesita!
- **Estado del arte** claro, "fácil" de entender para no expertos y referenciado (para los expertos)
- **KPIs / Impact indicators** referenciando claramente outputs e impactos del topic / destination y justificando los números propuestos

Check list recomendado por evaluadores

- ¿Responde con precisión al expected outcome del topic?
- ¿Se entiende el European added value y la innovación en una lectura rápida?
- ¿Objetivos y metodología están perfectamente alineados?
- ¿SSH, gender dimension y open science están bien integrados?
- ¿El impacto es una consecuencia lógica de los resultados, sin retórica?
- ¿Los target groups están bien definidos e integrados y se responde a sus intereses?

Check list recomendado por evaluadores

- ¿El work plan, los recursos y los resultados son creíbles y realistas?
- ¿Cada partner tiene un role claro y justificado?
- ¿La propuesta es fácil de navegar y es suficientemente visual para expertos externos?
- ¿Se han eliminado contradicciones y repeticiones?
- ¿Hay aspectos en los que marca una clara diferencia?

Cuéntame un cuento!!

Un Resumen Ejecutivo en forma de *storytelling*

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COVER PAGE

1. **EXCELLENCE**
    1. Objectives and ambition
    2. Methodology
2. **IMPACT**
    1. Project's pathways towards impact
    2. Measures to maximise impact
    3. Summary
3. **IMPLEMENTATION**
    1. Work plan and resources
    2. Participants and consortium

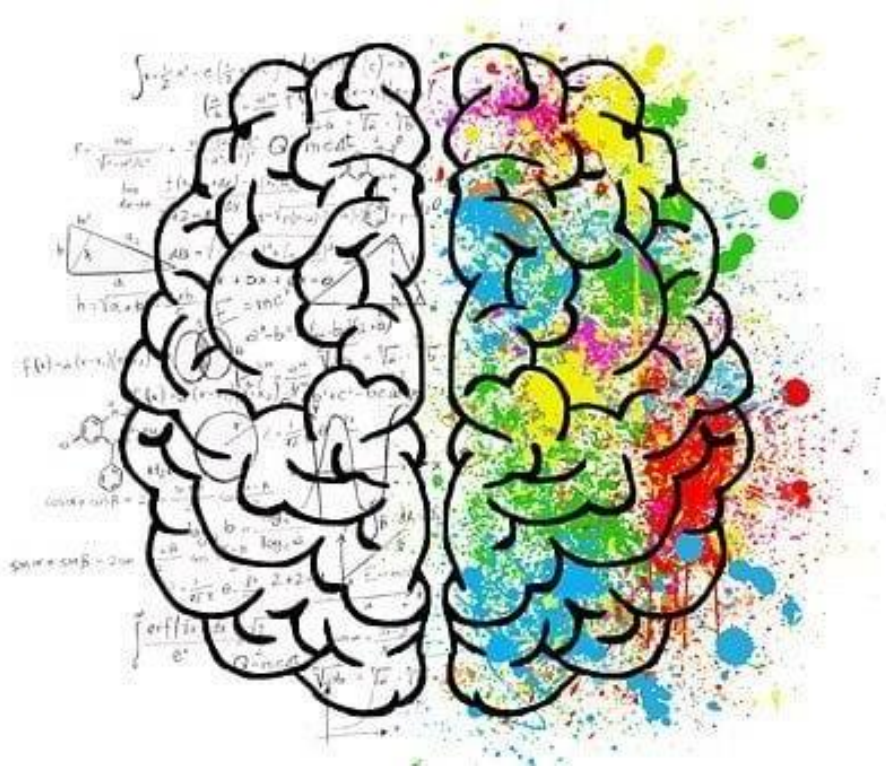
COVER PAGE

1. ***ACRONYM* AT A GLANCE / IN A NUTSHELL**
2. **EXCELLENCE**
    1. Objectives and ambition
    2. Methodology
3. **IMPACT**
    1. Project's pathways towards impact
    2. Measures to maximise impact
    3. Summary
4. **IMPLEMENTATION**
    1. Work plan and resources
    2. Participants and consortium
5. **WHY THIS PROJECT SHOULD BE FUNDED**

La importancia de las 2 primeras páginas

Y de la última!

Cómo funciona la mente de un evaluador?



