

Eurostars guidelines for remote experts

This document provides experts with instructions on how to assess a Eurostars application. Eurostars is part of the European Partnership on Innovative SMEs. The [partnership is co-funded by the European Union through Horizon Europe](#).

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These guidelines are informative only. They merely serve as explanations provided by the Eureka Secretariat to guide applicants/experts through the Eurostars processes. They do not create any rights and obligations. The Eureka Association AISBL assumes no responsibility or liability for any errors or omissions in the content of the guidelines. The information contained in these guidelines is provided on an "as is" basis with no guarantees of completeness, accuracy or usefulness.

HISTORY OF CHANGES		
Version	Publication date	Changes
Original version	April 2022	
Version 2	July 2022	<p>p. 13 - 14, changes to paragraphs <i>Confidentiality</i> and <i>Information Security</i>.</p> <p>p. 9 and 10, the following sentence has been added: "Please note: Eurostars promotes close-to-market research. Commercialisation should be planned to start rapidly after the end of the project. For biotechnology, biomedical and medical projects, commercialisation or clinical trials should be planned to start rapidly after the end of the project."</p>
Version 2.1	February 2023	<p>p. 8, paragraph 3. Realistic and clearly defined project management and planning: new terminology added ("milestones" and "results").</p> <p>p. 10, paragraphs 4. Clear and realistic commercialization plans and 5. Economic, Environmental, and Societal Impact: new terminology added ("results," "outcomes" and "impacts").</p> <p>p. 12, paragraph 4. Technical achievability & risk: new terminology added ("results").</p>
Version 2.2	March 2023	<p>Paragraph "Expert selection and deadlines" expanded with further details.</p> <p>History of Changes, Version 2.1, change on pp 6-7 removed.</p>
Version 2.3	September 2023	<p>p. 14 "Please be informed that your name and your technical area might be published on our website".</p>

Your role as a remote expert

We expect you to perform an excellent job.

The functioning of Eurostars is entirely dependent on the evaluations performed by our remote experts. That is why we expect our remote experts to perform an excellent job.

Each application is first evaluated by three remote experts who work individually. Applications that receive a score above a set quality threshold progress further, while those that do not are rejected. Successful applications are then checked by the Independent Evaluation Panel, that ranks them in order of quality and recommends the best proposals for funding.

An expert uses their technical and market expertise within their specialist field to provide objective assessments consisting of scores and justifications. Eurostars pays particular attention to the application of technology to produce marketable products, processes, and services. The marketing strategy of projects is considered as important as the degree of innovation and the technical merits. It is therefore vital that you, the expert, have an excellent understanding of dissemination strategies, market areas and routes to those markets.

Your assessment must be in line with Eurostars principles.

Eurostars principles are reflected in the [eligibility criteria](#). Knowing the eligibility criteria is a pre-condition for commencing your work.

Remember that Eurostars' mission is to boost collaboration on international R&D&I projects among different types of organisations from different countries in the world. Eurostars is not exclusive to Europe. Organisations from anywhere in the world are welcome to join – as long as the consortium meets all eligibility criteria. As a remote expert, you must be aware of this principle and make sure your assessment is in line with it.

Your assessments must be objective, coherent and useful.

Each score you give must be clearly justified in the corresponding comment. You need to be able to identify the strengths and weaknesses of a project and explain why you consider an element as a strength or a weakness.

Your justifications will be used to provide feedback to the applicants. Do not be afraid to be honest and express constructive criticism, but you must not be dismissive or rude.

We expect you to follow our code of practice.

- You will evaluate applications independently.
- You will evaluate applications objectively and without prejudice.
- Your assessment will be in line with Eurostars principles.
- You will give sufficient time and effort to the process.
- You will provide accurate scores using the entirety of the scale available. You will be required to evaluate the proposals against three main criteria and their sub-criteria. You
- will have to rate each sub-criterion by using a scale from 1 to 6, where 1 is the lowest score and 6 is the highest score.

