

IHI JU responses to the Independent Observer's report

Call ID: HORIZON-JU-IHI-2025-09-single stage

IHI JU 9th Call for Proposals – single stage

Dates of evaluation: 10 to 20 June 2025

Name of the Independent Observer: Ian Macdonald HAYES

Summary of Recommendations

After observing the complete evaluation process and gathering feedback from evaluators, the observer has identified several recommendations for consideration by IHI in future evaluations.

Recommendations specific to 'remote' meetings:

- 1) While variations in moderation styles were within acceptable limits during the present evaluation, the observer noted that some of the most effective discussions were accompanied by the moderator providing frequent visual reference to resources such as the interpretation of the scores and practical guidance to describe strengths or negative points in the proposals and use of appropriate qualifiers. For remote meetings, it is recommended to 'over message' and to reinforce with the use of regular visual screen-share prompts.
- 2) Some evaluators expressed difficulties in aligning the overview agenda with start times for some meetings, as well as occasional challenges in reaching evaluators, at the time when they were needed. It is natural that some review meetings will take longer than others, and it is recommended to consistently use the Chat function and a screenshare on the main Webex meeting screen to keep the evaluators regularly updated on timeframes.

Recommendations specific to the 'the award criteria and scoring scheme':

- 3) While the observer is fully confident that the moderators promptly and effectively resolved areas of confusion / misunderstanding during the respective consensus discussions, there was some confusion noted (and reflected in evaluator feedback) relating to the description, meaning and use of certain scoring terms (notably 'weaknesses'), and in the use of certain qualifying words (notably 'adequate'), as highlighted in this report. The observer's experience from other Horizon Europe calls, such as MSCA, would reinforce that these challenges are not unique to IHI and point to the solutions (such as Guidance Notes and the use of Video Training) that have been developed by others. Noting that there is always room for improvement in the guidance and clarification on terminology and best practice, the observer recommends to further consider the Evaluation Template and Briefing notes in this regard.
- 4) In relation to the Horizon Europe requirement to evaluate the 'technical robustness' of AI, it is recommended that the IHI update and further clarify the requirements of this sub-criteria question in the Evaluation Template. Additionally, because this is not an IHI-specific issue, additional clarification should come from Horizon Europe and ideally be aligned across its different call areas.

Recommendations specific to the ‘the growing use of AI / LMM for proposal writing’:

- 5) Several evaluators highlighted concerns with the increased (potential) use of AI / large multimodal model (LMM) contribution to proposal writing by applicants (as well as the potential use of AI by evaluators). Given that this is only likely to increase in frequency, it is recommended that Horizon Europe develop policy to address this since it is not an IHI-specific issue.

Recommendations specific to the use of SEP and email exchange:

- 6) In relation to the email exchange of tracked changes, it is recommended that the IHI email all evaluators following the evaluation to explicitly remind them of their on-going confidentiality obligations and additionally to delete all confidential material relating to the evaluation.

IHI JU responses to the recommendations

IHI JU welcomes the Independent Observer conclusions, which confirm that the overall quality of the evaluation was high. Furthermore, IHI office will take into consideration the recommendations made, whenever possible:

Recommendations specific to ‘remote’ meetings:

- 1) The IHI JU reminds that, as part of the evaluation process, evaluators are required to attend a web-briefing session dedicated to the call and read the relevant documentation pertaining to the evaluation process. The above contains extensive information and practical guidance, including the interpretation of scores, the difference between strengths and weaknesses and the use of appropriate qualifiers. The IHI JU will recommend that panel moderators reinforce the communication of this information through regular visual messages shared during the evaluation.
- 2) During the web-briefing sessions, panel moderators are already stressing the importance of timing. The IHI JU welcomes the Independent Observer’s recommendation and will ensure the systematic use of the chat function and screen sharing on the main Webex meeting screen to keep the evaluators regularly informed on timeframes.

Recommendations specific to the ‘the award criteria and scoring scheme’:

- 3) Evaluators are provided with guidance on the award criteria and scoring system (i.e. Annotated Evaluation Form) which contains detailed descriptions of all scoring and qualifying terms, categorised by evaluation criterion. The IHI JU is happy to take the opportunity to review the current guidance and update as needed particularly with regards to definitions and use of qualifying terms. The IHI JU will continue to emphasize the importance of terminology during the briefing sessions and will remind experts of the existence of documents intended to clarify scoring and qualifying terms.
- 4) The IHI JU recalls that the evaluation templates in the EU Funding and Tenders Opportunities portal are established at the Horizon Europe programme level. The IHI JU will coordinate with the relevant European Commission services for receiving further guidance and instructions for assessing the ‘technical robustness’ of Artificial Intelligence (AI) and will inform the relevant European Commission service of the need to clarify the requirements of this sub-criterion question in the Evaluation Template. In addition, if AI is addressed in the topic text, the IHI JU ensures that an expert(s) with the relevant expertise is part of the panel composition.

Recommendations specific to the ‘the growing use of AI / LMM for proposal writing’:

- 5) We fully acknowledge the concerns regarding the increased use of AI / Large Multimodal Model (LMM) by applicants and evaluators. The IHI JU will closely follow policy developments regarding AI at Horizon Europe programme level and will coordinate with the relevant EC services for receiving further guidance and instructions. The IHI JU has already reinforced its messaging to evaluators highlighting once again the confidentiality of their work and the necessity to avoid the use of AI/LMM in their work.

Recommendations specific to the use of SEP and email exchange:

- 6) During the web-briefing sessions, the IHI JU emphasizes confidentiality obligations and constantly reminds experts that confidentiality is a contractual obligation. The IHI JU will pay special attention to further reinforce and remind experts of their obligation during and after the evaluation process.