

IHI JU INDEPENDENT OBSERVER'S REPORT

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

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Present at the evaluation: From 10 to 20 June 2025

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1 Introduction and approach taken by the observer

This report describes the Independent Observer's (IO) observations, assessment and advice on the practical workings of the evaluation process, for the HORIZON-JU-IHI-2025-09-single-stage call, on the conduct and fairness of the evaluation sessions, on the application of the award criteria and on the procedures and their implementation, including IT tools, and opportunities for improvement of the evaluation process.

In execution of his task the observer took the following approach:

The observer received and reviewed information ahead of the central meetings, including previous Independent Observer's reports from Call 5 and Call 7 (single Stage), a list of Evaluators, the Call 9 Call Document, and the IHI 2025 Work Programme, had a briefing with the Call Coordinator, and was given access to the SEP evaluation platform.

The consensus and panel meetings for the five Topics, including briefing by the IHI Executive Director, Evaluators' briefing and introductions, discussion of proposals, scoring, drafting and quality control of Consensus Reports (CR), Cross-reading and Panel Ranking, were held fully remotely via WebEx (with Links provided to the observer), as follows:

Topic	Topic Title
Topic 1	Boosting innovation for a better understanding of the determinants of health
Topic 2	Boosting innovation through better integration of fragmented health R&I efforts
Topic 3	Boosting innovation for people centred integrated healthcare solutions
Topic 4	Boosting innovation through exploitation of digitalisation and data exchange in healthcare
Topic 5	Boosting innovation for better assessment of the added value of innovative integrated healthcare solutions

During the consensus meetings that took place fully remotely by Webex, the observer attended all days of the evaluations, including the panel briefing and proposal review meetings. As meetings for topics 1 and 2, and for topics 3, 4 and 5 ran in parallel, the observer rotated between the meetings with the aim of observing as much of the process across the Topics as possible. By the end of the evaluation phase, the observer was able to fully attend three (3) panel briefings, seventeen (17) proposal consensus reviews, seven (7) proposal QC checks, sixteen (16) proposal cross-readings and three (3) panel rankings to evaluate their quality and compliance with the standard format.

All expert evaluators (referred to in this report as 'evaluators') received the email address of the Independent Observer (IO) and were encouraged to provide comments/feedback both during and after the evaluation process. Additionally, the email address of the IO was regularly posted in the WebEx Chat by the moderator. At the time of writing this report, the observer had received email feedback from nine (9) evaluators. On several occasions the observer was given the opportunity to introduce themselves, with a reciprocal 'Tour de Table' introduction from the evaluators, and at the conclusion of consensus discussions the observer was also facilitated to gather round-table feedback from the remaining evaluators.

The observer had an opportunity to gather input and feedback from the various Scientific Officers (SO) following the evaluation period.

2 Overall impression

- **Scale of complexity of the evaluation task:**

A total of thirty-nine (39) eligible proposals, across five (5) topics, were evaluated by sixty (62) evaluators (83 contracted). Originally, fifty (50) proposals were submitted, of which four (4) were declared ineligible and seven (7) inadmissible.

Topic	Eligible proposals (total submitted)
1	6 (8)
2	16 (18)
3	7 (11)
4	7 (8)
5	3 (5)
Total	39 (50)

Overall, the observer found the evaluation workload to be well balanced, albeit in the upper range of complexity compared to standard Horizon Europe RIA proposals. The present call had some specific requirements and a few extra annexes that demanded extra attention from the evaluators, including:

- In-kind contribution and types of participants, necessitating careful examination not only the financial contributions but also the nature and value of the in-kind contributions provided by the members of the industry associations.
- Annex to the Budget table, requiring meticulous scrutiny, especially ensuring that at least 45% of the sum of total project eligible costs plus costs of any related In-kind contributions to additional activities is provided by IHI JU private members and IHI JU Contributing Partners, their constituent entities and affiliated entities.
- Increased page limit of 50 pages, compared to the standard 45 pages for Horizon Europe RIA proposals, which meant that there was more content to review.