- You will clearly justify each score that you provide. You will provide statements which are specific to the application at hand. Not vague, generic or formulaic answers taken from this document, other Eurostars guidelines, or readily available information sources (e.g., Wikipedia). Statements and scores will not be contradictory to one another.
- You will uphold the confidential nature of the application.



If you fall short of our expectations, you will be asked to repeat the work. If you continue to produce unsatisfactory work, we reserve the right to suspend any payment or financial compensation.

You must immediately inform us about any (potential) conflict of interest.

A conflict of interest undermines everything that we are trying to achieve. We need you to openly and honestly inform us if there is any reason that you cannot or might not be able to perform an objective evaluation.

Experts who inform us of such an issue will be unable to evaluate applications during that period but will be welcome to participate again in the future.

Occasionally, it is not clear that a conflict exists until after the initial invitation. Do not worry – if you inform us as soon as you are aware of the fact, we can take steps to correct this.

However, we have a zero-tolerance approach to individuals who fail to declare a conflict which we later discover:


- You will be excluded from working for Eurostars or Eureka in the future.
- We will seek reimbursement of all fees paid to you for your work.
- We will inform the Ministries in the affected countries.
- We will inform the European Commission and its Executive Agencies, and those responsible for managing their expert evaluation processes.

If you discover that your assigned application raises a conflict of interest, you are under the obligation to declare this to the Eureka Secretariat immediately.

If you have any doubts, email us immediately at experts@eurostars-eureka.eu with subject “question regarding conflict of interest.”

Types of conflict of interest:

DISQUALIFYING: THE EXPERT	POTENTIALLY DISQUALIFYING: THE EXPERT
> was involved in the preparation of an application;	> was employed by one of the applicant legal entities in an application within the previous two years;
> stands to benefit directly should an application be accepted;	> is employed by one of the Eureka NPC or funding bodies;

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- | | |
|--|---|
| <ul style="list-style-type: none"> > has a close or other family relationship with any person representing an applicant legal entity in the applications; > is a director, trustee or partner of an applicant legal entity, or is affiliated with them in any other way > is employed by one of the applicant legal entities in the applications; > is in any other situation that compromises his/her ability to evaluate the applications objectively. | <ul style="list-style-type: none"> > is involved in the management or coordination of one or more of the Eureka initiatives; > is involved in a contract or research collaboration with an applicant legal entity, or had been so in the previous two years; > is in any other situation that could cast doubt on his/her ability to evaluate the applications impartially, or that could reasonably appear to do so in the eyes of an external third party. > other circumstances which may arise but are not specifically listed above. |
|--|---|

Your role is not to...

...assess the financial capacity of the project partners to support their project costs.

This task can only be performed by the Eurostars National Funding Bodies (NFBs) as part of the Legal and Financial Viability check. The NFBs base their assessment of the financial capacity of the participating organisations on data which is only available to the competent national authorities and based on rules and regulations established at national level.

As a remote expert, it is not your task to assess the capacity of the participating organisations to support the costs of their project activities – it is to reflect on the appropriateness of the project's budget relative to its activities and ambition (remember that the costs of goods and services may be very different from what might be considered normal in your own country).

How to evaluate an application

To perform an evaluation, you must login to the [Eureka Project Management Platform \(EPMP\)](#). It is through the EPMP that you will complete and submit your evaluation.

Once logged into the EPMP, you will have access to all sections of the application form:

- Project details,
- Application questions,
- The details of the applying organisations,
- Declarations and
- Work packages.

If submitted by the applicants as part of the application form, you will also see the following annexes:

- Financial annex of the participating organisations.
- Technical annex.
- Gantt chart.

We ask you to:

1. Understand [your role](#) as a remote expert.
2. Carefully read the application and its annexes.
3. Rate each sub-criterion by using a scale from 1 to 6 points:
 - 1 being the lowest and
 - 6 being the highest.
4. Provide a justification for each score.
5. Double-check the content of your assessment.
6. Submit your assessment before the deadline.

Once you have submitted your evaluation, you will be able to see it in your EPMP Dashboard.

If improvements are required, you will receive an email requesting you to amend your evaluation.

If the quality issues continue to be unaddressed, we reserve the right to refuse payment and, in serious cases, to exclude you from our expert database.

