



TECHNOLOGICKÉ
CENTRUM PRAHA

MODUL 9 JAK SE STÁT HODNOTITELEM

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31. října 2023



KOMUNIKACE

- Dotazy nám pište průběžně do SLIDA
- Nebo se ptejte přímo

SLIDO ANKETA



AGENDA

1
—

Program
Horizont
Evropa

2
—

Registrace
a výběr
hodnotitelů

3
—

Evaluace žádostí
a projektů
- pohled experta

4
—

Hodnotící
proces
- pohled experta

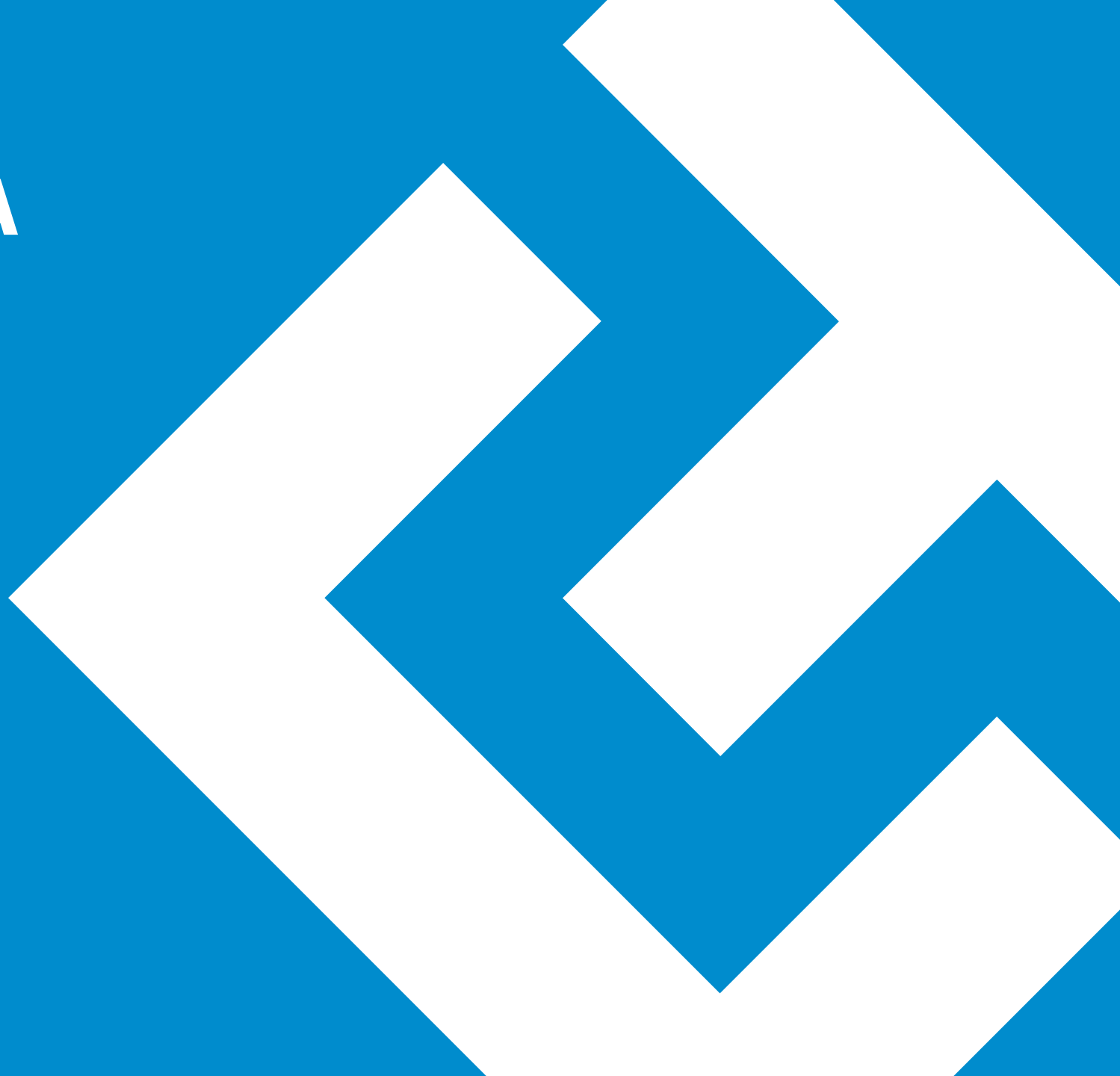
5
—

Příprava
hodnotící
zprávy

6
—

Pravidla
odměňování
hodnotitelů

**PROGRAM
HORIZONT EVROPA
2021 - 2027**





NÁŠ WEB

www.horizontevropa.cz

- Web Národního informačního centra pro evropský výzkum TC Praha
- Adresář národních kontaktů
- Aktuality, kalendář akcí, výzvy, úspěchy
- Právní a finanční aspekty
- [e-learning](#), [youtube kanál](#), [podcasty](#)
- Odběr [Zpravodaje](#), Novinek
- CZ/EN verze

PROGRAM HORIZONT EVROPA, KLASTRY



* The European Institute of Innovation & Technology (EIT) is not part of the Specific Programme

PRACOVNÍ PROGRAMY - VÝZVY

- Funding and Tenders Opportunities Portal
- filter by programme (Horizon Europe)
- How to participate
- Reference documents
- Work programme and call documents
- 2023–2024 HE main work programme
- název klastru (např. **Health**)

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents>

European Commission | Funding & tender opportunities
Single Electronic Data Interchange Area (SEDIA)

EN Register Login

HOME SEARCH FUNDING & TENDERS HOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT

Reference Documents

Programming period
2021-2027

Filter by programme:
Horizon Europe (HORIZON)

