



SENSITIVE

OBSERVER REPORT

CALL	
Call:	HORIZON-JU-ER-2025-02
Topic(s):	HORIZON-JU-ER-2025-EXPLR-01 HORIZON-JU-ER-2025-FA4-01 HORIZON-JU-ER-2025-FA3-01 HORIZON-JU-ER-2025-FA1-TT-01 HORIZON-JU-ER-2025-EXPLR-02 HORIZON-JU-ER-2025-FA5-01 HORIZON-JU-ER-2025-FA6-01 HORIZON-JU-ER-2025-EXPLR-03 HORIZON-JU-ER-2025-FA2-01 HORIZON-JU-ER-2025-EXPLR-04
Type(s) of action:	IA, RIA & CSA
Service:	EU-RAIL
Call deadline:	11/02/2026
Submission model:	Single

EVALUATION	
Evaluation model:	Single
Panel(s):	Panel 1, Panel 3.
Observer(s):	Michael Garrett

TABLE OF CONTENTS

SUMMARY FOR PUBLICATION.....	2
1. BACKGROUND AND SCOPE.....	3
2. OBSERVER ASSESSMENT	3

SUMMARY FOR PUBLICATION

Summary for publication

Include a summary of the main findings for publication in a call update in the Portal, including the overall assessment on the conduct and fairness of the evaluation sessions, and compliance with the applicable rules. (max. 2000 characters).

 *The content of this section will be published in the Portal as a call update.*

The evaluation of the call HORIZON-JU-ER-2025-02 was conducted in a professional, transparent and well-structured manner, with a very high overall standard of execution. The process involved parallel panels operating over five days, managing a moderate to high level of complexity effectively.

The conduct of the evaluation sessions was robust and well organised. Moderators ensured balanced discussions, alignment between scores and comments, and full participation of panel members. Consensus was generally achieved through open and constructive exchanges, with due consideration given to differing opinions. EU-RAIL staff provided strong operational and procedural support throughout.

The evaluation process was fair and impartial. There was no evidence of bias or inappropriate influence, and confidentiality requirements were respected. Observers present during the process adhered strictly to their roles. The integrity of the evaluation was therefore fully maintained.

Compliance with the applicable rules and guidance was very good. The initial briefing clearly set expectations, and procedures were consistently followed, including quality checks and validation steps. The use of remote evaluation tools proved effective and reliable, supporting efficient interaction and timely completion of the process.

Some minor operational improvements could be considered, including ensuring full availability of panel members, improving scheduling of breaks, and enhancing remote working practices (e.g. clearer role identification and technical preparation). These issues did not materially affect the outcome.

Overall, the evaluation was conducted to a very high standard, demonstrating strong adherence to principles of fairness, transparency, and compliance with the established rules.

1. BACKGROUND AND SCOPE

Background and scope

This report describes the observer's assessment of the evaluation of the following call:

Call for proposals: HORIZON-JU-ER-2025-02

Deadline: 11.02.2026

Budget: EUR 148200000.00

This call covers the following topic(s)/type(s) of action:

HORIZON-JU-ER-2025-EXPLR-01

HORIZON-JU-ER-2025-FA4-01

HORIZON-JU-ER-2025-FA3-01

HORIZON-JU-ER-2025-FA1-TT-01

HORIZON-JU-ER-2025-EXPLR-02

HORIZON-JU-ER-2025-FA5-01

HORIZON-JU-ER-2025-FA6-01

HORIZON-JU-ER-2025-EXPLR-03

HORIZON-JU-ER-2025-FA2-01

HORIZON-JU-ER-2025-EXPLR-04

IA, RIA & CSA action

The report analyses the efficiency of the procedures, usability of the instruments (including IT tools), conduct and fairness of the evaluation sessions, and compliance with the applicable rules.

The objective is to give independent advice for improving the evaluation processes for EU funding.

2. OBSERVER ASSESSMENT

Methodology

Methodology

Describe how you proceeded for observing the evaluation procedure (e.g. participation in briefing; present at evaluation session; analysis of IERs, CRs and panel report; comparison with similar procedures at national/international level; etc).

I attended the General Briefing Session at the start of the evaluation and subsequently observed the Consensus Report (CR) meetings across two panels (Panel 1 and Panel 3). During the first two days, I rotated regularly between the panels, typically joining each for around 30-minute intervals. Panel 1 completed its evaluation by the end of the second day. For the remaining three days, I focused exclusively on observing Panel 3. This provided a representative overview of each panel's functioning, dynamics, and progress.

The observation covered the full duration of the evaluation (five days), including discussions on scoring, preparation and drafting of the Consensus Reports, panel report sign-off and final ranked list of proposals. I also monitored interactions between evaluators, moderators, rapporteurs, and EU-RAIL staff, as well as the use of IT tools and adherence to procedures.

This approach allowed me to assess the efficiency, fairness, transparency, and overall conduct of the evaluation process, and to compare it with similar evaluation exercises at national and international level.