Evaluation criteria and score

Applications are evaluated against three criteria and their sub-criteria.

You are required to assess each criterion by assigning a score to each of its sub-criteria. You will use a scale from 1 to 6 points, where 1 is the lowest score and 6 is the highest score. Each score must be fully justified.

Below are the three criteria and their sub-criteria. To evaluate them, please follow the instructions provided.

CRITERION 1: QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

This section focusses principally on PROJECT PLANNING AND CONSORTIUM QUALITY.



Please note: As a remote expert you cannot assess or comment on the participating organisations' capacity to finance the activities foreseen within the project. Only the Eurostars National Funding Bodies are responsible for verifying the financial capacity of the partners to support their project costs.

Eurostars is not exclusive to Europe. Organisations from anywhere in the world are welcome to join - as long as the consortium meets all eligibility criteria. Your assessment must be in line with this principle.

1. Quality of the consortium



Please comment on the following elements:

- The management experience of the partners.
- The core business activities of the partners.
- As a consortium, do the partners possess necessary and complementary key qualifications to meet the objectives and results?
- As individuals, does each partner have the necessary technological experience to carry out their tasks?
- Do all the partners have commercial and/or scientific interests in achieving the results?

Sections of particular interest within the application form:

- Application questions.
- Your organisation.

2. Added value through cooperation.

Please comment on the following elements:

- The benefits brought through cooperation – does this need to be done/benefit from being done cooperatively/ internationally?
- Does the project demonstrate clear sharing of risks, of costs, of know-how, of benefits?
- Is there a clear synergy in the partnership, e.g., the collaboration leads to results which are not independently obtainable, and which are greater than what could be achieved by any partner on its own?
- Does the cooperation support and expand capabilities and knowledge of each partner beyond project results, e.g., admittance to a new market, new technology and new skills?
- Do all SME partners stand to gain commercially from the exploitation of the project results?
- Does one partner stand to benefit disproportionately from exploitation of the project results (when compared to their input)?

Sections of particular interest within the application form:

- Application questions (including, and in particular, information relating to IPR).
- Your organisation.

3. Realistic and clearly defined project management & planning.

Please comment on the following elements:

- Methodology and planning approach.
- Does the project plan include a realistic time schedule in relation to tasks and objectives?
- Are key issues to be addressed and project objective(s) and results fully identified and precisely formulated from the outset?
- Are the project's goals clearly identified and logically set out through well described work packages?
- Are the work packages broken-down into logical, well-defined tasks which are relevant to the expected results?

- Are the milestones¹ and results² clearly identified? Do they allow verification of progress during project implementation, including go/no-go decisions?
- Is the project management structure well described? Is there an appropriate and capable structure for implementing the project (e.g., taking decisions, tracking, and ensuring progress, reporting, etc.)?
- Does the main partner (as project manager) have relevant project management experience, including experience of multi-partner projects?
- Do all partners have a well-defined role in the project and are the assigned project tasks in line with that partner's core business?
- Are the roles and responsibilities of each partner within each work package clearly described and differentiated in the work plan? Is task allocation by any partners to sub-contractors clearly identified?

Sections of particular interest within the application form:

- Application questions.
- Your organisation.
- Work packages.

4. Reasonable cost structure.

Please comment on the following elements:

- Are the project costs clearly justified?
- Are the costs reasonable (e.g., neither underestimated nor overestimated) for the proposed work and for each of the partners (consider, also, differences in living costs and wages between countries)?
- Is the cost breakdown well-structured and corresponds to the tasks and activities to be implemented by each partner?
- Are subcontracting costs appropriately justified?

Sections of particular interest within the application form:

- Your organisation.
- Work packages.

CRITERION 2: IMPACT

This section focusses principally on the MARKET AND COMMERCIALISATION.

¹ Milestones: Control points in the project that help to chart progress. Milestones may correspond to the achievement of a key result, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development. The achievement of a milestone should be verifiable (Horizon Europe (HORIZON) Programme Guide, p. 6).