Clear filter

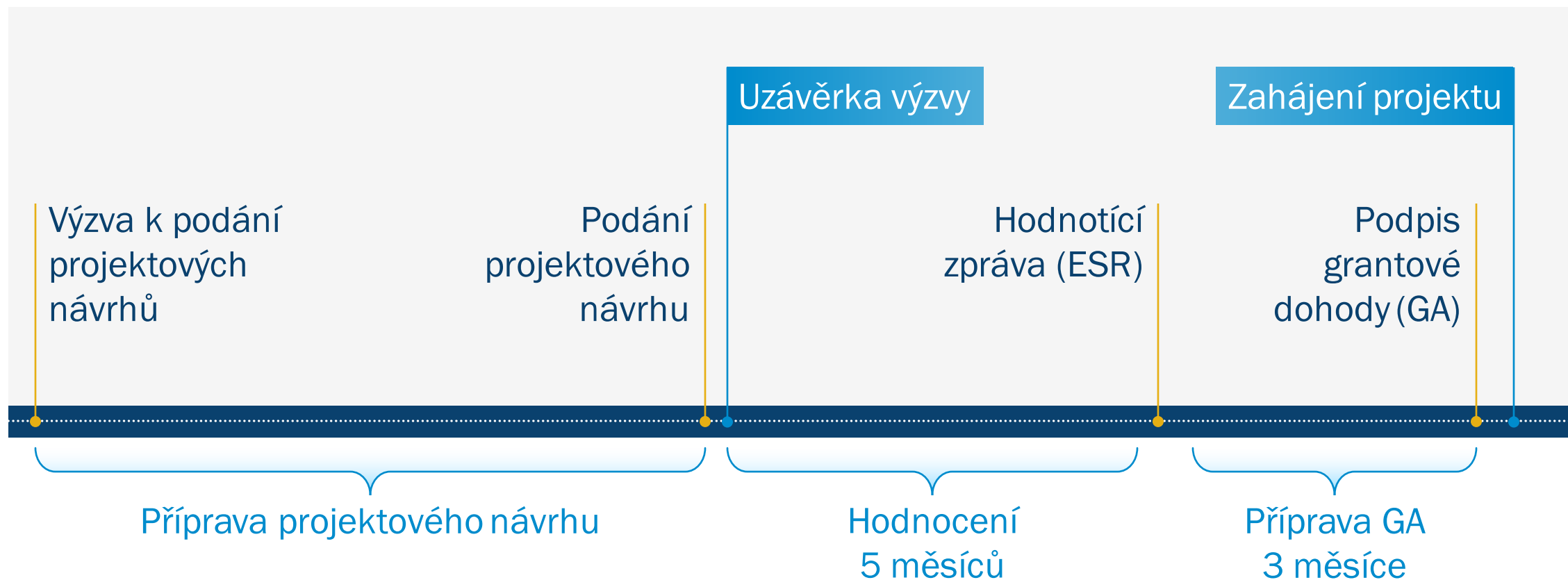
Filter

- Legislation
- Work programme & call documents
 - 2021-2022
 - 2023-2024
 - HE Main Work Programme 2023-2024
 - HE and Euratom Work Programme on Horizontal Expenditure 2023-2024
 - 1. General introduction v2.0
 - 2. Marie Skłodowska-Curie Actions
 - 3. Research Infrastructures v2.0
 - 4. Health v2.0
 - 5. Culture, creativity and inclusive society
 - 6. Civil Security for Society v2.0
 - 7. Digital, Industry and Space v2.0
 - 8. Climate, Energy and Mobility v2.0
 - 9. Food, Bioeconomy, Natural Resources, Agriculture and Environment v2.0
 - 10. European Innovation Ecosystems (EIE) v2.0
 - 11. Widening participation and strengthening the European Research Area v2.0
 - 12. Missions v2.0
 - 13. General Annexes