Specifically, Call 9 was described as a Pilot, with the scope of each of the topics being especially broad, in order to encourage applicant-led approaches, structured around strategic objectives and driving innovation. Call 9 looks for ambitious and transformative proposals.

A number of evaluators described the greater breadth of scope as 'challenging', considering that evaluators for standard Horizon Europe RIA proposals are more used to focusing an area of 'specialist' technical expertise. However, in general, most evaluators found this broader scope to be enriching and appreciated how the diversity of evaluator perspectives added real value and created a collaborative atmosphere where input was genuinely heard and considered.

- **Transparency of the procedures:**

Overall, for all topics, the execution of all consensus and ranking procedures were clear and transparent. At the beginning of the evaluation, the evaluators were informed on the procedures, the evaluation process, the

scoring principles and its meaning and the IT tools to be used, i.e. SEP and WebEx. The procedures were clearly stated in the documentation, reiterated during the briefing sessions and when needed, panel moderators clarified the scoring system to the evaluators.

Every panel commenced its work with a briefing and explanations by the moderator (SO). Additionally, a briefing by the IHI Executive Director was presented for each panel. All the moderators were coherent and explained the procedures in a transparent manner. The need to treat proposals equally and in a consistent manner was reminded several times during the meetings. Clarifications were also provided to the evaluators with regards to the definition of weakness, shortcoming and minor shortcoming.

The moderators efficiently facilitated the consensus review process within their panels, maintained impartiality and urging evaluators to participate actively during the discussions, by providing their assessment/view, and ensuring equal treatments for all proposals. Throughout the discussion, evaluators were encouraged to identify the proposal's strengths, weaknesses, and shortcomings and ensure that the scores reflect the assessment for each evaluation criterion. Feedback from the quality control (IHI JU staff) was discussed by the evaluators and it was taken into consideration accordingly. Ultimately, the evaluators reached consensus on the scores per proposal and also on the ranking lists.

Evaluators were frequently made aware of the necessity to disclose any potential Conflict of Interest (Col) in order to take necessary measures, during evaluation and throughout the consensus and cross-reading tasks and meetings. The absence of Col was ensured through specific clauses in each individual's contract. In addition, preliminary Col check were performed using the tool available in SEP.

Including the presence of an IO, with the freedom to raise any questions to the evaluation staff (evaluators, moderators and the call coordinator), is a further indication of the commitment to full transparency in the evaluation exercise. All questions the observer raised were promptly and clearly answered without any restrictions. For transparency and openness, evaluators were also informed that they could raise any concerns with the observer if they wished.

- **Throughput time of the process and the efficiency of the procedures**

The overall evaluation process spanned from 29 April to 20 June 2025, with the period from 06 May 2025 to 25 May 2025 dedicated to individual remote evaluation and IER preparation, and the period from 26 May 2025 to 08 June 2025 for draft Consensus Report preparation. The consensus phase took place across two (2) weeks from 10 to 20 June 2025. This timeframe was sufficient to cover all phases of the evaluation process, including IER preparation, CR drafting, consensus meetings, quality of CR by the IHI legal officers and panel review cross-check and ranking meetings for the 39 eligible proposals being evaluated, allowing evaluators to complete their work efficiently.

Each expert evaluator was assigned between 2 and 6 proposals to review during the individual evaluation phase, which lasted about 2.5 weeks.

All consensus meetings were completed within or ahead of the assigned daily schedules, indicating that the throughput time was well planned and adequate. In fact, the consensus phase meetings for topic 2 finished a day ahead of schedule.

The workload on all moderators was very high, as they had to start their work before and continue after each day's meetings, in spite of which the moderation proved to be highly effective.

The workload and the provided time for the Quality Control, by IHI legal officers, of the CRs appeared to be appropriate, as indicated by the limited number of suggested changes. Overall, the efficiency of the procedures was maintained, ensuring a thorough and fair evaluation process.

- **Efficiency, reliability and usability of the implementation of the procedures, including the IT-tools:**

The observer noted a thoughtful and balanced selection of evaluators, and this was reaffirmed from evaluator's feedback to the observer, which described a very good balance of expertise, bringing a diversity of perspectives that added real value and created a collaborative atmosphere where input was genuinely heard and considered.

