

# IHI JU INDEPENDENT OBSERVER'S REPORT

Call ID: HORIZON-JU-IHI-  
2025-10-two-stage (2nd stage)

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Present at the evaluation: 13 November 2025

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# 1 Introduction and approach taken by the observer

My role for this report was to independently observe the evaluation process of the IHI Joint Undertaking (JU) Stage 2 evaluation of HORIZON-JU-IHI-2025-10-two stage, stage 2 (hereafter Call 10). This call consisted of three Research Innovation Action (RIA) topics, each following the standard two-stage evaluation. As only the highest ranked proposal, per topic, from Stage 1 is invited to submit a full proposal for Stage 2 (deadline on 14 October 2025), this resulted in one proposal per topic.

The topics evaluated were:

- HORIZON-JU-IHI-2025-10-01: Digital label: one source of comprehensive information for medical technology products
- HORIZON-JU-IHI-2025-10-02: Enabling and safeguarding innovation in secondary use of health data in the European Health Data Space (EHDS)
- HORIZON-JU-IHI-2025-10-03: Per- and Poly-fluoroalkyl substance (PFAS) exposure, emissions, and end of life management in the healthcare sector

Each proposal was evaluated by panel ranging from 4 to 6 experts' evaluators and all consensus meetings took place remotely on the same day, scheduled on 13 November 2025 using WebEx tool. As sessions ran in parallel, I rotated between the three panels approximately every two hours, ensuring complete coverage of discussions under all evaluation criteria (i.e. excellence, impact and quality and efficiency of the implementation).

To prepare for my task, I reviewed the following documentation, all of which are listed on the IHI website<sup>1</sup>:

- All Call 10 documentation including the topic texts, expected outcomes, expected impacts and call conditions<sup>2</sup>
- The IHI Guide for Applicants
- The IHI Guide for Contributing Partners
- Frequently Asked Questions
- Guidelines on In-kind Contributions to Additional Activities (IKAA)
- Guidance for regulatory considerations in IMI and IHI projects
- The IHI evaluation form and scoring guidelines
- Checklist for assessing IHI JU eligibility for funding of companies
- Associated partners 'case b' – guidance for IHI project coordinators
- The standard Independent Observer report template

I also attended the Independent Observer briefing delivered by the call coordinator Alessandro Chiodini on 24 October 2025.

During the consensus phase I followed the moderation of all three topics, reviewed randomly selected IERs, CRs and ESRs, checked the SEP platform during the entire evaluation process to check the progress and engaged with moderators and staff for clarification when needed. My presence was acknowledged to the experts at the start of consensus phase by IHI's executive directive Dr. Niklas

<sup>1</sup> <https://www.ih.europa.eu/apply-funding/call-documents>

<sup>2</sup> [https://www.ih.europa.eu/sites/default/files/uploads/Documents/Calls/IHI\\_Call10\\_CallText.pdf](https://www.ih.europa.eu/sites/default/files/uploads/Documents/Calls/IHI_Call10_CallText.pdf)

Blomberg and again during each panel meeting. Experts were duly informed that they could contact me directly should they wish to share comments and feedback.