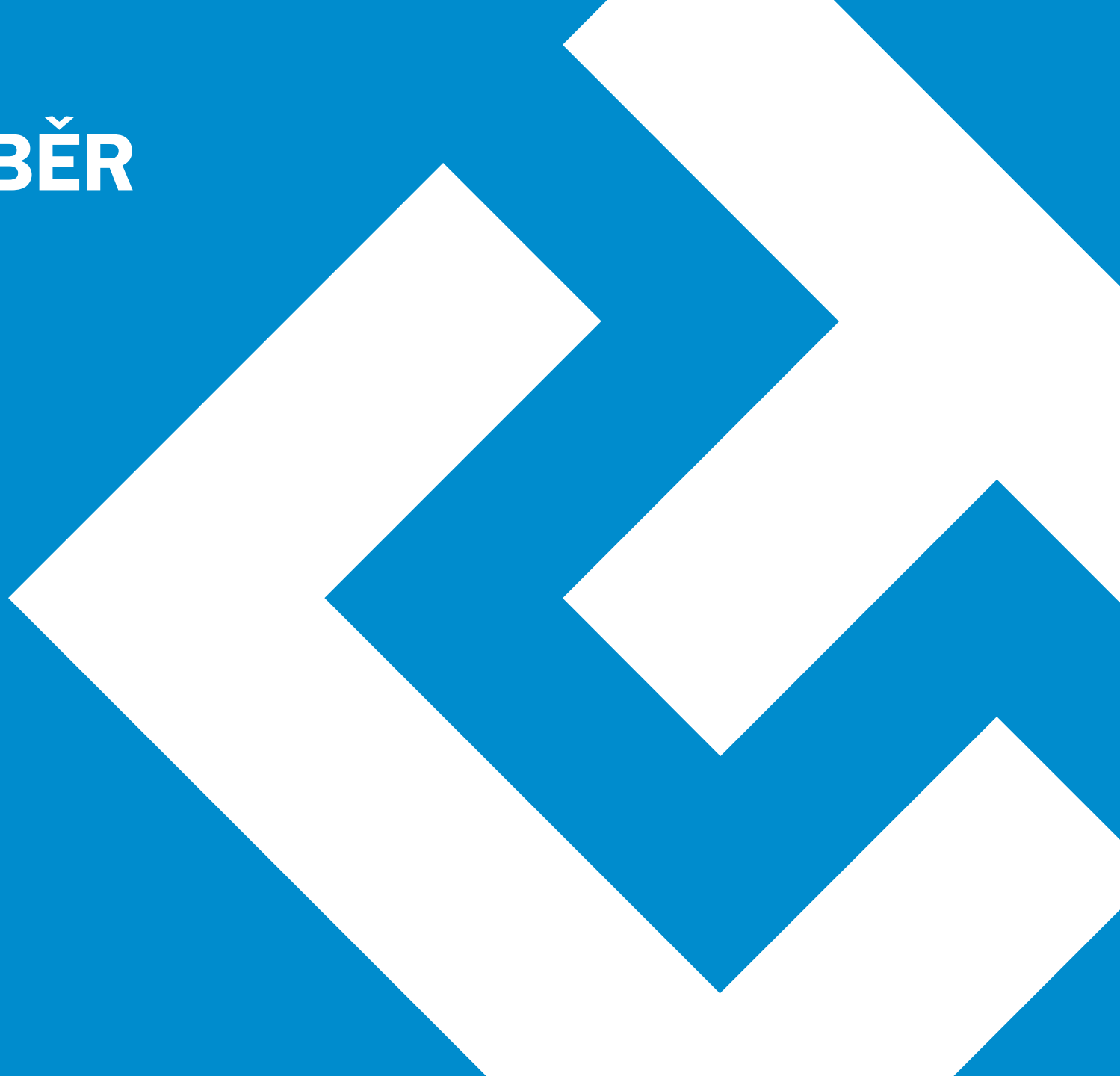
KONTEXT PROJEKTOVÝCH NÁVRHŮ

- Jde o **přímý kontakt** s Evropskou komisí a jejími agenturami.
- Není zde zprostředkující role národních grantových agentur nebo státní správy.
- Předkládání návrhů může probíhat
 - ❖ **jednokolově** (one stage procedure)
 - ❖ **dvoukolově** (two stage)
- Typy projektů
 - ❖ **RIA – výzkumná a inovační akce; spíše základní výzkum, nižší stupně TRL**
 - ❖ **IA – inovační akce; spíše aplikovaný výzkum; vyšší stupně TRL**
 - ❖ **CSA – koordinační a podpůrná akce; propojování evropského výzkumu**
 - ❖ **další typy**

ČASOVÝ RÁMEC



REGISTRACE A VÝBĚR HODNOTITELŮ



VÝZVA EK POTENCIÁLNÍM HODNOTITELŮM

https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/experts/call-for-expression-of-interest_en.pdf

- Výzva Evropské komise pro potenciální hodnotitele
- Pro celé období 2021 - 2027
- Základní informace
- Zhužtěná podoba - 10 stran
- Postup pro zájemce o činnost experta



EU Experts

Call for Expression of Interest

Funding & Tenders Portal Expert Database 2021-2027

Version 1.2
15 January 2023



Work as an expert

Need help?

The European Union Institutions appoint external experts to assist in the evaluation of grant applications, projects and tenders, and to provide opinions and advice in specific cases.



In particular, experts assist in:

- Evaluation of proposals, prize applications and tenders
- Monitoring of actions, grant agreements, public procurement contracts

In addition, experts provide opinion and advise on:

- Preparation, implementation and evaluation of EU programmes and design of policies.

In order to select experts, the European Union Institutions publish regularly calls for expression of interest (see list below) detailing the selection criteria, the required expertise, the description of the tasks, their duration and the conditions of remuneration.

Interested? Please join the database of external experts!

[Register as expert](#)

As new expert, you will be first requested to create your EU login account and register your profile.

Registered experts can update the profile via the My Expert Area after login.

News

Sep 17, 2023

[Call for applications to join the Expert group on the Economic and Societal Impact of Research and Innovation \(ESIR3\)](#)

Directorate-General for Research and Innovation (DG RTD) has published a call for applications for experts for the Economic and Societal Impact of Research and ...

Jul 24, 2023

[Short video tutorial on lump sums in Horizon Europe](#)

The Commission has just released two short videos to explain how lump sums work in Horizon Europe. The videos were created to brief experts who evaluate lump su...