In general, the materials provided to evaluators in advance were clear, well-structured and gave enough time for evaluators to prepare. This contributed significantly to effective consensus discussions. Due to the high amount of proposals under assessment, it was noted that not all draft CRs were available to evaluators ahead of CR discussion meetings.

Evaluator feedback highlighted the SEP-merged IERs as an area of lack of efficiency, which increases the evaluator's workload. Multiple sub-criteria questions are evaluated and addressed in the same dialogue box, and not necessarily in order, requiring the rapporteur to spend extensive time cutting and pasting comments back together in order of the respective sub-criteria questions in order to create the respective draft consensus comments. While not an IHI JU-specific tool, feedback suggested that a more precise division of sub-criteria might streamline the process and ensure greater consistency of comments addressed by each IER. In addition, it was noted some parts of the editing and review process using MS Word and email used to exchange documents for edit and edited documents for the rapporteur to then add back into SEP, rather than conducting the consensus review process fully in SEP.

In general, the whole remote consensus review process was extremely well organised. In the discussion meetings, the pace was solid, the coordination smooth, and there was room for meaningful exchange. The SOs and IHI JU staff received many positive compliments from evaluator feedback. Consensus meetings for some of the proposals were quite challenging and, while robust discussion is fully expected, some discussions became quite protracted. This might be alleviated if all moderators were to give a brief but consistent reminder of the CR discussion goals and emphasise some best practices on 'how to effectively reach a consensus', before every new proposal is discussed, just to create the right starting mind-set. In this context, the observer noted that some of the most effective CR 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 the remote consensus phase, the Webex tool was employed. It was familiar to all participants and functioned without major technical issues. Occasionally, there were connection problems on the participant's end, but these did not adversely impact the evaluation process. Most participants turned off their microphones, while mostly keeping their cameras on, when they were not speaking, to maintain the quality of the exchanges. The internet for the building, where IHI JU has offices, did go down for one (1) full day, and this put additional pressure on staff and evaluators and required some late evenings and early starts the following day. That said, the IHI JU staff did an excellent job in maintain a professional approach, not letting any frustration show and allowing the review discussions to proceed effectively. Some evaluators expressed difficulties in changing between rooms and breakout sessions, difficulties in aligning the agenda with start times for some Webex meetings, and the observer and evaluator feedback noted some challenges in reaching evaluators, when they were needed. Indeed, some evaluators also expressed the feedback that they would not have been able to have availability of their time 'at all' if the consensus review process was to be 'in person'.

Overall, I believe the procedures, including the IT tools used in the present IHI evaluation, were reliable and robust. The implementation of these procedures was efficient and effective, contributing to a smooth evaluation process.

- **Impartiality, fairness and confidentiality:**

The observer is fully convinced that the evaluation process was fully compliant with the principles of independence, impartiality, objectivity, accuracy and consistency, fair and conducted in full compliance with all general Horizon Europe rules while also taking into account the specificities of the IHI Call 9.

Procedures were put in place to ensure an impartial, fair, transparent and confidential evaluation. Each group of evaluators was briefed by the responsible SO on the first morning of their evaluation. The guiding principles of independence, impartiality, objectivity, accuracy, and consistency were reiterated several times during the evaluation. Additionally, a briefing by the IHI Executive Director was presented for each panel. The procedures were highlighted including confidentiality and conflicts of interest.

The early detection and treatment of potential conflicts of interest were key to achieving impartial and fair evaluations. All evaluators, along with the observer, signed a declaration of the absence of COI as part of their contracts. The importance of avoiding COI was also reiterated to evaluators during briefings. Conflicts of interest are generally detected before the start of the evaluation but could also be uncovered during the evaluation.

The involvement of multiple panel members in the evaluation process for each proposal, with well-defined roles 5 or 6 evaluators, 1 IO, and 2 moderators (main and back-up), significantly contributed to achieving impartial and fair evaluations.

