



HORIZON EUROPE

THE EU RESEARCH & INNOVATION PROGRAMME

2021 – 2027

Tips and updates for applicants
26th March 2026

All call documents are on the Funding & Tenders Portal

Horizon Europe Cluster 2 Work Programme

- Background, topics and budgets for 2026 and 2027

General Annexes

- List of eligible countries, eligibility and admissibility conditions, award criteria and procedure, scoring and threshold

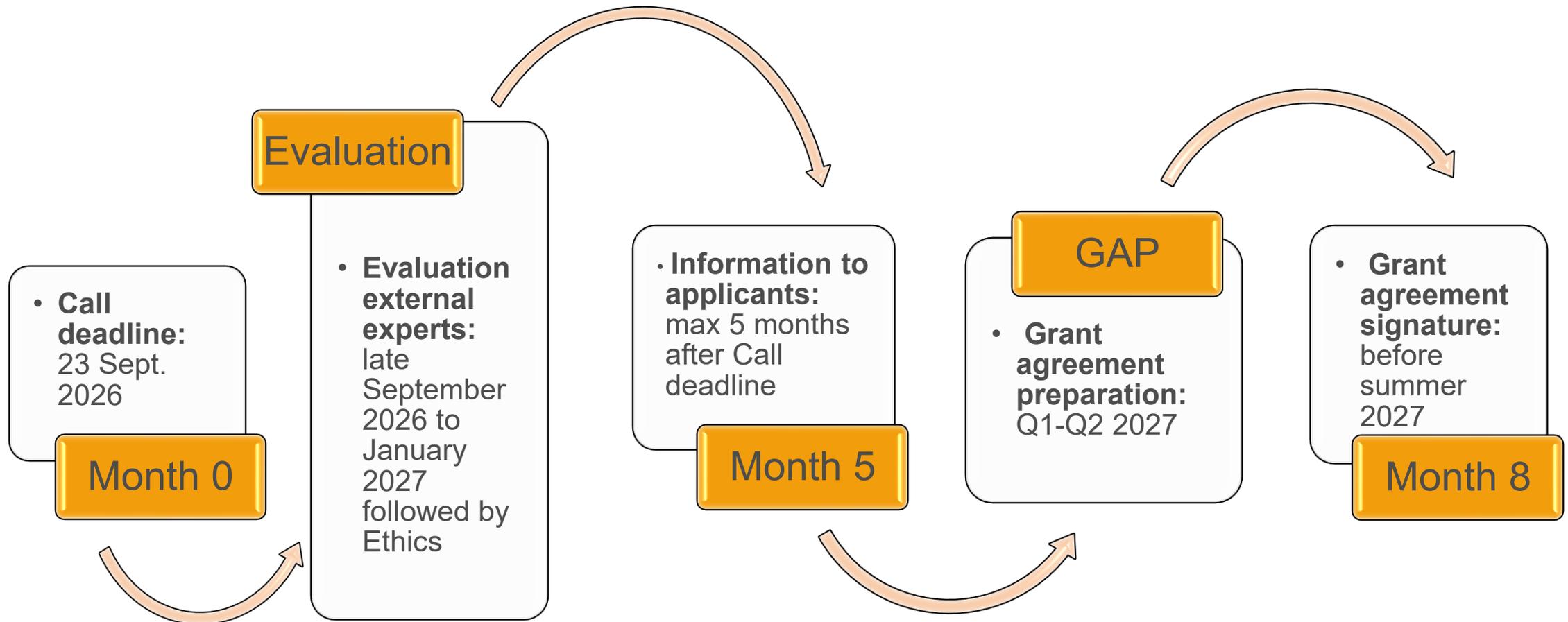
Submissions forms and templates

- Essential forms and guides to draft and submit your proposal (see specific topic page and the submission system)

Horizon Europe Programme Guide

- Informs applicants about the specificities of the programme

Timeline



Call Horizon-CL2-2026-1 - Topic pages

Get familiar with the topic details including:

Topic description, which includes

- **Scope**
- **Expected outcome** of the topic in relation to the expected impact of the destination

Pay attention to the **language**: e.g. are proposals expected to cover one or all aspects listed?