## 2 Overall impression

- **Scale of complexity of the evaluation task:** With only one proposal per topic, the workload was reduced compared to other type of calls. The complexity mainly arose from the diversity of the topics. Topics included digital device labelling, governance and the secondary use of health data, and PFAS emissions and mitigation. This required panels with broad and complementary expertise, which was reflected in the expert selection process. Voluntary feedback from experts and rapporteur at the end of the evaluation process, as well as during email exchanges, reported that the IERs, CRs and the consensus phase were very well manageable within the available time. The Stage 2 structure also enabled a more thorough evaluation of the completeness, feasibility and credibility of the full proposals.
- **Transparency of the procedures:** The procedures were clear and well communicated. All experts and I had access to the same public documentation from the Funding and Tenders (FT) Portal, the IHI website and email communication from the IHI staff. Internal briefings were timely and comprehensive where experts and rapporteur were reminded of transparency obligations, confidentiality, conflict of interest procedures and the need to assess proposals strictly as submitted. I observed no concerns regarding transparency from any expert or staff member during the entire evaluation.
- **Throughput time of the process and the efficiency of the procedures:** The overall evaluation period, including the individual remote evaluation and the consensus meetings, was adequate. The consensus meetings stayed very close to the agenda. Moderators managed the process efficiently and the quality control by IHI staff was conducted with sufficient time. Suggested changes to the CRs were minimal and usually related to wording clarity. The approach of having one proposal per topic reduced time pressure and allowed experts to discuss all sub-criteria and respective score thoroughly.
- **Efficiency, reliability and usability of the implementation of the procedures, including the IT-tools:** Experts found the SEP system intuitive and it functioned very well without any issues. All submissions and approvals were performed smoothly. WebEx tool also worked reliably throughout the consensus meeting phase. There were a couple of minor connection delays on the expert's side, but these had no impact on the evaluation. Overall, the IT setup was efficient and fit for purpose.
- **Impartiality, fairness and confidentiality:** All experts signed their declarations of absence of conflict of interest. There were no COI cases before or during the evaluation day. Moderators ensured a fair and respectful atmosphere. Experts contributed equally and each viewpoint was heard. Moderators repeatedly checked that the discussion aligned with the scoring guidance and criteria. Confidentiality was observed throughout the process.
- **Conformity of the evaluation process witnessed with the evaluation procedures published in the HE Grants Manual:** The evaluation followed the Grants Manual strictly. The moderators ensured adherence to the three criteria and their sub-criteria. No deviations from Horizon Europe rules or IHI specific procedures were observed. When clarification was needed, moderators referred precisely to the text of the criteria, preventing inconsistent interpretation.
- **Quality of the EU evaluation process in comparison with the evaluation procedures of national and/or other international research funding schemes:** The IHI evaluation process remains one of the most robust and consistent I have encountered. The clarity of the structure, the organisation of the consensus meetings and the quality of moderation were all strong. Compared to national schemes in Germany and Ireland, the EU process remains more systematic, more disciplined with respect to criteria guidance and stronger in ensuring consistency across panels.

- **Quality of the evaluation process overall:** The evaluation was conducted to a high professional standard. Although each panel only had one proposal, it was evaluated as thoroughly as if there had been multiple proposals. The discussions were facilitated by competent and impartial moderators. Experts demonstrated professionalism, preparedness and openness to discussion. The collegial tone made it possible to reach consensus smoothly. No noteworthy issues occurred during the day, and I am confident that the process met all expectations of fairness, transparency and rigour.

### 3 Any other remarks

The overall organisation of the entire evaluation process including the remote evaluation phase and the consensus meetings was smooth, without any technical disruptions and allowed a clear flow of information. The experts appreciated the structured start to each session, which created a common understanding of expectations. Several experts commented informally that the moderation style was supportive and calm, helping them focus on the criteria rather than procedural detail. I also noted that the quality control feedback from IHI staff contributed to improving the clarity and consistency of expressions used in the consensus reports. The availability of the backup moderator was reassuring.

As the topics differed widely in nature, the experts welcomed the opportunity to ask clarifying questions before entering detailed discussion. This was especially relevant for digital health topics where regulatory and technical elements can be interpreted differently. The experts made positive remarks about the clarity of the documentation provided to them, particularly the topic texts and score interpretation guidance. I observed that experts relied on these documents extensively during discussion. In one panel an expert mentioned that the complementarity of expertise was particularly useful. The importance of providing high quality Evaluation Summary Reports (ESR) was stressed to all experts because these documents represent the only feedback applicants receive after considerable work. My review of selected reports confirmed that they offered fair, clear and useful feedback.

The expert panel was very well balanced in terms of gender (approximately 50% female and 50% male), sector type, geographical reach, expertise and experience.

### 4 Summary of Recommendations

Based on my observations I make the following recommendations:

- There is heavy usage of abbreviations, e.g. CR, IER and ESR. While this makes the process efficient, one of the first-time experts found the heavy usage confusing, especially as the term 'CR' can refer to both 'Criteria' and 'Consensus Report'. I suggest adding a list of abbreviations to the briefing documents.
- Although the expert panel was very well balanced in terms of gender, sector type, geographical reach, expertise and experience, the representation of members from widening countries could be further improved.

I extend my sincere thanks and gratitude to all the staff from IHI involved in this evaluation, their support and facilitation were invaluable, enabling me to fulfil my role without any hindrance.