All news >

Calls for expressions of interest for experts

- [Call for expressions of interest for experts \(2021-2027\)](#)
- [Calls for expressions of interest for experts \(2014-2020\)](#)

Quick Links

Contracts & remuneration

- [Model contract for evaluators](#)
- [Model contract for monitors + Code of conduct + Terms of reference](#)
- [Methodology for expert fees](#)
- [Increase in expert allowances](#)
- [Reimbursement of Eurostar tickets](#)

Work materials

- [Standard briefing slides for HE experts](#)
- [Briefing videos for HE experts](#)

Other

- [FAQ for experts](#)
- [Experts dashboard](#)
- [Lists of contracted experts](#)

- FAQs
- Helpdesk & Support Services
- Support videos**



How to evaluate Ethics aspects (additional questions)

How to evaluate Ethics aspects (additional questions) in Horizon Europe proposals



How to evaluate Dissemination, Exploitation and Communication

How to evaluate Dissemination, Exploitation and Communication in Horizon Europe proposals



How to evaluate Open Science

How to evaluate Open Science in Horizon Europe proposals



How to evaluate Social Sciences & Humanities (SSH)

How to evaluate Social Sciences and Humanities in Horizon Europe proposals



How to evaluate Strategy for Intellectual Property Management

How to evaluate the Strategy for Intellectual Property Management in Horizon Europe proposals

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/videos>

REGISTRACE EXPERTŮ DO DATABÁZE HODNOTITELŮ

- Personal details
- Contact details
- Area of expertise
- Work
- Education
- Languages
- Profile availability

REGISTRACE EXPERTŮ – DOSTUPNOST VAŠEHO PROFILU

Who can see my profile

This can be modified at anytime

Institutions I agree to work with:

- EU institutions and bodies
- Other EU Institutions (European Parliament, European Council, Court of Justice of the European Union, European Central Bank, European Investment Bank, European Court of Auditors, European Committee of the Regions, European Economic and Social Committee, ...)
- Research funding bodies with a public service mission, based in the EU/EEA countries (other than EU institutions and bodies) or in third countries, associated to Horizon 2020 or to other EU funding programmes, for which the Commission has adopted an adequacy decision
- Research funding bodies with a public service mission, which are based in third countries, associated to Horizon 2020 or to other EU funding programmes, for which the Commission has not adopted an adequacy decision¹

1. An 'adequacy decision' recognises that a third country offers data protection standards equivalent to the ones in the EU/EEA countries. In principle, the transfer of personal data to non-adequate third countries is much more risky compared to EU/EEA countries and adequate third countries. Therefore, given the risks, in the absence of an "adequacy decision", your data may be transferred to a third country if you have provided your explicit consent

I agree to work on :

- All programmes and sub-programmes of the above selected EU and non-EU institutions.

If you are contacted for tasks that are beyond your competences, you can always decline to work on these tasks with no further consequences.

Save & Close



- My Expert Area
- Dashboard
- Personal Data
- CV
- Bank Account
- Contracts and Invitations
- Payments
- Help



Your profile is 80% complete

Only experts with complete profiles are contracted. Complete all sections to increase your visibility.

[Delegations](#)

Active Tasks (0)

You have no tasks at the moment

Contracts and Invitations

You have no contracts or invitations at the moment.

Payments

You have no payments at the moment.

Profile

Personal data ✓	CV ✓	Expertise ✗
Current Employment ✓	Education ✓	Languages ✓
Data Protection ✓ <small>Who can see my profile</small>	Publications	Additional information