*Are there any **mandatory elements** (mentioned with “should”) e.g. method to consider, stakeholder groups to involve, regional focus, previous results to build upon?*

Pay attention to each sentence of the topic description!

Call Horizon-CL2-2026-1 – Topic descriptions

- **Are there any legal or financial constraints listed under the topic conditions tab?** E.g.
 - Type of action? (Research & Innovation – RIA, Innovation Action – IA, Coordination and Support Action – CSA)
 - Lump sum payment?
 - Financial support to third parties?
- What are the general and/or topic specific **eligibility/admissibility** conditions?
 - E.g. specific consortium composition, mandatory information?
- Do you have the latest **proposal templates from the submission system**?
- Do you have third country participants? Read the **Horizon guidance, country-related funding guide**.
- ⁵ Do you know how your proposal will be evaluated? Check the updated **evaluation template!**

Tips for planning

- Check the **budget of the topic** under the [BUDGET](#) tab of the topic page. It gives you the expected EU contribution per project, and the **number of projects to be funded**.
- Check the **success rate of previous calls** – in the call update section of the previous calls published on the Portal.
- Get the **commitment** of your institution in time!
- **Start planning** your work plan, resources and budget well in time for the **detailed budget table!** Check the formal requirements/template.
- Check **previously funded EU projects** on the [Projects & Results page](#) of the Portal, or on CORDIS.
- **Resubmitting proposals:** It is possible to resubmit a previously unsuccessful proposal. But, check the new templates, the new topic and modify your proposal according to these new requirements.

Building a consortium

Do you need to look for new partners to build your consortium or do you want to join a consortium?

- Participate in **brokerage events** or online brokerage platforms
- Reach out to **National Contact Points** for national opportunities
- Use the **Partner Search** database of the Portal

keyword-based search, per country, organisation/person, active users/not

- Are you looking for expertise or offer expertise? Post a partner search ad on the topic page `**Partner search announcements**` section and make the first contact.

National Contact Points for Horizon Europe

National Contact Points (NCPs) are available in each Member State/Associated Country and in many third countries. They are responsible for one or more Work Programme parts of Horizon Europe. As the NCPs are national structures, the type and level of services offered may differ from country to country.

They offer:

- Guidance on choosing relevant Horizon Europe topics and types of action
- Advice on administrative procedures and contractual issues
- Training and assistance on proposal writing
- Distribution of documentation (forms, guidelines, manuals etc.)
- Assistance in partner search

NET4SOCIETYHE project: the project of Cluster 2 NCPs; the website offers additional guidance, selection of [opportunities for SSH research](#) outside Cluster 2 in Horizon,

[Online brokerage platform](#) for applicants to look for partners, operated by the NCPs.

Topics
identification

Consortium
creation

Proposal
preparation

Proposal
review

Submission

Novelties in 2026 calls

[Watch the webinar](#)

Modified, simplified proposal and evaluation templates:

Simplification of the **impact section**, section 2.1:

- No need to explain the general scientific, economic and societal impacts
- The project`s pathways to impact section no longer has to provide a detailed indication of the scale and significance of the project`s contributions – quantified estimates should be provided only when possible and relevant
- Optional overview of the impact

Implementation section of the proposal:

- Tables 3.1 h (except equipment), i, j are no longer needed in the Part B
- In lump sum proposals the **detailed budget table** should contain additional details for the budget categories

New page limits for the Part B of the proposals

- **RIA/IA lump sum – 45 pages, CSA – 28 pages**



Application form - proposal template

The call specific application template is available from the submission system!

The proposal contains 3 mandatory parts for lump sum calls:

- **Part A** consists of **web-based forms** generated by the IT system. It is based on the information entered by the participants through the submission system in the Funding & Tenders Portal. Check out the extended Part A information in advance (especially related to the **Participants` data**).
- **Part B** is the **narrative part with a page limit** that includes three sections that each correspond to an evaluation criterion. Part B needs to be uploaded as a **PDF** document on the basis of the templates downloaded by the applicants in the submission system for the specific call or topic.
*Check the requirements of the **page limit and font type, margins described in the template!***
- **Lump sum proposals: mandatory detailed budget table** with the distribution per Work Package /Partner/cost type.
- **Reimbursement ceiling for Innovation Actions: 70% or 100%** depending on the organisation type (profit or non-profit) – adjust it in the detailed budget table!



