

IHI JU responses to the Independent Observer's reports

Call ID: HORIZON-JU-IHI-2024-08-two-stage

IHI JU 8th Call for Proposals – stage 1 & stage 2 evaluations

Dates of evaluation: 11 - 13 November 2024 (stage 1)

15 May 2025 (stage 2)

Name of the Independent Observer: Kim Reilly

Summary of Recommendations

Overall, it was clear that the proposal evaluation was conducted by very competent experts with complementary expertise. The experts took great care and a professional approach to treat each proposal fairly and equally. In addition, experts discussed and debated proposals to ensure fit with the call topic requirements. The IHI moderators were excellent, highly skilled and professional, they consistently provided clear guidance to the panels, managing time efficiently, bringing them back to focus on the requirements of the call topic and carefully ensuring that any negative aspects were equally penalised across all applications.

The Independent Observer (IO), in collaboration with expert evaluators, proposed the following recommendations.

1. In order to facilitate the drafting of the consensus reports it will be essential to identify in a timely manner the experts' comments. IHI Office is invited to explore this possibility within the IT tools for example using colour coding for each expert.
2. Applicants should be advised to use specific keywords in order to help evaluators to find the relevant sections. This comment was in relation to the call documentation provided by IHI to applicants, it was suggested to reiterate to applicants the importance of responding directly to the instructional text in the application template (part B) and showing how their proposal addresses that aspect.
3. The evaluation's complexity occasionally led to unscheduled or rescheduled breaks, making time management challenging as flexibility was required to accommodate sessions running over or under time. Potential solutions could be explored, such as a shared dynamic webpage or a Teams sheet where moderators could provide real-time updates on each day's topics.

4. Overall gender balance in the expert group overall was very good and in line with the commitments set out in Section 5.1 of the Guide for applicants and the underpinning Commission Decision 2000/407/EC of 19 June 2000 relating to gender balance within committees and expert groups. However, if possible, it would be positive if the gender balance within each Topic panel should meet the best practice of at least 40% of both males and females.

IHI JU responses to the recommendations

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

1. To better reflect the different comments from experts, IHI office will better highlight to rapporteurs the importance of distinguishing, at an early stage, the comments from different experts, identifying any potential divergent opinions. IHI office will also investigate, with the IT EC helpdesk, the possibility to use color coding, since this feature is not currently included in the software used for evaluation.
2. IHI recalls that all Horizon Europe programs use the templates provided in the EU Funding and Tenders Opportunities portal. Nevertheless, the IHI office acknowledges this recommendation and to the extent possible will communicate it to applicants through the IHI calls documents.
3. Taking into consideration the level of complexity of each evaluation, IHI office will investigate the available options for moderators to increase the exchange of information regarding sessions running over or under time and make the flow of the evaluation more effective. IHI office will also investigate the possibility to prepare agenda for central meetings with sufficient time-break. This will provide some degree of flexibility, in adapting the timing to the needs of evaluators and moderators.
4. We fully acknowledge the importance of ensuring gender balance not only at the group level but also within each panel. While we strive to achieve this best practice of at least 40% representation of both genders, it can be challenging at times due to factors such as the availability of qualified experts in specific fields. Nonetheless, we will continue to make every effort to improve in this area and to align more closely with the recommended standards in future selection processes.