- **Conformity of the evaluation process witnessed with the evaluation procedures published in the HE Grants Manual:**

The evaluation process closely adhered to the rules and criteria specified in the Horizon Europe Grants Manual for assessing project proposals, including rigorous evaluation based on specific criteria of each sections i.e. excellence, impact and quality and efficiency of the implementation.

A notable aspect of the process was the commitment of all moderators to ensuring that evaluators assessed each proposal section independently and objectively, without veering into broad interpretations, extrapolations or providing recommendations. This approach maintained with good consistency and fairness across all evaluations.

In addition to these general procedures, the IHI JU evaluation team provided comprehensive briefing materials to the evaluators which offered detailed context and content specific to the call and its topics, ensuring that evaluators had a clear understanding of what was expected to be delivered.

- **Quality of the EU evaluation process in comparison with the evaluation procedures of national and/or other international research funding schemes:**

The whole evaluation process was of very high quality by comparison to equivalent national and international evaluation procedures, to which the observer has been party. Evaluators commended many aspects of the consensus-building approach, the involvement of multidisciplinary panels with high expertise, as well as the interactions among the fellow evaluators and moderators. Through the ongoing evaluations, evaluators gained valuable insights, and through the exchange of diverse expertise, they were able to appropriately refine their assessment based on fellow reviewers' input, all aimed at achieving consensus.

Most especially, evaluators recognised the effort, professionalism, support and engagement brought by the IHI JU staff, and especially the SOs and moderators.

- **Quality of the evaluation process overall:**

The evaluation was successfully completed on time with the overall quality of the evaluation found to be high and very professional. All eligible proposals were evaluated, scored and ranked in a transparent, fair and impartial manner. The overall quality of the evaluation was observed as being best practice with active discussion and diligent evaluation of all aspects of each proposal. Careful consideration was given to each evaluator's questions and expressed opinions. The IHI staff has performed an exemplary remote evaluation process. Accordingly, the evaluation process was observed to be of high quality and demonstrated consistency, fairness and transparency.

3 Any other remarks

- **Quality of the documentation provided to evaluators beforehand:**

All evaluators and the observer had access to the relevant documents needed to conduct a high quality evaluation process, which were provided during multiple different specific briefings along with the usual documents that applicants had been using to prepare their proposals, available on the "Funding and Tender portal" (such as the IHI work programme and the relevant annexes, the IHI application forms, the evaluation forms, usable for both IERs and CRs).

The observer found the quality of the documentation provided to be of very high quality, and this was echoed from evaluator feedback received.

- **Quality of the remote briefing sessions:**

The observer attended a dedicated briefing on 04 June 2025, organised by the Call Coordinator. Every consensus panel commenced its work with a briefing and explanations by the moderator (SOs). These high-quality and comprehensive briefings covered the relevant topics thoroughly, while providing evaluators and the observer the opportunity to ask any remaining questions before starting the consensus phase, feedback from evaluators was broadly complimentary of the quality of the briefing sessions.

- **The understanding by evaluators of the call (context, topics), of the evaluation process and their role and of the award criteria and scoring scheme:**

All evaluators were well-informed about the call and the specific topics they were evaluating. They understood the significance of their role in determining the funding decisions for the proposed projects. The instruction to evaluate the proposals as written and to refrain from recommending substantial changes or improvements was clearly comprehended by the evaluators.

Most evaluators demonstrated a good understanding of the award criteria and scoring scheme. However, across the consensus phase, some evaluators expressed confusion and misunderstanding about aspects of the scoring scheme, such as distinguishing between the use of weakness and significant weakness, and in the use of certain qualifiers and their relation to the appropriate scoring, as follows:

- In the evaluation template there is 'weakness and serious weakness', however in the briefing interpretation of the scores, there is description of serious inherent weaknesses and significant weaknesses. This led on occasion to some confusion and interchange between the use of serious weakness and significant weakness. Evaluator feedback highlighted the situation where a single 'weakness' would render a project 'below threshold' for funding, while a number of shortcomings would not.
- Some lack of clarity was observed relating to the use of certain qualifiers, most especially the word 'adequate', which depending on context can be read as a positive or a negative. The evaluation template guides a declining value scale from excellent, very good, good, adequate, and poor. In this context 'adequate' equates to 'fair' and just above poor. However, if not very careful with context and a full qualifying statement there is risk of confusion.