Proposal submission in practice

- The coordinator creates the draft proposal starting from the Topic page on the Funding and Tenders Portal, after choosing the type of action.
- **Partners** will be invited by the coordinator, using the contact persons e-mail address.
- The **coordinator** can edit all sections, while the participants can edit only their own section. Uploading Part B, inviting participants and submitting the proposal is reserved for the coordinator.
- Make sure to **leave sufficient time to prepare the extended Part A** information, not to miss any information that is essential for the evaluation, e.g. researchers participating, experience, publications.
- **Submit the first version as early as possible**, not later than 48 hours before the deadline to avoid any technical issues. Any new submission overwrites the previous version.

General information

Topic description

Destination

Conditions and documents

Partner search

Submission service

Topic related FAQ

Get support

Call updates

Submission system



Participants

Deadline
07 October 2021 17:00:00 Brussels Local Time

Call data:
Call: HORIZON-CL2-2021-TRANSFORMATIONS-01
Topic: HORIZON-CL2-2021-TRANSFORMATIONS-01-05
Type of action: HORIZON-RIA
Type of MGA: HORIZON-AG

Topic and type of action can only be changed by creating a new proposal.

In this step you as coordinator should manage and review the participants of your proposal.
Only you as coordinator can edit the elements on this screen.
Note: Your changes will be applied only after you click the "Save Changes" button.

Call requires at least 3 participant(s) from different EU Member states/Associated Countries

Specific eligibility rules apply within the call, especially for topic TRANSFORMATIONS-01-07, please read the "Other eligibility conditions" that are published on the topic page.

Number of participants: 1

Coordinator
1 Test - Hegyvarine Nagy Agnes
Test - Hegyvarine Nagy Agnes
Brussels, BE
PIC: 954905831

Add Affiliated Entity +

Contacts: 0 **Add contact** +
Agnese HEGYVARINE NAGY - Main contact >

Change organisation **Contact organisation**

Add Partner + **Add Associated partner** +

SAVE SAVE AND GO TO NEXT STEP NEXT

Call specific Part B and other templates

Download Part B templates
Download part B templates

Support & Helpdesk

Online Manual IT How To
IT Helpdesk FAQ

Service Desk:
EC-FUNDING-TENDER-SERVICE-DESK@ec.europa.eu

Download templates
Check the available IT guidance

Eligibility warnings:
For more information, refer to the topic page for the precise eligibility rules!

Affiliated entity:
Linked to a participant with related tasks and budget. No contacts to be added.

Associated partner:
To be added to the proposal, cannot fill in budget table. No contacts to be added. See definition in the WP General Annex.

Specific conditions in Cluster 2 calls

All topics of the Horizon-2026-01 call use lump sum funding

Mandatory information for all proposals: detailed budget table applicable to the call!

Detailed budget figures are needed per **work package, participant and cost type with resource needs**, etc.

Lump sum related information for HORIZON calls:

- Detailed guidance for applicants and experts, Information on reporting for projects
- Webinars with the latest information, Q&A of applicants
- Dashboard of personnel cost used by experts

Use the detailed budget table from the submission system from the topic page!

- **Innovation Actions:** adjust the reimbursement rate in the table per participant!
- Use the comment section for additional explanations!
- Provide consistent data with the other parts of the proposal!

