1. Introduction
2. Policy Aspects
3. Work Programme – Calls – Topics – ToA – Proposal Structure
4. Evaluation Criteria & Process

6 Break-Out Sessions

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<th>TOPIC</th>
<th>ROOM</th>
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<tr>
<td>Health</td>
<td>UF: Félicien Cattier</td>
<td>Frédéric Suche, Lieve Apers</td>
<td>Greet Bilsen</td>
</tr>
<tr>
<td>Food</td>
<td>UF: Emile Francqui</td>
<td>Ann Van Hauwaert, Anja Van Der Haegen</td>
<td>Carine Petit</td>
</tr>
<tr>
<td>Energy</td>
<td>FWO/FNRS: Salon</td>
<td>Sabrina Bijlsma, Ji-Hyeon Kim Vanguers</td>
<td>Nathalie De Vriendt</td>
</tr>
<tr>
<td>Climate</td>
<td>FWO: Hoorne III</td>
<td>Marieke Zwartjes, Pascale Verheyre</td>
<td>Willy Verstraete</td>
</tr>
<tr>
<td>Societies</td>
<td>FWO/FNRS: Salle du Conseil</td>
<td>Natacha Wittorski, Pascale Van Dinter</td>
<td>Virginie Van Ingelgom</td>
</tr>
<tr>
<td>NMBP</td>
<td>FNRS: Room 1E</td>
<td>Pierre Fiasse, Virignia Gomez Oñate</td>
<td>Laurent Adam</td>
</tr>
</tbody>
</table>

Confidentiality: Rules of Proceeding
National Contact Points
Supporting You All Along Your Journey to Horizon 2020

Your Assigned NCPs

http://eurofed.belspo.be  info@belspo.be
http://ncpbrussels.be  info@ncpbrussels.be
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NCP Coordinator

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Pierre Fiasse
NCP Coordinator

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NCP Support in Horizon 2020

EXCELLENT SCIENCE
- ERC
- FET
- MSCA
- Research Infrastr.

INDUSTRIAL LEADERSHIP
- LEIT
  - SPACE
  - NMBP
  - ICT
- Access to Risk Finance Innovation in SME

SOCIAL CHALLENGES
- Health
- Food, Bioeconomy
- Energy
- Transport
- Climate, Envi
- Inclusive societies
- Secure societies

Spreading Excellence, Widening Participation
Science with and for Society
European Institute of Technology
Joint Research
NCP Support in Horizon Europe

Pillar 1
Excellent Science
- European Research Council
- Marie Skłodowska-Curie Actions
- Research Infrastructures

Pillar 2
Global Challenges and European Industrial Competitiveness
- Health
- Culture, Creativity and Inclusive Society
- Civil Security for Society
- Digital, Industry and Space
- Climate, Energy and Mobility
- Food, Bioeconomy, Natural Resources, Agriculture and Environment
- Joint Research Centre

Pillar 3
Innovative Europe
- European Innovation Council
- European Innovation ecosystems
- European Institute of Innovation and Technology

Widening Participation and Strengthening the European Research Area
- Widening participation and spreading excellence
- Reforming and Enhancing the European R&I system
Horizon 2020

Work Programmes, Calls, Topics, Types of Actions
How is Funding Allocated?

Multiannual **Work Programmes** prepared by the EC.

**STRUCTURE**

- Introduction.
- Thematic sections: overall objectives, the respective calls for proposals, topics within each call.
- General Annexes describing general rules such as standard admissibility conditions and eligibility criteria, types of action, selection and award criteria, etc.

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</table>
Search per Key Word e.g. AI

Find Grant Opportunity e.g. for AI in SC5
• Topic Description
• Topic Conditions & Documents
• Partner Search
• Get Support
• Call Information
• Call Updates
Horizon 2020

Proposal Templates & Proposal Self-Evaluation Form
Proposal Templates & Proposal Self-Evaluation Form

H2020 Programme

Proposal template 2018-2020

Administrative forms (Part A) / Project proposal (Part B)

Research and Innovation Actions (RIA) / Innovation Actions (IA)

Single-stage calls & stage 2 of two-stage calls

Version 3.4
1 February 2018

Disclaimer
This document is aimed at informing potential applicants for Horizon 2020 funding. It serves only as an example. The actual Web forms and templates, provided in the online proposal submission system under the Participant Portal, might differ from this example. Proposals must be prepared and submitted via the online proposal submission system under the Participant Portal.

