

# HORIZON EUROPE

## TOWARDS SUCCESSFUL PARTICIPATION



### KEY MESSAGES

- ✔ Researchers should become innovators
- ✔ Research results should be transformed into useful innovations
- ✔ Science needs to make available the results openly = data as well
- ✔ Open innovation is key = collaboration
- ✔ Citizens should be involved into science
- ✔ Focus on global societal challenges
- ✔ Results lead to impact
- ✔ Open to the world
- ✔ Simplification
- ✔ Synergies

### STRUCTURE

## CHANGES

#### Strengthening the European Research Area

- Budget increases, new options are included

#### European Innovation Area

- New decentralized initiative to empower all innovators and entrepreneurs to realise their full potential

#### Multiannual Strategic Plan 2021-2024, 2025-2027

- Sets out the Key Strategic Orientations for research and innovation support, including a description of the clusters, the expected impacts, cross-cluster issues, and intervention areas covered

#### Clusters under Pillar II

- Not silos, but with a lot of cross-cluster connections

#### Missions in Horizon Europe

- 5 missions to solve some of the greatest challenges. Missions will be implemented through research projects, policy measures and legislative initiatives. Mission topics will be incorporated into the Work Programmes.

#### Climate change

- The programme is expected to contribute with 35% of its budget spent to climate objectives

#### New schemes to support innovation

- EIC instruments: EIC Pathfinder, EIC Transition, EIC Accelerator and the European Innovation Ecosystems

#### Complementarity and synergies in supporting innovation

- ERC, EIC, EIT and InvestEU will be complementary to each other in supporting innovators

#### New groups for European Partnerships

- 49+9 partnerships grouped in three types: co-programmed, co-funded and institutionalized. Some are completely new, and others build on previous ones

## PROPOSAL WRITING AND EVALUATION

**WHAT IS NEW?**

- Shorter application – new page limit for the full application: IA, RIA 45 pages, CSA 30 pages
- New fields in Part A – list of researchers involved in the project, role of participating organization
- Gender Equality Plan (GEP) – new eligibility criterion for public bodies and higher education organizations
- Extended budget template for the proposal
- New perspectives to be described in the Excellence section, such as open science practices to be implemented; research data management and management of other research outputs; integration of social sciences
- Impact section – new logic in Horizon Europe: expected outcomes of the topics, delivery of impacts in line with the Key Impact Pathways, indication of the scale and the significance of the project contribution to the outcomes and impacts
- Key element of the impact section: a new section 2.3 Summary
- Removal of assessment of Management Structure
- Due diligence regarding the trustworthiness of all AI based systems and solutions used or developed in the Horizon Europe projects
- Extended proposal evaluation criteria
- Extended use of lump sum scheme with detailed budget development, but no cost reporting
- “Do no significant harm” principle



## WHAT SHOULD BE DONE

**PREPARE**

- Understand the complementarities between the programmes and partnerships, national funds and prepare an EU R&I Funding strategy for the organization with thematic focus areas
- More experts are needed for handling legal conflicts, IPR arrangements - protecting the organizational interests
- Decisions and specific policies are needed on organizational level - specific conditions are needed for EU projects where results are achieved from public money
- Innovation advisers are needed or bigger role for TTOs
- Streamline all EU funding reporting protocols
- Set up regular cooperation with industrial players and platforms, set up open innovation policies and rules
- Continuous training is needed on the above issues

## PROJECT MANAGEMENT AND FINANCES

## TO NOTE

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- ✓ Mutual Insurance Mechanism 5-8% – the new Guarantee Fund
  - ✓ New structure of the Model Grant Agreement – new Data sheet and Specific annex for 'special rules' (Annex 5)
  - ✓ Changes in the terminology – Affiliated entity in Horizon Europe = Linked third party in H2020
  - ✓ Daily rate calculation, not hourly rate for actual personnel costs
  - ✓ Time recording system in hours - Day equivalent – 3 conversion rules to calculate your day equivalent
  - ✓ Project-based remuneration replacing additional remuneration
  - ✓ In-kind contributions against payment – No more specific Article
  - ✓ Beneficiaries must ensure open access to peer-reviewed scientific publications relating to their results
  - ✓ A complete exploitation, dissemination and communication plan has to be submitted by M6 of the project
  - ✓ Updated Data Management Plan template
  - ✓ Exploitation carefully monitored – Result ownership list (ROL) in the last reporting period
  - ✓ Certificate on Financial Statements (CFS)– higher thresholds
  - ✓ System and Process Audit – option for beneficiaries that have participated in several actions under H2020 and are involved in Horizon Europe projects
  - ✓ New until cost calculation option from 1 May 2024 for personnel cost reporting

## GET ADDITIONAL SUPPORT



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