



#HorizonEU

THE EU RESEARCH & INNOVATION PROGRAMME

2021 – 2027

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DIRECTORATE-GENERAL FOR RESEARCH & INNOVATION
H3 – COMMON SERVICE FOR BUSINESS PROCESSES

How to become an evaluator for Horizon Europe

Types of experts





The role of independent experts

Expert tasks:

- assessing applications for EU funding (including prizes and tenders) → **Evaluators**
- monitoring of EU funded projects and contracts → **Monitors**
- opinions and advice on specific issues → **Other experts**

Call for expression of interest





Call for expression of interest for experts

Experts respond to a [Call for expressions of interest for experts](#).

European Commission | EU Funding & Tenders Portal

Home > Work as an expert

Work as an expert

We need experts for:

- Assessing applications for EU funding (including prizes and tenders),
- Monitoring of EU funded projects and contracts,
- Giving your advice on specific issues.

Experts act in their individual capacity to assist the EU services with the implementation of EU funding & tenders managed through the Portal.

Do you have an extensive professional experience & proven domain-knowledge?

[Register as expert](#)

As new expert, you will be first requested to create your EU login account and register your profile.

Registered experts can update the profile via the 'My Expert Area' once [signed in](#).

Find out more about the evaluation and monitoring objectives and scope in the [terms of reference](#).

If you need further guidance, access the [key steps for experts](#).

Calls for expressions of interest for experts

- [Call for expressions of interest for experts \(2021-2027\)](#)
- [Calls for expressions of interest for experts \(2014-2020\)](#)

Working materials

- [Standard briefing slides for HE evaluators](#)
- [Information for HE monitors](#)
- [Briefing videos for HE experts](#)
- [How to evaluate ethics in Horizon Europe proposals](#)

Useful links

- [Helpdesk and Support Services](#)
- [FAQ for Experts](#)
- [Experts dashboard](#)
- [List of contracted experts](#)

Contracts & remuneration

- [Model contract for evaluators](#)
- [Model contract for monitors](#)
- [Methodology for expert fees](#)
- [Increase in expert allowances](#)
- [Reimbursement of Eurostar tickets](#)

You can register in the EU experts database at any time.

Click [here](#) to register!



Call for expression of interest for experts

Experts can register in the EU experts database at any time

The minimum requirements for the creation of a profile are the following:

Data required by EU to be selected and contracted	Requirement
First & Last name (EU login)	Mandatory
Gender	Mandatory
Date and country of birth	Mandatory
Nationality	Mandatory
E-mail (EU login)	Mandatory
Phone number	Mandatory
Keywords	3
Employment	1 (current)
Language	1
Place of residence	Mandatory
Education	1 (highest qualification attained)

List all relevant keywords that best describe your expertise in the 'Area of expertise' section

If selected, you will be contracted and conduct most of your work remotely

Selection of experts and rotation rules





Experts selection criteria

All experts are selected according to the following criteria:

- **high level of skills, experience and knowledge** appropriate to carry out the tasks assigned to them, e.g. for evaluators in the areas of the call (including project management, innovation, exploitation, dissemination and communication)
- **absence of conflict of interest** in relation to a matter on which the expert is required to provide an opinion

If these conditions are satisfied, experts are selected to achieve:

- a balanced composition in terms of various skills, experience, and knowledge, geographical diversity and gender
 - According to the EU equal opportunities policy and Gender equality strategy 2020-2025, this implies achieving a target of **50% gender parity** for all Horizon Europe bodies and **evaluation committees.**
- a private-public sector balance, if appropriate



Rotation rules

Regular rotation of experts is ensured in order to incentivise the participation of new experts, to raise their knowledge on the programme, to encourage participation of experts from all Member States in particular from widening countries:

- **Reimbursement thresholds**
 - experts can normally not be paid more than **EUR 90.000 during a period of four consecutive calendar years** by any Commission service/Agency for any funding Programme, excluding allowances and travel costs
 - **individual contracts** must stay below the thresholds for the award of public contracts referred to in Article 175 of the EU Financial Regulation 2018/1046 (currently **EUR 140.000**, excluding allowances and travel costs)
- at least **25% newcomer experts** are appointed each year (i.e. experts that for a specific call in Horizon Europe have not been contracted as evaluators for Horizon Europe in the past three years)
- a number of **‘brand new’ experts** (i.e. experts never contracted during the previous years for the R&I Framework Programmes) are included

Horizon Europe evaluation procedure





Evaluation (award) criteria

- A proposal is evaluated on the basis of award or evaluation criteria
- Standard evaluation criteria for each type of action are announced in the General Annexes of the HE Work Programme
 - Excellence
 - Impact
 - Quality and efficiency of the implementation
- Changes to the standard evaluation criteria must be clearly announced in the topic description

