

# Experts, Evaluators and other EU Entities

Lorenzo Magnea - Università di Torino

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# Disclaimer

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2. The expert undertakes to observe strict **confidentiality** in relation to their work. To this end, the expert:

- (a) must not use confidential information or documents for any purpose other than fulfilling their obligations under the Contract without prior written approval of the contracting party
- (b) must not disclose, directly or indirectly, confidential information or documents relating to proposals or applicants, without prior written approval of the contracting party.

In particular, the expert:

i. must not discuss any proposal with others, including other experts or contracting party or relevant service staff not directly involved in evaluating the proposal, except during the formal discussion at the meetings moderated by or with the knowledge and approval of the responsible contracting party or relevant service staff

ii. must not disclose:

- any detail of the evaluation process and its outcomes or of any proposal submitted for evaluation for any purpose other than fulfilling their obligations under the Contract without prior written approval of the contracting party
- their advice to the contracting party or relevant service on any proposal to the applicants or to any other person (including colleagues, students, etc.)
- the names of other experts participating in the evaluation.

iii. must not communicate with applicants on any proposal:

- during the evaluation , except in panel hearings between experts and the applicants organised by the contracting party or relevant service as part of the evaluation process;
- after the evaluation.

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**All characters appearing in this work are fictitious. Any resemblance to real persons, living or dead, is purely coincidental.**

Who are the experts?





Your Gantt chart looks horrible, Potter!





No reference to AdS/CFT in the Bible,  
brother William!

**SCHWARZENEGGER**



**ERASER**

El borrará tu pasado para proteger tu futuro.

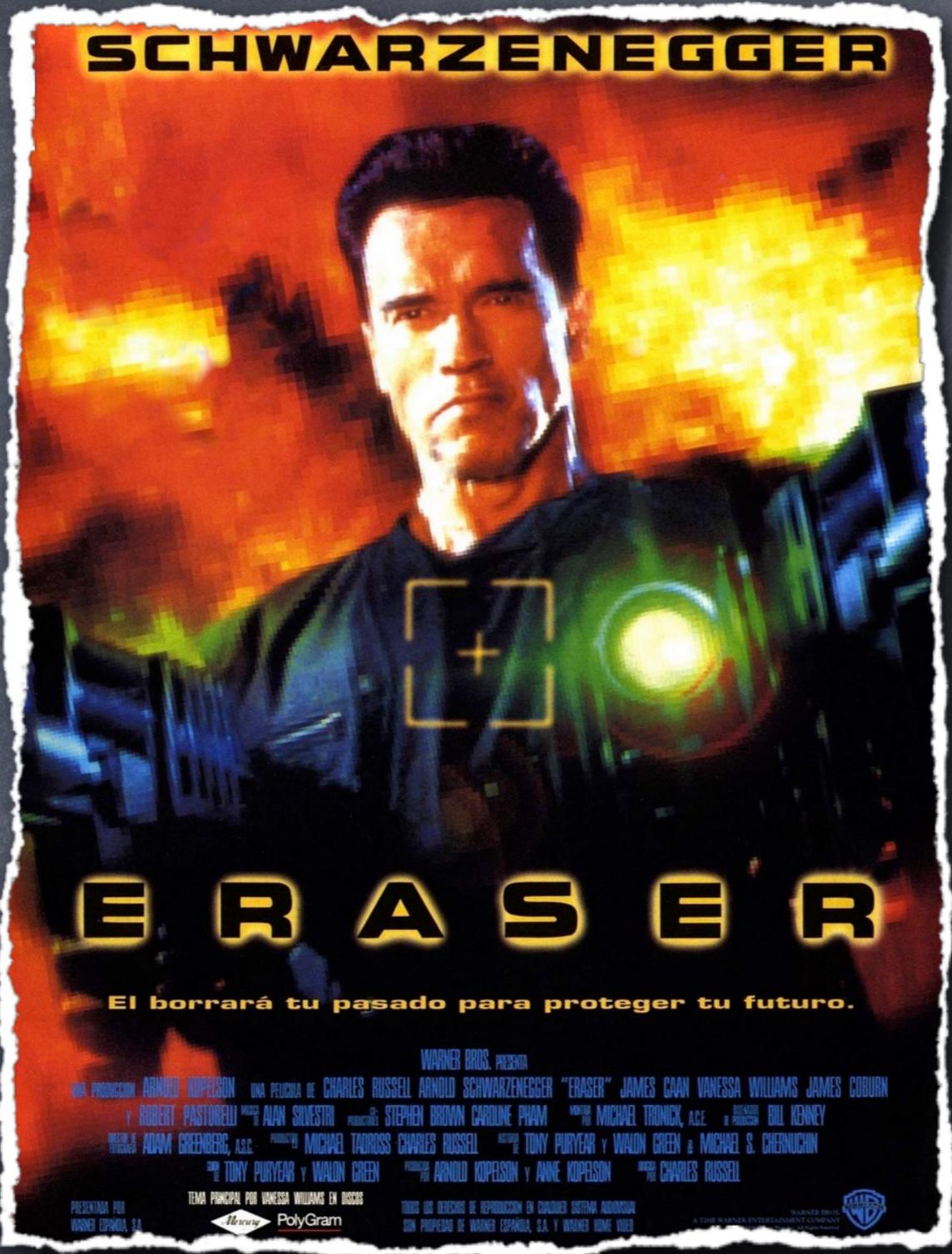
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Y ROBERT PASTORELLI MÚSICA DE ALAN SILVESTRI PRODUCTORES: STEPHEN BROWN CAROLINE PHAM EDITOR MICHAEL TRONICK, A.C.E. DIRECTOR DE FOTOGRAFIA BILL KENNEY  
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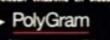