Moderators did a good job in promptly addressing and clarifying these concerns, including through reference to the scoring scheme through on-screen sharing. Throughout my observation, moderators consistently referenced the scoring scheme before finalizing the consensus and awarding scores, which enhanced the integrity of the evaluation process.

Other important aspects well understood by evaluators included the requirement to provide comments before assigning scores, avoiding double penalization or reward for the same reason under different criteria, emphasizing the quality of the consensus report for clear feedback to applicants and to prevent potential disputes, and maintaining consistency between comments and scores.

Overall, the evaluators demonstrated a solid understanding of their roles, the evaluation criteria, and the importance of maintaining fairness and consistency throughout the evaluation process.

- **The allocation of evaluators to proposals: balance (gender, geographic, sector), relevance and balance of evaluators:**

For the evaluation of the thirty nine (39) eligible proposals in this call, eighty three (83) evaluators were invited; selected based primarily on their evaluators and coverage of the various facets of the call. Efforts were made to maintain a balanced gender representation, geographic diversity and diversity in the types of organizations represented:

- Gender Balance: 45% of the evaluators were women, indicating a significant effort towards gender balance in the evaluation panel.
- Evaluators and Experience: Among the evaluators, 9% were first-time evaluators for Horizon Europe, while 13.5% were new evaluators, who had not participate in evaluations in the previous three calendar years. This mix ensured a blend of experienced evaluators and fresh perspectives.
- Geographical Coverage: Evaluators were recruited from 20 different EU countries, as well as from Associated Countries (United Kingdom) and Third Countries (United States, Canada and Switzerland) aiming to provide diverse perspectives and ensure regional representation.
- Sector Representation: Among the evaluators, 19% came from private for-profit organizations, highlighting the involvement of industry perspectives. The remaining evaluators were from higher or secondary education organizations, research institutions, or other public bodies such as hospitals or government-funded agencies.

Overall, the allocation of evaluators aimed to ensure a comprehensive evaluation process that considered the broad spectrum of expertise needed for the diverse criteria and sub-criteria of the call.

- **The process of the individual evaluations and the actors involved:**

The individual evaluation process was conducted from 06 May 2025 to 25 May 2025 in a fully remote manner with no interaction between the observer and the evaluators. Therefore, the quality of the process and the evaluators involved can only be judged by the review of IER. The observer reviewed a few randomly selected IERs and found all of them to be of good quality. Another opportunity to assess the evaluators was during the consensus meeting, where overall, all evaluators demonstrated high competence in their respective fields and maintained a professional conduct.

- **The process of the consensus meetings and the actors involved:**

The observer attended the consensus meetings scheduled from 10 to 20 June 2025 for the evaluation of Horizon Europe projects under the Innovative Health Initiative (IHI) Call 9. All consensus phase meetings were completed within or ahead of the assigned daily schedules, indicating that the throughput time was well planned and adequate. In fact, the consensus phase meetings for topic 2 finished a day ahead of schedule.

On the first day for each topic, significant time was dedicated to discussing the initial proposal across all panels. This initial discussion period is typical, and allows the evaluators opportunity to seek clarifications and establish a common understanding of the consensus process for subsequent evaluations. Moderators played a crucial role by providing necessary clarifications and fostering an inclusive environment where evaluators felt comfortable raising concerns.

The WiFi for the IHI JU building did go down for one (1) full day, and this put additional pressure on staff and evaluators and required some late evenings and early starts the following day. That said, the IHI JU staff did an excellent job in maintain a professional approach, not letting any frustration show and allowing the review discussions to proceed effectively.

- **Criteria and scoring scheme: appropriateness, completeness, relevance, clarity, consistency in application:**

The three main criteria and their sub-criteria applicable to the evaluation process were thoroughly explained to all evaluators, who demonstrated a strong understanding of these criteria. Additionally, all evaluators were well-versed in the scoring system and understood the significance of score thresholds. Throughout the evaluation, the score interpretation table served as a useful reference to ensure consistency and clarity in scoring against agreed-upon comments for each criterion.