Ref. documents on F&T Portal

Reference Documents
Self Evaluation Forms
Reference Documents

This page includes reference documents of the programmes managed on the EU Funding & Tenders portal starting with legal documents and the Commission work programmes up to model grant agreements and guides for specific actions.

Filter by programme:
Horizon 2020 Framework Programme (H2020)

Filter

- Legislation
- Work Programmes
- Grant agreements, contracts and rules of contest
- Guidance
- Templates & forms
  - Proposal templates
    - 2014-15
    - 2016-17
    - 2018-20
      - Standard proposal template RIA, IA
      - Standard proposal template CSA
      - Standard proposal template RIA/IA Lump Sum - Option 2
      - Standard proposal template CSA Lump Sum - Option 2
Proposal Template

PART A – Administrative Forms

1. General information – Abstract – Declarations – List of participants
2. Administrative data of participating organisations
3. Budget
4. Ethic issues
5. Call specific questions

PART B – Project Proposal

List of Participants

1. Excellence: Objectives – Relation to the Work Programme – Concept and methodology - Ambition
2. Impact: Expected impacts – Measures to maximise the impact (incl/ Dissem.&Exploit., Com)
3. Implementation: Work Plan (WP, D) – Mgt Structures, milestones, procedures – Consortium – Resources to be committed
4. Members of the consortium (incl. Third parties)
5. Ethics and Security
Evaluation Criteria & Process
Evaluation Process

Interpretation of the scores

- Section 1 /5
- Section 2 /5 15 / 15
- Section 3 /5

0

The proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

1

Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

2

Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.

3

Good. The proposal addresses the criterion well, but a number of shortcomings are present.

4

Very Good. The proposal addresses the criterion very well, but a small number of shortcomings are present.

5

Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.
Evaluation Process

Min 3 Experts
- Scientific
- Industry
- Business
- ...

Evaluate numerous proposals
Evaluation Process

Receipt of proposals
- Eligibility check
- Allocation of proposals to evaluators

Individual evaluation
- Individual Evaluation Reports
  (Usually done remotely)

Consensus group
- Consensus Report
  (May be done remotely)

Panel Review
- Panel report
  Evaluation Summary Report
  Panel ranked list

Finalisation
- Final ranked list
Standard Eligibility Criteria

1. Content of proposal corresponds, **wholly or in part**, to the topic description.

2. Proposal complies with **minimum participation rules**.

<table>
<thead>
<tr>
<th>RIA</th>
<th>a. Three legal entities</th>
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<tbody>
<tr>
<td>IA</td>
<td>b. Established in <strong>different</strong> Member States or Associated <strong>Countries</strong></td>
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<tr>
<td></td>
<td>c. Independent of each other</td>
</tr>
<tr>
<td>ERC (EU Research Council)</td>
<td>One legal entity established in Member State or Associated Country</td>
</tr>
<tr>
<td>CSA (Coordination and support)</td>
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</tr>
<tr>
<td>SME Instrument</td>
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</table>
Standard Admissibility Criteria

• On time
• At the right place
• Complete
• Readable, accessible and printable
• Plan dissemination & exploitation
• Part B - page limit (*)
  • RIA/IA: 70
  • CSA: 50
  • First stage: 10

(*) NOT INCLUDING
- Information participating organisations,
- cv’s,
- publications and research of innovation products,
- relevant previous projects/activities,
- relevant infrastructure and equipment,
- third parties,
- ethics self assessment,
- data management plan.
Evaluation Criteria | Relationships

Proposal Part B

1. Excellence
2. Impact
3. Implementation
4. Members of the consortium
5. Ethics and Security

Evaluation form

Excellence

Impact

Quality & Efficiency of the Implementation
Proposal Part B – 1. Excellence

1.1 Objectives

Clear, measurable, realistic and achievable … within project duration.

1.2 Relation to the Work Programme

Explain how your proposal addresses the specific challenge and scope of the work programme topic.

Evaluation form

**Excellence**

*Crt 1.1 – Clarity and pertinence of the objectives*

**OBJECTIVES**

- First section of proposal!
- Reviewers make up their minds VERY quickly
1.3 Concept & Methodology

(a) Concept
• Describe and explain the overall concept + main ideas, models and assumptions involved.
• Technology Readiness Levels.
• Links with other projects/activities.
• Identify any inter-disciplinary considerations and, where relevant, use of stakeholder knowledge.

(b) Methodology
• Describe and explain the overall methodology.

Evaluation form

Excellence

Crt 1.2 – Soundness of the concept, and credibility of the proposed methodology.