Specific call conditions - examples

In addition to the standard admissibility/eligibility requirements that are related to a type of action, some topics **have additional eligibility requirements**, here some examples:

- **consortium`s composition** in terms of regions (Topic: HORIZON-CL2-2026-01-DEMOCRACY-04)
- related to **the participation of certain type of participants**, e.g. related to the experience/work of the participant (Topics: HORIZON-CL2-2026-01-Heritage-05, HORIZON-CL2-2026-01-HERITAGE-07)
- **Financial support to third parties** (HORIZON-CL2-2026-01-HERITAGE-01, HORIZON-CL2-2026-01-HERITAGE-02, HORIZON-CL2-2026-01-HERITAGE-03, HORIZON-CL2-2026-01-HERITAGE-06, HORIZON-CL2-2026-01-HERITAGE-07) – fill in additional annex!
- **JRC participation** (HORIZON-CL2-2026-01-DEMOCRACY-03, DEMOCRACY-08, DEMOCRACY-10, HORIZON-CL2-2026-01-HERITAGE-01, HORIZON-CL2-2026-01-TRANSFO-06, TRANSFO-08, TRANSFO-09)
- Separate **thematic scopes** that applicants need to choose from within a topic (HERITAGE 02 and DEMOCRACY 06)
- Participation of **security practitioners** (HORIZON-CL2-2026-01-HERITAGE-07) – fill in additional annex!

See exact wording in the Work Programme or Topic pages. Make sure to provide sufficient information in the proposal to prove the eligibility of your consortium and proposal!

Financial support to third parties/cascade funding

Some topics allow for the use of [financial support to third parties](#)

- Such support is optional, if necessary e.g. for the implementation/impact of the project.
- If used in the project, applicants have to upload an **additional annex with the cascade funding details**. In parallel, applicants should also add the financial details to the lump sum **detailed budget table**. See related [guidance](#)

JRC participation

The Joint Research Centre (JRC) may participate as member of the consortium selected for funding as a beneficiary with zero funding, or as an associated partner. The JRC will not participate in the preparation and submission of the proposal - see General Annex B.

See useful [FAQ about the participation of JRC](#)

ETHICS – PROPOSAL STAGE – GET READY!

1. Use the right proposal template and follow the instructions for filling Section 4 the “Ethics issues table” and your “Ethics Self Assessment”

2. Get familiar with the How To Complete you Ethics Self Assessment Guide



Should you spot the need, go back to your proposal Part B and integrate the missing ethics-relevant information, under relevant sections (methodology, WP tables, etc.)

The image shows a table titled 'ETHICS ISSUES TABLE' with columns for 'ETHICS ISSUES IDENTIFIED', 'RELEVANT ETHICS ISSUES IDENTIFIED', and 'COMPLIANCE WITH ETHICAL PRINCIPLES AND RELEVANT LEGISLATIONS'. The table contains several rows of questions related to human embryonic stem cells and human embryos, with 'Yes' and 'No' columns for each question.The image shows a form titled 'Ethical dimension of the objectives, methodology and likely impact'. It contains sections for 'Ethical dimension of the objectives, methodology and likely impact' and 'Compliance with ethical principles and relevant legislations'. The form includes instructions and a list of questions to be answered.

“Ethics Self Assessment”: a Character limit of 5,000 applies (per box)

The resources necessary to comply with ethics may be added to the Work Packages that give rise to the underlying ethics issues, or to the Management WP. An “Ethics Compliance” task may be added to that WP.

ETHICS – PROPOSAL STAGE – PRACTICAL TIPS!

Ethics issues table - Remember:

✓ Tick “**yes**” on an element when you believe the proposal raises Ethics Issues on that specific element, independently from the fact you believe you have successfully tackled that element in the proposal!

✓ Tick “**no**” on an element when you believe the proposal does not raise ethics issues

What **does not** work:

✓ Ticking “no” on a specific element, because the proposal raises that specific issue, but you have successfully tackled it in the proposal

→ A complete, thorough Table and self-assessment will support a more accurate screening of your proposal and potentially result in less requirements!

☞ e.g.: consider for example the potential budgetary impact of a non-planned Ethics Advisor coming as an Ethics Requirement!