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CANTANTE DE TONY PURYEAR Y WALTON GREEN PRODUCTORES ARNOLD KOPELSON Y ANNE KOPELSON DIRECTOR DE ARTE CHARLES RUSSELL

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You haf been evaluated.

... not surprisingly, in some countries ...

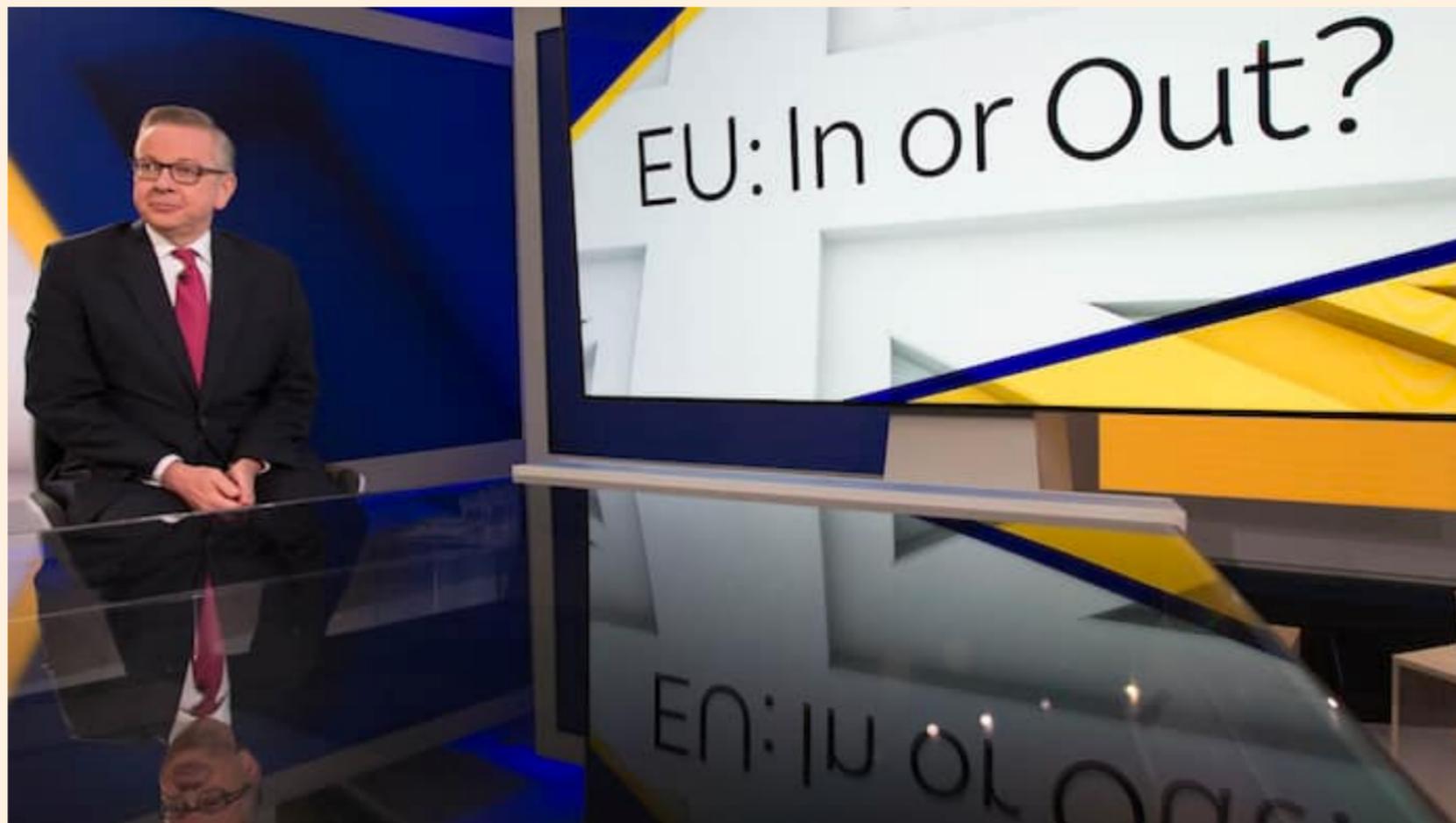
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**Brexit**