- Sesgo de Primacía
- Sesgo de Recencia
- Sesgo Numérico
- Sesgo de Coherencia
- …/…

Una tabla inicial que ayude a evaluar

No	Name (short name)	Type of Entity	Role in the project	Country
1			Coordinator & Testbed	Spain
Engagement and acceptance of technology				
2			Acceptance assessment	
3			Social innovation (SSH)	
Technology provider / developer; Pilot Leaders (PL)				
4			Tech. #1 (equipments, machinery) Pilot 1	
5			Tech. #2 (AI-based, Digital twins) Pilot 2	
6			Tech. #3 (Materials developer) Pilot 1	
7			Tech. #3 (GHG monitoring) Pilot 3	
Pilot end users				
8			Pilot #1, Manufacturing + New Materials	
9			Pilot #2 & Pilot #3 Energy Intensive Industries	
Project technolgies multipliers				
10			Sectoral Clusters, Technological Platform	
11			Digital Hub & cascade grant manager	
Key horizontal tasks				
12			Exploitation, Business models development	
12bis			Communication and dissemination	

Un Resumen Ejecutivo en forma de storytelling

- There is a problem/opportunity
- It is big enough
- No one has a satisfying solution so far
- **We** have a promising solution for it
- We cannot do it alone because (barriers)…
- Your support is key / Funding will help in…
- If the solution is developed, the benefits will be…

Un Resumen Ejecutivo en forma de storytelling

S. Consistencia/Coherencia

- There is a problem/opportunity
- It is big enough
- No one has a satisfying solution so far
- **We** have a promising solution for it
- We cannot do it alone because (barriers)…
- Your support is key / Funding will help in…
- If the solution is developed, the benefits will be…

S. Primacía

S. Numérico

S. Recencia

Aportando cifras clave, justificadas en la propuesta

"In God we trust.
All others must bring data."

- Dr. W. Edwards Deming

Sesgo numérico o efecto de anclaje

COVER PAGE

1. *ACRONYM* AT A GLANCE / IN A NUTSHELL
2. EXCELLENCE
   1. Objectives and ambition
   2. Methodology
2. IMPACT
   1. Project's pathways towards impact
   2. Measures to maximise impact
   3. Summary
3. IMPLEMENTATION
   1. Work plan and resources
   2. Participants and consortium
4. WHY THIS PROJECT SHOULD BE FUNDED

Key messages to be brought up during the Panel:

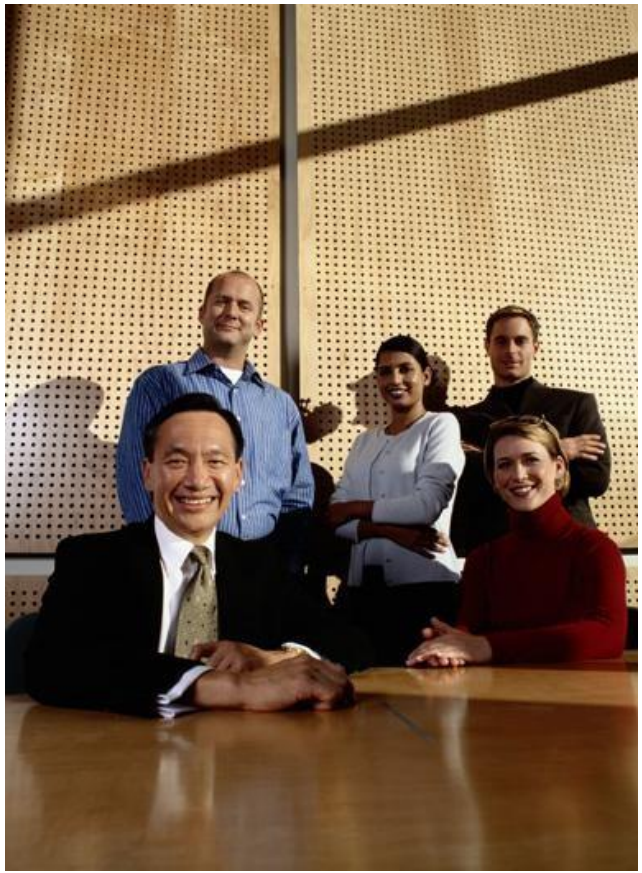
Why ACRONYM?

Why this problem/opportunity?

Why this solution?

Why us NOW?

Y ahora vamos a repasar el criterio de desempate por género



Gender balance como ex-aequo criterion (1/4)

[General Annexes of the WorkProgramme 2026-2027]

Annex F — Procedure Evaluation procedure and ranking

For each group of proposals with the same score, starting with the group achieving the highest score and continuing in descending order:

1) Proposals that address aspects of the call that have not otherwise been covered by more highly ranked proposals will be considered to have the highest priority.