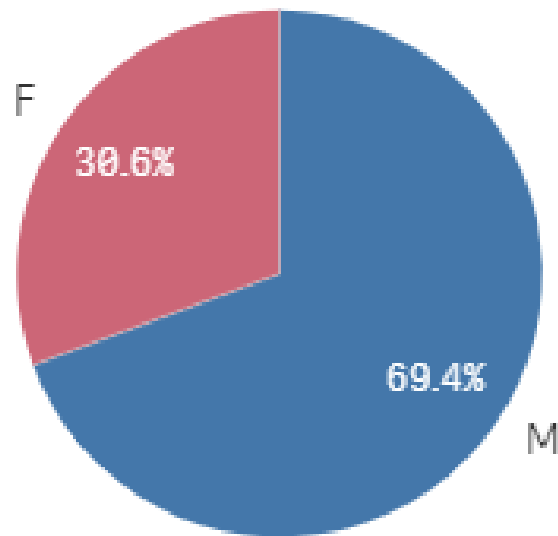
Adding details to your profile

VÝBĚR EXPERTŮ



- Skills, experience and knowledge
- Geographical diversity and gender (at least 40% of the under – represented sex)
- Private - Public sector balance
- Rotation: max number of days paid in consequent years
- Newcomers - at least 25% newcomers for each call
- Expertise – most important aspect; Specialist vs Generalist
- Number of proposals can vary

HODNOTITELÉ Z ČR - DASHBOARD



- Počet všech expertů v databázi (k 30. 10. 2023): 243 268
- Počet CZ expertů v databázi: 2 298 (<1 %)
- Počet kontrahovaných CZ expertů: 615
- Pouze počty, nikoli jména
- [External expert dashboard](#)

Jména kontrahovaných hodnotitelů v Horizontu Evropa – [Expert List 2022](#)

Jména kontrahovaných hodnotitelů v H2020 – [Expert List 2020](#)

EXPERTI – HLAVNÍ ZÁSADY

- Nezávislost
- Nestrannost
- Objektivnost
- Přesnost
- Konzistence

DOBRY EXPERT

- Timely in delivering reports and during consensus meetings
- In case of problem informs ON TIME
- Reliable
- Flexible
- Able and willing to learn and accept European Commission process
- Written and spoken English of good quality
- Able to judge and evaluate the project, not to copy/paste
- If comments are negative – WHY?
- If comments are positive – WHY?

ZACHOVÁNÍ MLČENLIVOSTI



The evaluator must:

- Not discuss evaluation matters
- Not contact partners
- Not disclose names
- Maintain confidentiality of documents

**„WE DO NOT LOOK FOR
EXPERT-SUPERMAN,
EVERYBODY CAN LEARN IT...“
EC**



HODNOTICÍ PROCES

—
IVA WALTEROVÁ



PŘESTÁVKA 5 MINUT






SLIDO ANKETA

*„Jaké jsou Vaše největší obavy
z hodnocení projektů Horizontu Evropa?“*

HODNOTÍCÍ ZPRÁVA (EVALUATION REPORT - ER)



UKÁZKA HODNOTÍČÍ ZPRÁVY

Proposal Evaluation Form						
	EUROPEAN COMMISSION Horizon Europe (HORIZON)	Evaluation Summary Report Research and innovation actions				
Call:	HORIZON-CL4-2023-HUMAN-01					
Type of action:	HORIZON-RIA					
Proposal number:						
Proposal acronym:						
Duration (months):						
Proposal title:						
Activity:						
N.	Proposer name	Country	Total Cost	%	Grant Requested	%
1						
2						
3						
4						
5						
6						
7						

Abstract:

Evaluation Summary Report

Evaluation Result

Total score: (Threshold: 10)

Criterion 1 - Excellence

Score: Threshold: 3/5.00 , Weight: -)

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Clarity and pertinence of the project's objectives, and the extent to which the proposed work is ambitious and goes beyond the state of the art.
- Soundness of the proposed methodology, including the underlying concepts, models, assumptions, inter-disciplinary approaches, appropriate consideration of the gender dimension in research and innovation content, and the quality of open science practices, including sharing and management of research outputs and engagement of citizens, civil society and end users where appropriate.

Criterion 2 - Impact

Score: (Threshold: 3/5.00 , Weight: -)

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions from the project.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities.

Criterion 3 - Quality and efficiency of the implementation

Score: (Threshold: 3/5.00 , Weight: -)

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall.
- Capacity and role of each participant, and the extent to which the consortium as a whole brings together the necessary expertise.