CAREFULLY
With TRL ≥ 5 & plan well the activities needed to reach it.
Proposal Part B – 1. Excellence

1.4 Ambition

• Advance beyond the state-of-the-art.
• Extent the proposed work is ambitious.
• Describe the Innovation potential.

Evaluation form

Excellence

Crt 1.3 – Extent that proposed work is **beyond the state of the art**, and demonstrates **innovation potential** e.g.

Don’t duplicate what exists!

• **Ground-breaking objectives, novel concepts and approaches** – RIA.
• **New products, services or business and organisational models** – IA / RIA.
Proposal Part B – 2. Impact

2. 1 Expected impacts

• Each of the expected impacts mentioned under the relevant topic.
• Any substantial impacts not mentioned in the work programme.
• Describe any barriers/obstacles, and any framework conditions.

Evaluation form

Impact

Crt 2.1 – The extent to which the outputs would contribute to the expected impacts listed in the work programme under the relevant topic.

More specific than WP impacts!
Proposal Part B – 2. Impact

2. 1 Expected impacts

• Each of the expected impacts mentioned under the relevant topic.

• Any substantial impacts not mentioned in the work programme.

• Describe any barriers/obstacles, and any framework conditions.

Evaluation form

Impact

Crt 2.2 – Any substantial impacts not mentioned in the WP, that would enhance innovation capacity; create new market opportunities; strengthen competitiveness and growth of companies, address issues related to climate change or the environment, or bring other important benefits for society.
Proposal Part B – 2. Impact

2.2 Measures to maximise impact

(a) Dissemination and exploitation of results
• Draft ‘plan for the dissemination and exploitation of the project’s results’
• Business plan where relevant
• Outline the strategy for knowledge management and protection (incl IPR)
• Open Research Data -> information on how the participants will manage the research data generated and/or collected during the Project

(b) Communication activities
• Promoting the project and its findings

Evaluation form

Impact

Crt 2.3 – Quality of proposed measures to

• exploit and disseminate project results (including IPR, manage research data where relevant)

Business plan for IA!

• communicate the project activities to different target audiences

Reference to a list of communication actions is not enough!
Impact - Exploitation

• **Exploitation Plan**
  
  • At which technological readiness level (TRL) do you start and how will you reach the TRL you aim for as expressed in your proposal’s objectives?
  
  • What are the needed business models and marketing activities and how will they be decided amongst the partners?

• **Common Mistakes in Exploitation**
  
  • Lack of a clear exploitation strategy (especially important for IA!).
  
  • No clear indication of the results that will be exploited (which way, by whom?).
  
  • IPR issues left to the consortium agreement only (access to background, results exploitation).
Impact – Exploitation - IPR

Management of Intellectual Property Rights (IPR): Demonstration of specific measures in scope ownership, access/use, etc. during and after the project.

1. Identify your own background (data, know-how and/or information held or identified by participants prior to their involvement in the project).

2. Verify if background of third parties is needed. If yes, what are their access rights? Need for authorisation to use and exploit the results?

3. Check the state-of-the art: existing patents? E.g. via search in database provided by European Patent Office (Espacenet).

4. Specify the ownership of the results: who owns what? Any transfers? On which conditions?

5. Is there a need to protect the results? If yes, assign cost. Assure appropriate usage rights for key IP during AND after the project (results and background).
Proposal Part B – 3. Implementation

3.1 Work plan – Work packages, deliverables

• overall structure of the work plan
• timing of the different work packages Gantt chart
• detailed work description (WP, deliverables, …)
• Pert chart or similar (inter-relation of the WPs)

Evaluation form

Quality and efficiency of the implementation

Crt 3.1 – Quality and effectiveness of the work plan, including extent to which resources assigned in work packages are in line with the objectives/deliverables

Extensions in time are as a rule not allowed!
Implementation – Workplan & Deliverables

The proposal should be about 1 project

- Workpackages should be logically interlinked
- Workpackages for ‘project management’ and for ‘exploitation & dissemination’ are strongly advised!

Most WP’s need involvement of multiple partners to be credible

If SMEs: integrated in the WP’s (NO separate SME-WP)

Provide deliverables

- Numbered
- Clear
- Spread over the course of the project: need for EARLY deliverables!
- Rough guide: 1 deliverable/person year
Implementation – Workplan & Deliverables

For each Work Package in the proposal

- List participants
  - Their expected involvement in person months

- Objectives (best is one objective/WP)

- Description of the work
  - Tasks needed to achieve objective(s) and justifying the person months

- Deliverables (refer to number)
Proposal Part B – 3. Implementation

3.2 Management structure, milestones and procedures

• Organisational structure and the decision-making mechanisms + why they are appropriate to the complexity and scale of the project
• where relevant, Innovation management
• Describe any critical risks, relating to project implementation + mitigation measures

Evaluation form

Quality and efficiency of the implementation

Crt 3.2 – Appropriateness of management structures and procedures, including risk and innovation management
Implementation – Management

How are you going to handle problems?