2) The proposals identified under 1), if any, will themselves be prioritised according to the scores they have been awarded for 'Excellence'. When these scores are equal, priority will be based on scores for 'Impact'. In the case of 'Innovation actions', priority will be given to the score for 'Impact', followed by that for 'Excellence'.

3) If necessary, the **gender balance among the researchers with a leading role named in the researchers table in the proposal**, will be used as a factor for prioritisation.

4) If necessary, any further prioritisation will be based on geographical diversity, defined as the number of Member States or Associated Countries represented in the proposal, not otherwise receiving funds from projects higher up the ranking list (and if equal in number, then by budget).

5) If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors related to the objectives of the call, or to Horizon Europe in general. These may include, for example, enhancing the quality of the project portfolio through synergies between projects or, where relevant and feasible, involving SMEs. These factors will be documented in the panel report.

Gender balance como ex-aequo criterion (2/4)

- A **"researcher with a leading role in a project"** refers to an individual responsible for guiding, managing, and directing the action's execution. They normally oversee planning, coordination, resource allocation, and stakeholder communication; set objectives, make key decisions, and ensure alignment with goals and timelines in addition to research activities. They may also formally hold management responsibilities over staff working on the action and in some cases, focus on coordinating contributions from the specific participant or group they represent.

FAQ en el Funding and Tenders Portal

Gender balance como ex-aequo criterion (3/4)

Researchers involved in the proposal

Include only the researchers involved in the proposal, (see below definition of 'researcher'). You do not need to include in the table the identity of other persons involved in the proposal who are not researchers.

'Researchers are professionals engaged in the conception or creation of new knowledge. They conduct research and improve or develop concepts, theories, models, techniques instrumentation, software or operational methods. (Frascati Manual 2015)'

Include also person in charge of the proposal if a researcher.

Title	First Name	Last Name	Gender	Nationality	E-mail	Career stage	Role of researcher (in the project)	Reference identifier	Type of identifier
			[Woman] [Man] [Non-binary]			[Category A – Top grade researcher] [Category B – Senior researcher] [Category C – Recognised researcher] [Category D – First stage researcher]	[Leading] [Team member]		[ORCID] [Researcher Id] [Other - specify]

(example, not to be completed)

[1] Career stages as defined in Frascati 2015 manual:
Category A – Top grade researcher: the single highest grade/post at which research is normally conducted. Example: 'Full professor' or 'Director of research'.
Category B – Senior researcher: Researchers working in positions not as senior as top position but more senior than newly qualified doctoral graduates (IsCED level 8). Examples: 'associate professor' or 'senior researcher' or 'principal investigator'.
Category C – Recognised researcher: the first grade/post into which a newly qualified doctoral graduate would normally be recruited. Examples: 'assistant professor', 'investigator' or 'post-doctoral fellow'.
Category D – First stage researcher: Either doctoral students at the IsCED level 8 who are engaged as researchers, or researchers working in posts that do not normally require a doctorate degree. Examples: 'PhD students' or 'junior researchers' (without a PhD).

Gender balance como ex-aequo criterion (4/4)

Proyecto	Nº hombres con leading role	Nº mujeres con leading role	% hombres con leading role	% mujeres con leading role	Gender ratio (diferencia respecto a 50%-50%)
A	20	21	48,78%	51,22%	1,22%
B	10	11	47,62%	52,38%	2,38%
C	12	17	41,38%	58,62%	8,62%
D	12	18	40,00%	60,00%	10,00%

Ejemplos ficticios

A igual nota en todos los criterios de evaluación, el proyecto que queda más arriba en el ranking es el que tiene un Gender Ratio menor (más próximo a 0%) => proyecto A con un 1,22%.

Conclusiones

- ✓ *Piensa en el evaluador*
- ✓ *Atentos a los cambios relevantes en las plantillas*
- ✓ *Encontrar aspectos de la memoria en los que destacar*

Equipo FECYT / CDTI Apoyo al participante

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Servicios de apoyo al participante

- *Reuniones presenciales y virtuales*
- *En fases tempranas:*
  - *Revisión de ideas de proyectos*
  - *Interpretación y adaptación al topics*
  - *Apoyo en la búsqueda de consorcios*
- *En fases más maduras:*
  - *Revisión de propuestas en fase de escritura*
  - *Consultas de dudas*

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