Proposal evaluation

- Following an eligibility/admissibility check, **experts** will be required to assess the proposals following the **evaluation template applicable to the call/topic and type of action**.
- **Evaluation scores** will be awarded **for the criteria**, and not for the different aspects listed in the table. For full applications, **each criterion will be scored out of 5**. The **threshold for individual criteria** will be 3. The **overall threshold**, applying to the sum of the three individual scores, will be 10.
- To determine the ranking for '**Innovation actions**', the score for 'Impact' will be given a weight of 1.5.
- Proposals that pass the individual threshold AND the overall threshold will be considered for funding, within the limits of the available call budget. Other proposals will be rejected.
- Proposals that are above threshold will be **ranked according to their scores** (considering the weighting for Innovation Actions), then additional aspects might be considered, if the call conditions foresee it. Proposals with the same scores follow the ranking process described in the general annexes of the HE work programme, unless the call conditions foresee otherwise.

Ranking of proposals with a portfolio approach

In 2 topics (HERITAGE 02 and DEMOCRACY 06), the ranking will be based upon a portfolio approach:

- **applicants will have to indicate the thematic area/scope they target with their proposals;**
- Experts will evaluate the proposals as usual
- During the ranking process, starting from the highest ranked proposals, experts will have to consider in addition to the score, the scope/thematic area of the proposals, making sure that they are equally covered.

In other topics the ranking of proposals will follow the one described in the [General Annex of the WP.](#)

Ranking of proposals with equal score

For each group of proposals with the same score, starting with the group achieving the highest score and continuing in descending order:

- 1) Proposals that address aspects of the call that have not otherwise been covered by more highly ranked proposals will be considered to have the highest priority.
- 2) The proposals identified under 1), if any, will themselves be prioritised according to the **scores** they have been awarded for '**Excellence**'. When these scores are equal, priority will be based on scores for '**Impact**'. In the case of 'Innovation actions', priority will be given to the score for 'Impact', followed by that for 'Excellence'.
- 3) If necessary, the **gender balance among the researchers with a leading role named in the researchers table in the proposal**, will be used as a factor for prioritisation.
- 4) If necessary, any further prioritisation will be based on **geographical diversity**, defined as the number of Member States or Associated Countries represented in the proposal, not otherwise receiving funds from projects higher up the ranking list (and if equal in number, then by budget).
- 5) If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors related to the objectives of the call, or to Horizon Europe in general. These may include, for example, enhancing the quality of the project portfolio through synergies between projects or, where relevant and feasible, involving SMEs. These factors will be documented in the panel report.
- 6) The method described in 1), 2), 3) and 4) will then be applied to the remaining equally ranked proposals in the group.

Additional guidance

- [IT HOW TO](#) for **step-by-step guidance related to the IT tools** that are available from the Portal.

- **Topic Q&A**

Check the topic pages for any **topic specific Q&A**

- [FAQs](#) on the Portal are generic

- [IT Helpdesk](#)

Before contacting the [IT Helpdesk](#), please check the available IT guidance and/or FAQs!

- **Research Enquiry Service (RES)**

Contact the [Research Enquiry Service](#) for call-related questions

- **Videos and webinars**

Watch [Videos](#) about the procedures, evaluation details, use of the Portal

Check for [webinars](#) for more guidance on the Events page of the Portal

To summarize our tips

Optimise the time available to prepare the proposal

- Last minute preparations are often reflected in a lower quality which largely reduces the chances of success
- Download the templates from the submission system
- Start a draft early + submit on time, check the uploaded annexes



Completeness

- One section missing could make your proposal inadmissible or result in a lower score
- Address each Part A section and all sub-criterion in the Part B
- Experts must check the detailed budget table`s details – be precise and consistent

Be clear and explicit

- Evaluators must judge only what they read and not on the proposal potential. They have limited time

Consortium

- Check the type of action to meet the minimum eligibility requirements when preparing the partnership
- Check topic-specific eligibility conditions and requirements

Register to work as an expert

Do you have an extensive professional experience & proven domain-knowledge?

We need experts for:

- Assessing applications for EU funding (including prizes and tenders),
- Monitoring of EU funded projects and contracts,
- Giving your advice on specific issues.



Experts act in their individual capacity to assist the EU services with the implementation of EU funding & tenders managed through the Portal.

REGISTER – and complete your profile with your experience, publications, languages, etc. and provide keywords that can help us match your expertise with the proposals to be evaluated!



Thank you!

HorizonEU

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