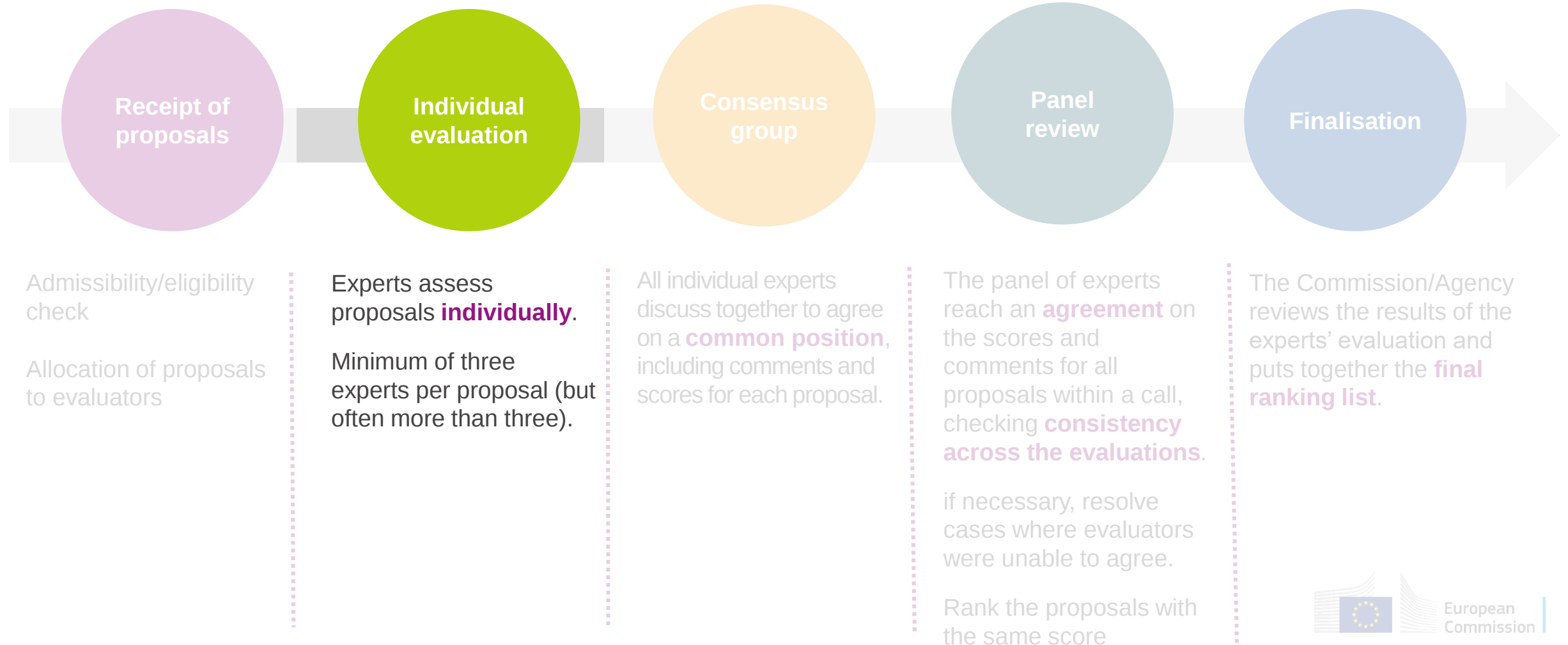


Standard evaluation process





Standard evaluation process



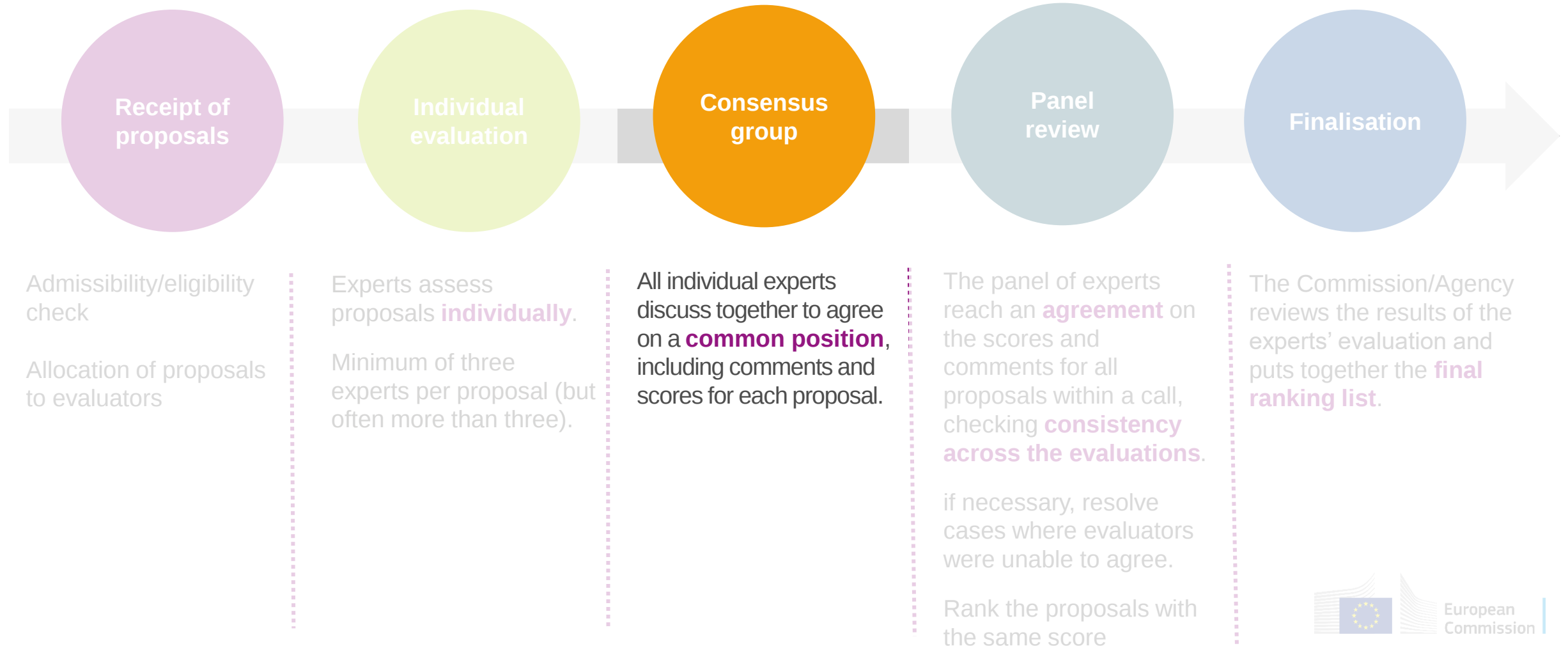


Individual evaluation

- Read the proposal and evaluate it against the evaluation criteria, without discussing it with anybody else and as submitted and not on its potential if certain changes were to be made.
- Complete an Individual Evaluation Report (IER).
 - Evaluate each proposal as submitted and not on its potential if certain changes were to be made.
 - If you identify shortcomings (other than minor ones and obvious clerical errors), reflect those in a lower score for the relevant criterion. Proposals with significant weaknesses that prevent the project from achieving its objectives or with resources being seriously over-estimated must not receive above-threshold scores.
 - Provide comments and scores for all evaluation criteria (scores must match comments).
 - Explain shortcomings, but do not make recommendations (e.g. no additional partners, work packages, resource cuts).
 - Sign and submit the form in the electronic system.