Scope of the application

Status:

Comments (in case the proposal is out of scope)

Not provided

Exceptional funding

Use of human embryonic stem cells (hESC)

Status:

If YES, please state whether the use of hESC is, or is not, in your opinion, necessary to achieve the scientific objectives of the proposal and the reasons why. Alternatively, please state if it cannot be assessed whether the use of hESC is necessary or not, because of a lack of information.

Not provided

Use of human embryos

Status:

If YES, please explain how the human embryos will be used in the project.

Activities excluded from funding

Do no significant harm principle

Exclusive focus on civil applications

Artificial Intelligence

Overall comments

Status: **No**

If YES, please explain.

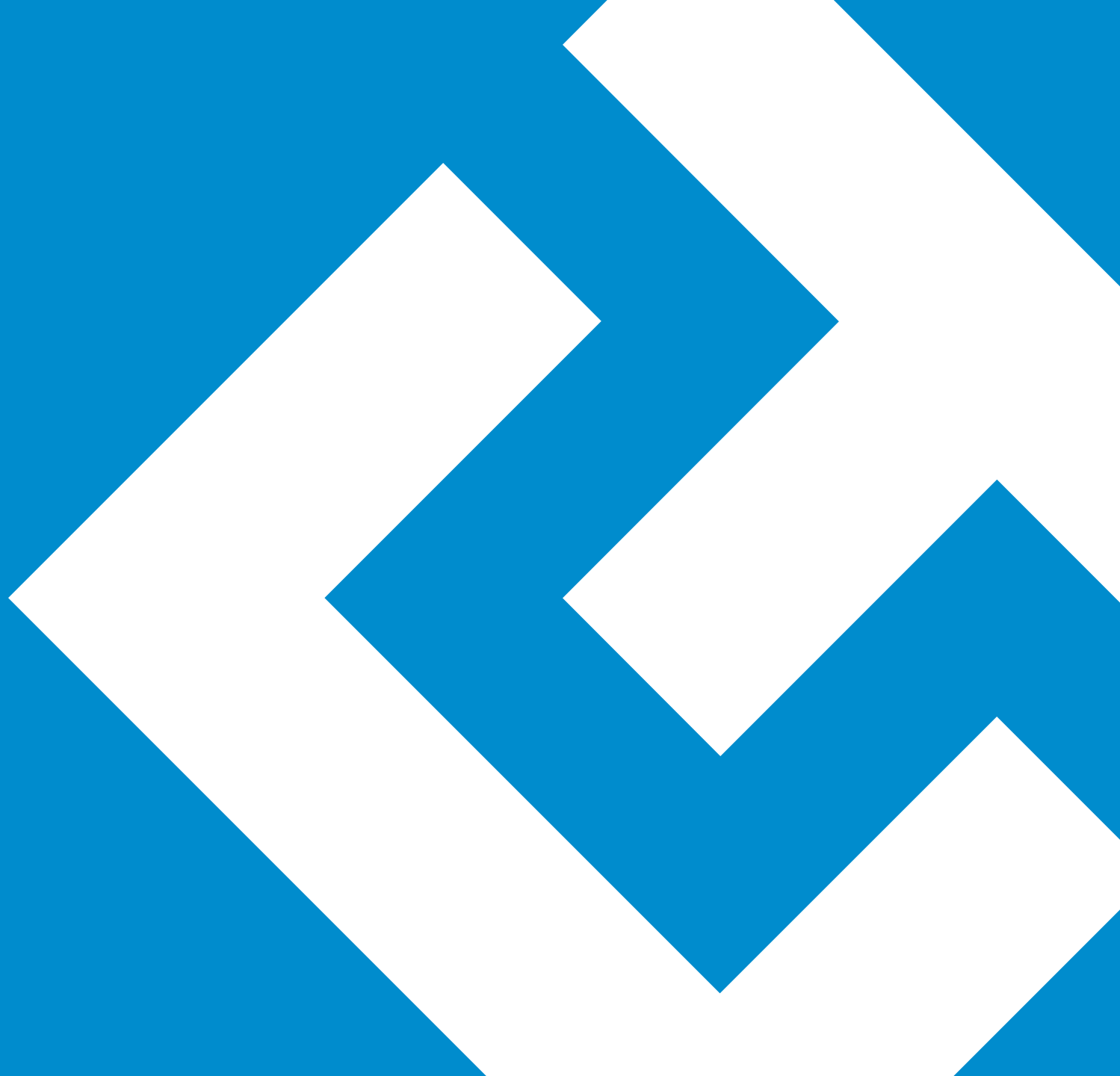
Not provided



SLIDO CVIČENÍ

*JAK FORMULOVAT TEXTY KOMENTÁŘŮ
V HODNOTÍCÍ ZPRÁVĚ*

**PRAVIDLA
ODMĚŇOVÁNÍ
HODNOTITELŮ**



PRAVIDLA ODMĚŇOVÁNÍ HODNOTITELŮ (1)

- [Expert Model Contract](#)
- [Model Contract for Experts](#) – pro evaluátory, monitory, členy expertních skupin
- [Code of Conduct](#) - Etický kodex hodnotitele
- [Terms of reference](#) - Doplnující informace



PRAVIDLA ODMĚŇOVÁNÍ HODNOTITELŮ (2)

- Metodika pro stanovení sazeb pro experty při hodnocení na dálku:
https://ec.europa.eu/research/participants/data/ref/h2020/other/experts_manual/methodology-for-expert-fees_en.pdf
- Tabulky činností
- Na jednu jednotku práce připadá 45 €
- 10 jednotek odpovídá pracovnímu dni, tj. částce 450 €
- Úkoly a platby pro jednotlivé experty jsou stanoveny předem

KONFLIKT ZÁJMŮ

- **Conflict of interest** - *Model Contract for Experts, version 2.1, 11 January 2022; ANNEX 1:*

Situace automaticky považované za konflikt zájmů:

- Podíl na přípravě projektu