² Results: What is generated during the project implementation. This may include, for example, know how, innovative solutions, algorithms, proof of feasibility, new business models, policy recommendations, guidelines, demonstrators, databases and datasets, trained prototypes, researchers, infrastructures, networks, etc. Most project results new (inventions, scientific works, etc) are 'Intellectual Property', which may, if appropriate, be protected by formal 'Intellectual Property Rights'. Example: Successful large le demonstrator: trial with 3 airports of an advanced forecasting system for proactive airport passenger flow management. (Horizon Europe (HORIZON) Programme Guide, pp. 6-7).

Please note: Eurostars supports close-to-market research. Commercialisation should be planned to start rapidly after the end of the project. For biotechnology, biomedical and medical projects, commercialisation or clinical trials should be planned to start rapidly after the end of the project.

1. Market size

Please comment on the following elements:

- Have the applicants quantified the market size, growth prospects and expected market share?
- Are these descriptions realistic?
- Is the potential market share well considered and justified?
- Is there a profitable market for the product?
- Does this represent a strong foundation for sustainable competitiveness?

Sections of particular interest within the application form:

- Application questions.
- Your organisation.

2. Market access and risk.

Please comment on the following elements:

- Are the partners qualified to break into the market or do they already have an established position?
- Has the proposal identified barriers to the market and/or included important customers, or in other ways reduced the time and costs to market:
 - regulatory,
 - standards and certification,
 - commercial,
 - competition,
 - quality,
 - pricing,
 - market acceptance.

Sections of particular interest within the application form:

- Application questions.
- Your organisation.

3. Competitive advantage.

Please comment on the following elements:

- Will the product be unique with very few competing products?
- Will the product have a significant price or quality advantage over competing products or have significant benefits to the customer?
- Have they carefully analysed existing IP and assessed whether it might affect their marketing approach?
- Will the partners be able to generate strong IP to prevent copying of the end results? Will they need to?

- Will the know-how developed within the project be such that they would have a very strong and clear time to market advantage over competition?

Sections of particular interest within the application form:

- Application questions.
- Your organisation.

4. Clear and realistic commercialisation plans.

Please comment on the following elements:

- Has the consortium clearly outlined the plans for commercialisation of the project results and are they realistic?
- Has the split or sharing of project results been defined with a view to commercialisation?
- Do the commercialisation plans include realistic and credible projections for:
 - revenue,
 - investment required,
 - anticipated costs associated with the product launch on the market.

Sections of particular interest within the application form:

- Application questions.
- Your organisation.

Please note: Eurostars supports close-to-market research. Commercialisation should be planned to start rapidly after the end of the project. For biotechnology, biomedical and medical projects, commercialisation, or clinical trials should be planned to start rapidly after the end of the project.

5. Economic, Environmental, and Societal Impact.

Please comment on the following elements:

- Has the consortium identified the project's positive contribution to the UN Sustainable Development Goals (SDGs)? Is the contribution well described and realistic?
- Are the potential outcomes³ and impacts⁴ (including their scale) realistically identified?
- Has the consortium identified any potential negative social and/or environmental effects that their project or project results may have? Has the consortium planned any mitigation measures? Are mitigation plans well described and effective?

Sections of particular interest within the application form:

- Application questions.

³ Outcomes: the expected effects, over the medium term, of a project. The results of a project should contribute to these outcomes. Outcomes generally occur during or shortly after the end of the project. Example: 10 regional hospitals adopt the new software (based on *Horizon Europe (HORIZON) Programme Guide*, pp. 6-7).

⁴ Impacts: Wider long-term effects on society (including the environment), the economy and science, enabled by the outcomes of a project. Impacts generally occur some time after the end of the project. Example: The deployment of the new software enables each hospital to increase diagnostic precision by 15%, leading to a 20% reduction in diagnostic delay (based on *Horizon Europe (HORIZON) Programme Guide*, pp. 6-7).

CRITERION 3: EXCELLENCE

This section focusses principally on the INNOVATION AND R&D.

1. Degree of innovation

Please comment on the following elements:

- Is the product technologically new or a significant improvement on existing solutions?
- Does it deliver objectively new products, processes or services to the consumer with an added value?
- Is the product an advance over the current commercial state-of-the-art?