Assessment

<p>Assessment</p>
<p>Scale of complexity of the evaluation task</p> <p>The evaluation was of moderate to high complexity. Multiple proposals were assessed across parallel panels, requiring sustained engagement over several days. The workload associated with drafting and refining Consensus Reports was significant, particularly in Panel 3 where considerable effort was required to align comments and ensure quality over many proposals.</p> <p>Despite this, panels were generally able to manage the complexity effectively, although the intensity of the schedule required careful pacing to maintain performance.</p>
<p>Transparency of the procedures</p> <p>The evaluation process was conducted in a transparent manner. Panel discussions were open, and all members were given the opportunity to express their views. Outlying opinions were actively considered, and consensus was typically reached through constructive discussion.</p> <p>Moderators ensured that scoring was aligned with the discussion and that all viewpoints were taken into account. This contributed to a clear and transparent decision-making process across both panels.</p>
<p>Throughput time of the evaluation and the efficiency of the procedures</p> <p>Overall, the evaluation process was efficient, with panels making steady progress and generally adhering to the planned schedule. Consensus was often reached relatively quickly on most issues.</p> <p>However, there were some minor inefficiencies:</p> <ul style="list-style-type: none"> • Occasional delays due to late arrival or temporary absence of panel members. • Some sessions extended beyond planned times. • In certain instances, lunch breaks were scheduled too late, which may impact performance and wellbeing. <p>Despite these issues, the overall throughput remained good, and panels completed their work within the allocated timeframe.</p>
<p>Efficiency, reliability and usability of the procedures, including the IT-tools</p> <p>The evaluation was conducted remotely using MS Teams and the Commission's evaluation platform. Overall, the tools were efficient and reliable. Remote working proved to be highly effective, and in some respects can be considered significantly more efficient than in-person meetings.</p> <p>Minor issues observed included:</p> <ul style="list-style-type: none"> • Occasional poor internet connectivity for some panel members, including recorders/rapporteurs. • Screen-sharing quality issues (e.g. unclear text, inappropriate desktop backgrounds). • Limited visibility of participant roles within Teams (evaluator, moderator, rapporteur, observers, independent observer), making it harder to assess engagement and assess roles. <p>These issues did not significantly affect the evaluation but could be improved with clearer guidance and technical preparation.</p>

Impartiality, fairness and confidentiality of the evaluation

The evaluation was conducted with a high degree of impartiality, fairness, and confidentiality. Panel members typically behaved professionally, and there was no evidence of bias or inappropriate influence.

Observers from relevant institutions were present but did not intervene or express opinions on proposal quality, fully respecting their role.

Moderators maintained neutrality at all times and ensured that discussions remained focused and balanced. Overall, the integrity of the evaluation process was well preserved.

Conformity of the evaluation with the applicable rules (including guidance documents)

The evaluation followed the applicable rules and procedures. The briefing session clearly explained the evaluation criteria, confidentiality requirements, and consensus process, providing a solid foundation for the panels.

Moderators and EU-RAIL staff ensured compliance throughout, including alignment between scores and comments and adherence to reporting requirements. The Quality Checks performed by EU-RAIL staff were extremely important in this regard.

In general, conformity with the rules was very good.

Quality of the evaluation process in comparison with similar national/international evaluation procedures

In comparison with similar evaluation processes at national and international level, the overall quality of the evaluation was high. This is also true in comparison to other panels I have witnessed operating in other calls supported by Horizon Europe.

The structured approach, strong moderation, and active involvement of EU-RAIL staff contributed positively. The use of remote tools enabled broad participation and efficient interaction among panel members.

The inclusion of an Independent Observer remains a particular strength of the Horizon Europe process, providing an additional layer of oversight not always found in national systems.

Overall quality of the evaluation

The overall quality of the evaluation process was good. Panels demonstrated professionalism, expertise, and commitment throughout the process.

Strengths included:

- Effective moderation and support from EU-RAIL staff.
- Open and constructive discussions leading to consensus.
- Efficient use of remote tools.
- Good overall adherence to procedures.

Areas for improvement include:

- Ensuring full availability and engagement of all panel members.
- More consistent scheduling of breaks.

Despite these very minor shortcomings, the evaluation process was generally robust, fair, and of a high standard.

--

Other remarks

- **Briefing session:** The opening session was well delivered, clear, and set appropriate expectations for evaluators.
- **Panel engagement:** While most panel members were engaged, some appeared less active during certain phases (e.g. final submission stages or when cameras were off).
- **Time management:** Breaks should be more consistently scheduled and not dependent on proposal completion.
- **Remote working practices:** Encouraging camera use and clearer role labelling in Teams would improve engagement and transparency.
- **Panel composition:** Gender balance within the panels was good.
- **Workload:** Drafting Consensus Reports was sometimes demanding, particularly where extensive revisions were required. Panel 3 did not finish until day 5 at 18.40.

Recommendations

Recommendations

- Re-emphasise the need for panel members and recorders to be available throughout the evaluation period as required.
- Introduce clearer scheduling of breaks (morning, lunch, afternoon) independent of proposal completion and quality control feedback.
- Encourage consistent use of cameras to improve engagement.
- Clearly label participant roles within MS Teams (evaluator, moderator, rapporteur, observer, independent observer).
- Provide guidance on appropriate screen sharing (e.g. neutral and appropriate backgrounds).
- Reinforce minimum technical requirements (e.g. connectivity) for panel members.
- Consider short feedback interactions between the independent observer and one or two panel members at the end of the process.
- Moderators should briefly acknowledge the role and contribution of the independent observer at the end of the panel meeting, in addition to panel members.