Overall, the criteria and scoring scheme were appropriately understood and/or clarified during the remote meetings, and consistently applied by evaluators during the consensus review phase, highlighting the effectiveness of the moderators in ensuring fairness and accuracy in the evaluation process.

However, in relation to the Horizon Europe requirement to evaluate the technical robustness of Artificial Intelligence (AI), some evaluators expressed that they were not sufficiently expert in AI to make such an evaluation. The annotated Evaluation Template might have been more prescriptive, and for example did not differentiate between proposal where AI was 'being developed' or was simply 'used as a tool'; something that is important given how ubiquitously the term AI is now being used. Some evaluator feedback cautioned that proposals without AI at all might indirectly benefit simply by avoiding potential penalisation, and evaluators requested more clear and consistent guidance on how to evaluate AI technical-robustness and how to articulate this in their comments and scores.

- **The process of the final panel meeting and the actors involved:**

The final panel (ranking) meetings, which culminated in the preparation of the final ranking lists for each topic, were conducted efficiently and smoothly. Where proposals had equal scores, an ex-aequo process was taken to rank these. This was done in accordance to the Horizon Europe rules for ex-aequo and the additional information highlighted in the IHI Annual Work Programme 2025.

Before finalizing the ranking list, all evaluators formally expressed their agreement with the consensus reports and the final ranking list, thereby endorsing the evaluation results. This consensus ensured that the evaluation process concluded with a unified decision supported by all participating evaluators.

Overall, the final panel meeting served as a critical step in solidifying the evaluation outcomes, marking the conclusion of a thorough and well-coordinated evaluation process.

- **The process of the hearings (if any) and the actors involved:**

N.A.

- **The occurrence and handling of specific issues (if any) such as conflicts of interest:**

N.A.

- **The quality of evaluation summary reports:**

The importance of providing high-quality ESRs was clearly emphasized to all evaluators, considering that these reports represent the sole feedback received by applicants after extensive effort and dedication. Throughout the evaluation process, all involved parties diligently adhered to this directive. The observers' independent review of randomly selected ESRs confirmed that they consistently delivered fair, clear, and valuable feedback to the applicants. Constructive comments were present where warranted, aiming to guide applicants in refining their future proposals.

The presence of constructive feedback is particularly beneficial as it encourages applicants to enhance their submissions for future opportunities. This approach not only supports the continuous improvement of proposal quality but also reflects the commitment to fostering a supportive and developmental environment within the evaluation process.

Overall, the quality of the ESRs underscored the dedication to providing meaningful feedback, thereby contributing to the enhancement of future applications and the overall effectiveness of the evaluation process.

- **Overall conduct of staff: responsiveness, hospitality, competence etc:**

Through all phases of the evaluation process, the observer was consistently impressed by the professionalism and support demonstrated by all IHI JU staff involved in the evaluation. Their high degree of responsiveness and competence significantly contributed to the smooth operation of the evaluation.

All questions, whether from evaluators or the IO, were addressed promptly and efficiently. This responsiveness ensured that any queries or concerns were resolved in a timely manner, thereby facilitating the continuity and efficiency of the evaluation process.

- **Infrastructure and working conditions for evaluators:**

The complete evaluation process, including both the individual assessment and consensus phases, was conducted remotely. Subject only to comments elsewhere in this report relating to the use of SEP and Webex, all evaluators and moderators appeared to have reasonably effective access to good working conditions and the necessary infrastructure to perform their roles effectively, and process was conducted without significant technical or logistical hindrances.

- **Workload and time given to evaluators for their work, (remotely and/or on-site, as applicable):**

While demanding, the overall time allocated the complete evaluation process (individual and consensus) was adequate.

- **Remuneration of evaluators (in relation to workload):**

While a few evaluators commented that the level of remuneration was low relative to the workload, and noted that the base daily rate had not increased in some years (relative to inflation), the feedback regarding remuneration in relation to workload was overall generally positive.

4 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:

- 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.
- 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':

- 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.
- 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':

- 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:

- 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.