Sections of particular interest within the application form:

- Application questions.

2. New applied knowledge.

Please comment on the following elements:

- Will the project lead to the creation of new knowledge which is not yet known in the area?
- Will the project resolve an issue of technical uncertainty, resulting in new knowledge?
- Will the new knowledge bring the partners to the forefront of the area in question and thus well beyond the present state-of-the-art?
- Could the technology or knowledge being developed be the potential basis for a wide number of applications?
- Does the application for the technology/knowledge have the potential to be expanded into other areas/ sectors beyond the scope of the application being developed in this project?

Sections of particular interest within the application form:

- Application questions (including, and in particular, information relating to IPR).

3. Level of technical challenge.

Please comment on the following elements:

- Does the project involve a high degree of technical challenge?
- Does achieving the project results require the application of a significant level of specialist's know-how and knowledge?
- Is the level of technical challenge such that the project results could not be easily replicated by others?

Sections of particular interest within the application form:

- Application questions (including, and in particular, information relating to IPR).

4. Technical achievability & risk.

Please comment on the following elements:

- Is the approach technically sound or is it fundamentally flawed?

- Is an appropriate technology being employed for the envisaged development?
- Are the proposed technical developments achievable within the defined budget and timescale?
- Is the research method described appropriate for achieving the technical developments (e.g., it includes a programme of design, test, analysis, decision and iteration if appropriate)?
- Does the research method include, in its different stages, a proper sex, gender and intersectional analysis?
- If sex, gender and intersectional analysis is not included in the research method, has the applicant properly justified why such analysis is not relevant to the project?
- Is there an appropriate analysis of the risks?
- Are the associated technical risks well described and approach to minimising the effects of the risks has been outlined?
- Does the project incorporate go/no-go decision points for appropriate results and at regular intervals?

Sections of particular interest within the application form:

- Application questions.
- Work packages.

Expert selection and deadlines

How can I register as a Eureka expert?

If you would like to work as a remote expert for Eurostars, you need to register to the [EUREKA Expert Community](#) platform and create an account. Once your profile has been verified, you will receive an invitation to complete your profile. Eureka will only approve experts who fulfil the required criteria. Find more information [here](#).

Completing your profile with all requested information and keeping it up to date will maximise your chances of being selected to evaluate applications.

How will I be selected to evaluate applications?

If your profile has been validated and you are registered as an eligible remote expert, **you will be contacted shortly before the submission deadline to see if you are available to evaluate applications.** If you respond positively, you are added to the list of available eligible experts.



Please note: If you are no longer available, please inform us as soon as possible by sending an email to experts@eurostars-eureka.eu. It is important to inform us before we start assigning you applications.

After the submission deadline, we begin to match the eligible applications to potential experts. This is performed by project officers with a technical, scientific, or engineering background, using database search engines. The project officers will read the application in question, and by using keywords and phrases, will search the data that has been entered by the experts in the expert database to identify three suitable experts from the eligible list. For insurance, the project officers will usually identify one or two reserve experts too.

It is possible that one expert is matched for several applications. If we think that the workload would present a potential problem, we will reallocate some to the reserve expert instead. It is also possible that an eligible expert receives no evaluations. This can be due to several reasons:

- You confirm your availability before the applications are received – we may not receive any within your specialist areas.
- You may be selected only as a reserve.
- You may have an excellent profile, but the database may contain more suitable individuals.

Eurostars is a fast process. We have an evaluation window measured in weeks, not months. As soon as we match applications to suitable experts, we will begin to assign the experts who have been chosen to perform an evaluation. Depending on the number of applications we receive, this may take several days to complete. **You may therefore be assigned over different days.**

For each application you are assigned to, you will receive:

- An email with your Statement of Work (SOW), defining the specific work to be undertaken according to the principles outlined in your Master Service Agreement (MSA). If you do not have a Master Service Agreement yet, the email will contain a template to be completed and signed.
- An email inviting you to login to the [Eureka Project Management Platform](#), where you can see the application/s assigned to you.