[+ Add to myFT](#)

## Britain has had enough of experts, says Gove

Brexit campaigner offers to have disputed EU contribution figure audited



*Justice Secretary Michael Gove takes part in a live Sky News Q&A on Brexit © PA*

... seriously:

... seriously:

## 2. Evaluation by independent experts

In order to ensure that only proposals of the highest quality are selected for funding, we rely on **independent experts** for the evaluation of proposals ('evaluators').

**How are the evaluators selected?** We appoint independent evaluators for each call from the database of experts. When selecting evaluators, we look for:

- a high level of skill, experience and knowledge in the relevant areas (*e.g. project management, innovation, exploitation, dissemination and communication*)

and, provided the above condition can be satisfied, a balance in terms of:

- skills, experience and knowledge
- geographical diversity
- gender
- where appropriate, the private and public sectors, and
- an appropriate turnover from year to year.

In principle, your proposal will be examined initially by at least three experts (in many cases, five or more).

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[do the math: it's heavy, intensive work]
- How close to your field are they?  
[at least one, `very close`; no one `too far`]  
[but remember, the metric must cover all of physics!]

So, who are the experts?

Well, let's look at one ...

... and learn what you should not do.



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[if there is a problem, solve it, or highlight it...]
- Thou shalt do your homework.  
[yes, even outreach. You can figure it out.]

The process

# For MSC IF, but not only

## 4. Evaluation process

The evaluation process has **three phases**:

Phase 1 — Individual evaluation

Phase 2 — Consensus group

Phase 3 — Panel review

Before starting the evaluation process, the **experts are briefed** on:

- the evaluation processes and procedures (including selection and award criteria)
- the content of the R&I topics under consideration
- the terms of their contract (*e.g. confidentiality, impartiality, conflicts of interest, completing tasks and approving reports, penalties for non-compliance*)
- disregarding excess pages
- the need to evaluate proposals as they were submitted, rather than their potential should certain changes be made.

**⚠** In Horizon 2020, there will no scope for recommending improvements to proposals (including improvements on the budget). In particular, proposals with a significantly inflated budget, taking into account cost efficiency considerations, will receive a lower score and may not pass the threshold.

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Each expert carries out an evaluation and prepares an '**individual evaluation report (IER)**' with comments and scores for each criterion.

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The '**panel report**' includes the '**evaluation summary report (ESR)**' for each proposal (based on the consensus report, including comments and scores, and taking into account the panel's deliberations and any new scores or comments considered necessary), with explanations and a list of proposals passing all thresholds, along with a final score, ('**panel ranked list**') and, where necessary, the panel's recommendations for a priority order for proposals in the event of equal scores, using the procedure set out in the work programme.

Picture a lot of spell-checking when your goose is already cooked

In summary

How well does it work?

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- In bocca al lupo!

Thank you