Every WP should have a WP-leader: together = MNGMNT Committee
- Innovation Management! (if not integrated in mngmnet committee)
- Yearly meetings + at milestones

Consortium agreement has a management part, describe how to decide on:
- Changing participants
- Updating plan
- Re-allocating budgets
- Approving reports and deliverables
- ...

Describe risks related to project implementation
Proposal Part B – 3. Implementation

3.3 Consortium as a whole

- Describe the consortium
- Describe the contribution of each partner
- If a participant requesting EU funding is based in a country or is an international organisation that is not automatically eligible for funding, explain why the participation of the entity in question is essential to carrying out the project

3.4 Resources to be committed

- table showing number of person/months required
- table showing ‘other direct costs’ for participants where those costs exceed 15% of the personnel costs

Evaluation form

Quality and efficiency of the implementation

Crt 3.3 – Complementarity of the participants and expertise which the consortium as a whole brings together

Crt 3.4 – Appropriateness of allocation of tasks, ensuring that all participants have a valid role and adequate resources in the project to fulfil that role
Proposal Part B – 4. Members of the Consortium

4.1 Participants (applicants)
- a description of the legal entity and its main tasks
- a curriculum vitae + profile of the persons
- a list of up to 5 relevant publications, and/or products, services
- a list of up to 5 relevant previous projects or activities
- a description of any significant infrastructure and/or any major items of technical equipment

4.2 Third parties involved in the project (including use of third party resources)
- Does the participant plan to subcontract certain tasks
- Does the participant envisage that part of its work is performed by linked third parties
- Does the participant envisage the use of contributions in kind provided by third parties

Evaluation form
Quality and efficiency of the implementation

The information provided here will be used to judge the operational capacity
Implementation – Consortium

Describe the consortium as a whole

Describe the role of each partner

- Tasks in the project
- For each of these tasks: relevant expertise

Explain well the reason for subcontractors, especially if the related costs are high, and be careful with predefined subcontractors

Check each partner’s planned effort (make a table with planned effort in mandays per WP versus Partner)

- Each WP ONE leader?
- No unneeded partners (sign = effort in each WP same)?
- No specific WPs for specific partners like SMEs?
<table>
<thead>
<tr>
<th>NCPs</th>
<th>Target Stakeholders</th>
<th>NCP Coordinators</th>
</tr>
</thead>
<tbody>
<tr>
<td>EUROFED <a href="http://eurofed.belspo.be">http://eurofed.belspo.be</a></td>
<td>Federal Research Organisations</td>
<td>VAN DINTER Pascale <a href="mailto:pascale.vandinter@belspo.be">pascale.vandinter@belspo.be</a></td>
</tr>
<tr>
<td>NCP Brussels <a href="http://ncpbrussels.be">http://ncpbrussels.be</a></td>
<td>Organisations &amp; Private Companies in Brussels Capital Region</td>
<td>KIM VANGUERS Ji-Hyeon <a href="mailto:jhkim@hub.brussels">jhkim@hub.brussels</a></td>
</tr>
<tr>
<td>NCP Wallonie <a href="http://www.ncpwallonie.be">http://www.ncpwallonie.be</a></td>
<td>All Stakeholders Based in Walloon Region – Specific Focus on Companies</td>
<td>FIASSE Pierre <a href="mailto:pierre.fiasse@ncpwallonie.be">pierre.fiasse@ncpwallonie.be</a></td>
</tr>
<tr>
<td>NCP FNRS <a href="http://www.ncp.fnrs.be">http://www.ncp.fnrs.be</a></td>
<td>Universities, University Hospitals &amp; <em>Hautes Ecoles</em> in Fédération Wallonie-Bruxelles</td>
<td>WITTORSKI Natacha <a href="mailto:natacha.wittorski@frs-fnrs.be">natacha.wittorski@frs-fnrs.be</a></td>
</tr>
<tr>
<td>NCP FLANDERS <a href="https://www.ncpflanders.be">https://www.ncpflanders.be</a></td>
<td>All Stakeholders Based in Flanders</td>
<td>VAN HAUWAERT Ann <a href="mailto:ann.vanhauwaert@fwo.be">ann.vanhauwaert@fwo.be</a></td>
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</table>