First, accept your SOW following the instructions in the first email.

Then, login to the [Eureka Project Management Platform](#) using the link in the second email. Once logged in, accept, or reject the application/s assigned to you once you have verified that you do not have any conflict of interest and that the application/s is/are in your area of expertise.



Please note: We count on your prompt reaction to ensure the successful completion of the evaluation process. If you do not accept or reject the assigned application/s within two days from receiving the emails, we may withdraw the invitation and seek an alternative expert.

The Eureka Secretariat is available to support you with any questions or technical assistance. Should you need any support, please do not hesitate to contact experts@eurostars-eureka.eu.

Delivery of the assessment

Evaluations must be performed in accordance with the expectations of quality outlined previously in these guidelines. Evaluations must be performed in English, and according to the following deadlines:

- For a single application, you will be expected to deliver the assessment within 6 days.
- For up to three applications, you will be expected to deliver them all within 10 days.
- For more than three applications, you will be expected to deliver them all within 15 days.



Please note: The deadline counts from the day you receive your first application. For example, if today you are assigned an application, you will be expected to deliver it within 6 days; if tomorrow you are assigned a second application, you will be expected to deliver both assessments within 10 days from receiving the first application.

There are many experts in many different countries; we cannot take into account your personal holidays or national holidays within the countries. However, we understand that things can

happen, and that circumstances can change. If you are called away for a few days, or are no longer available, please let us know as soon as possible so that we can discuss the situation and plan alternative arrangements that suit everyone.

If we have seen that you have not logged into the platform within two days, we will attempt to contact you to make sure that everything is fine.

If we cannot reach you and we cannot see that you are working, we will have to withdraw the invitation to evaluate applications and seek alternative experts.

Evaluations can only be submitted once. If you wish to amend the evaluation, please contact us soon as possible.

Confidentiality

The Eureka Secretariat

As a rule, only the employees of Eureka and the national funding bodies in Eureka's network can match specific evaluations to the experts who wrote them. We do not comment on the status of individual experts, and if you contact us and request a reference, we will only confirm whether or not you have performed any evaluations; we will be unable to provide an endorsement of your abilities, and we will not publicly acknowledge your role in the evaluation of a particular project.

Eurostars, like most publicly financed initiatives, is subject to performance reviews. Undertakings of this nature require the disclosure of certain information to organisations or individuals. Within this context, it may be possible to identify the specific work of specific individuals. Such information may be available to:

- Organisations:
- the European Commission and its executive agencies,
- auditors of the above organisations, and
- organisations charged with analysing the effectiveness of Eurostars as a funding instrument.

Experts are required to treat information contained within applications with the strictest confidentiality and to declare any potential conflict of interest.

The expert is responsible for ensuring and maintaining confidentiality of any data, documents or other material related to the evaluation process, during and after completion of the evaluation. In the case of a breach of those obligations, Eureka reserves the right to suspend any payment or compensation, and in serious cases, to undertake legal action.

Please be informed that your name and your technical area might be published on our website.

The expert

Experts are required to treat information contained within applications with the strictest confidentiality and to declare any potential conflict of interest. The expert is responsible for ensuring and maintaining confidentiality of any data, documents or other material related to the evaluation process, during and after completion of the evaluation. In the case of a breach of those obligations, Eureka reserves the right to suspend any payment or compensation, and in serious cases, to undertake legal action.

Information Security

Use of technical information

The electronic submission of evaluations uses https, which encrypts and decrypts the requests and information between the expert's browser and the server to which evaluations are submitted, using a Secure Socket Layer (SSL). SSL allows an SSL-enabled server to authenticate itself to an SSL-enabled client and vice versa, enabling the machine to establish an encrypted connection.

Data Protection Act

The Eureka Association is situated in the Kingdom of Belgium and governed by Belgian and EU data protection laws. More information can be found (in English, Dutch, and French) on <http://www.privacycommission.be>.

Any queries on issues relating to data protection should be addressed to:

Eureka Association, Avenue de Tervueren 2, 1040 Brussels, Belgium or to privacy@eurekanetwork.org.