 - Monitorování projektu by expertovi přineslo prospěch/nevýhodu
 - Úzké rodinné vazby nebo jiné úzké osobní vztahy s osobami (včetně třetích stran) zapojenými do projektu
 - Expert je nadřízený, kurátor nebo partner žadatele, nebo je v managementu žadatele (nebo třetích stran)
 - Expert je zaměstnán jednou ze stran zapojených do návrhu projektu (nebo třetími stranami)
-
- **Conflict of interest**
 - V případě konfliktu zájmů je expert z hodnocení vyloučen (**Exclusion**)
 - Expert musí zachovat důvěrnost informací (**Confidentiality**)

INFORMAČNÍ ZDROJE



Oblast pro experty

- Výzva EK pro potenciální hodnotitele k registraci do databáze expertů, [link](#)
- Standardní instruktážní prezentace pro hodnotitele, [link](#)
- Často kladené otázky hodnotitelů – FAQ, [link](#)
- Formulář pro evaluaci projektů RIA/IA, [link](#)
- Modelová smlouva pro hodnotitele, [link](#)
- Video „Being an expert for the EC“, [link](#)
- Videá a prezentace o hodnocení projektů, síť národních kontaktů „Idealist“, [link](#)
- Přehled českých hodnotitelů, [link](#)

Oblast pro navrhovatele

- Uživatelská příručka E. Komise pro online předkládání projektových návrhů, [link](#)
- Série čtyř videí Evropské komise pro navrhovatele projektů Horizontu Evropa, linky [1](#), [2](#), [3](#), [4](#)
- Český slovník s terminologií v Horizontu Evropa, [link](#)
- Šablona pro projektový návrh RIA, IA [link](#)
- Průvodce pro vyplňování šablony RIA, IA s doporučeními evaluátorů [link](#)
- Národní portál www.HorizontEvropa.cz
- Podcast s Ivou Walterovou [link](#)



ČAS NA POSLEDNÍ DOTAZY

A NA ZÁVĚREČNOU SLIDO ANKETU



DĚKUJEME VÁM ZA POZORNOST

Iva Walterová, hodnotitelka, CEO v EPMA, z.s.p.o.

Lenka Švejcarová, TC Praha – oddělení NICER

vejcarova@tc.cz

<https://horizontevropa.cz/cs/narodni-kontakty>