Standard evaluation process



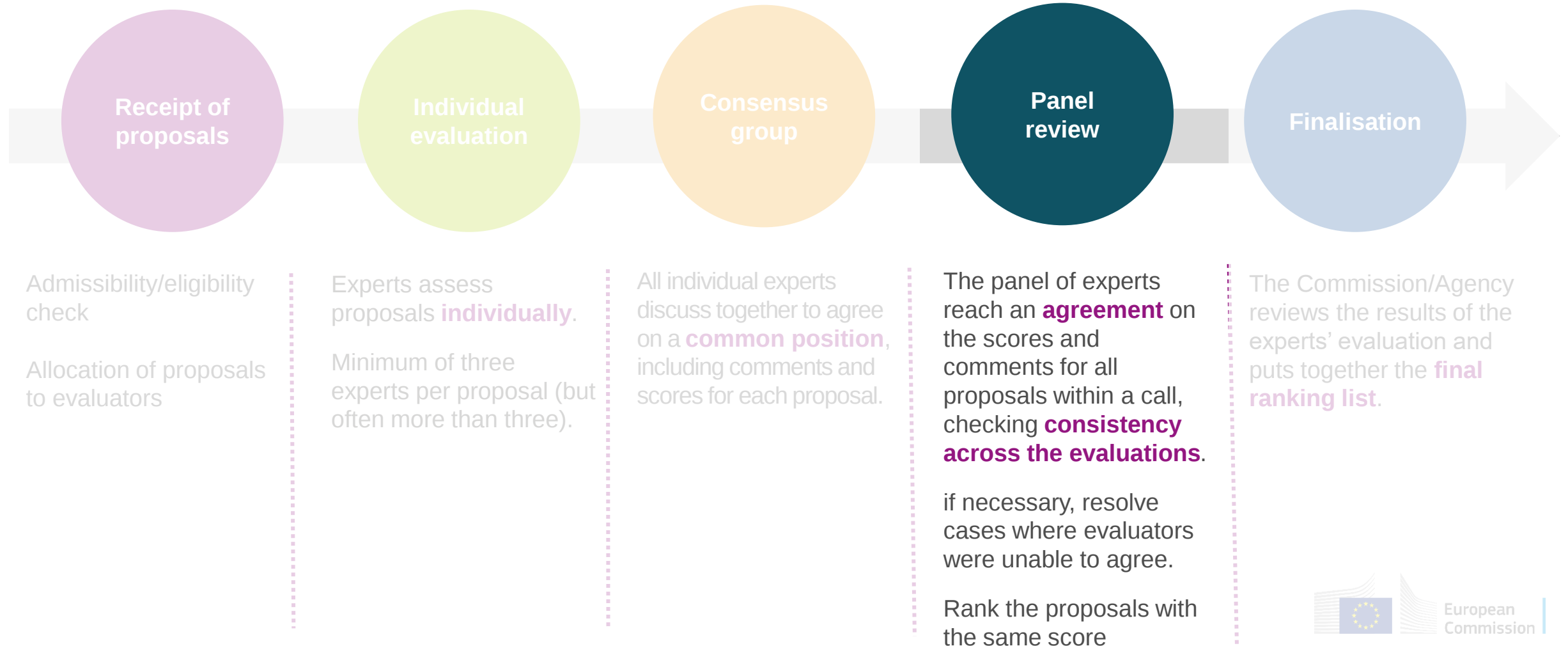


Consensus

- It usually **involves a discussion on the basis of the individual evaluations.**
- The aim is to **find agreement on comments and scores.** Agree comments before scores!
- **‘Outlying’ opinions need to be explored.**
 - They might be as valid as others. Be open-minded.
 - It is normal for individual views to change.
- **Moderated by EU staff (or an expert in some cases).**
 - Neutral and manages the evaluation, protects confidentiality and ensures fairness.
 - Ensures objectivity and accuracy, all voices heard and points discussed.
 - Helps the group keep to time and reach consensus.
- **The rapporteur is responsible for drafting the consensus report (CR).** The rapporteur includes consensus comments and scores and in some cases does not take part in the discussion.



Standard evaluation process





The panel review

- Consists of experts from the consensus groups and/or new experts
- Ensures the consistency of comments and scores given at the consensus stage
- Resolves any cases where a minority view is recorded in the consensus phase
- Endorses the final scores and comments for each proposal
- Recommends a list of proposals in priority order
- Prioritises proposals with identical total scores
- May also hold hearings at which applicants are invited to present their proposal
- **The discussion is led by the panel chair (normally EU staff, but also an expert in some cases).**
 - The chair must ensure fair and equal treatment of the proposals and seek agreement on a common view.

Horizon Europe monitors





Role of monitors in project implementation

Monitors play a crucial role in tracking and evaluating project implementation.

Their responsibilities might include:

- **conducting project reviews and attending progress meetings**
- **preparing mid-term and final reports**
- **overseeing projects over a specified duration**, such as business innovation initiatives



Role of project reviewers

Project reviewers focus on:

- Assessing the completion of deliverables.
- Evaluating the ongoing relevance of project objectives
- Analysing resource planning and usage.
- Ensuring adherence to principles of economy, efficiency, and effectiveness.
- Reviewing management procedures and methods used.
- Assessing integration and contributions of beneficiaries within the project.
- Evaluating potential project impact.
- Reviewing plans for result utilisation and dissemination.



HE other types of experts





Other types of experts

Other types of experts (such as ethics experts, gender experts, financial experts, policy experts, etc) assist with more in-depth expertise in specific areas.

- **Policy experts**

- Assist in **expert groups** supporting the Commission with the implementation, evaluation or design EU funding programmes.
- Analyse current situations, rationales, and objectives.
- Formulate recommendations for better implementing existing/new programmes.

Additional important information



For more information:

[Work as an expert](#)

[Call for Expression of Interest for experts \(2021-2027\)](#)

[IT how to](#)

[Standard briefing slides for experts \(HE\)](#)

[Briefing videos on how to evaluate HE proposals for experts](#)



Research Enquiry Service

For questions about EU research funding programmes,
you can contact the Research Enquiry Service via the webform:

[Research Enquiry Service \(europa.eu\)](https://ec.europa.eu/research-enquiry-service/)





Thank you!

HorizonEU

<http://ec.europa.eu/horizon-europe>



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