Report on the retrospective evaluation of the call procedures

Work Package 4 - Deliverable 4.2
Delivery date: 7 November 2017
Dissemination Level: Public

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Lead beneficiary: BELSPO
Project full title: ERA-NET Cofund “European Research Area for Climate Services”
Grant Agreement number: 690462
Funding scheme: Horizon 2020 SC5-02-2015

Project acronym: ERA4CS
Project start date: 1st January 2016
Duration: 60 months
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About ERA4CS

The ERA-NET "European Research Area for Climate Services" (ERA4CS) is a network of 45 partner organisations: 15 public Research Funding Organisations (RFOs) and 30 Research Performing Organisations (RPOs) from 18 European countries, designed to boost the development of efficient Climate Services (CS) in Europe. Most partners come from countries participating in the Joint Programming Initiative on "Connecting Climate Knowledge for Europe" (JPI Climate), a pan-European intergovernmental initiative gathering European countries to jointly coordinate climate research and fund new transnational research initiatives that provide useful climate knowledge and services for post-COP21 Climate Action.

ERA4CS is funded as an ERA-NET Cofund action under the European Union's Horizon 2020 Framework Programme (Grant Agreement number 690462). Its partners intend to develop a durable collaboration in research funding policy and practices, thereby creating added value in high quality research contributing to the development of the European Research Area for CS. To improve user adoption of and satisfaction with CS, the overall aim is to research and advance CS development by supporting scientific research for developing better tools, methods and standards on how to produce, transfer, communicate and use reliable climate information to cope with current and future climate variability and change across national boundaries.

ERA4CS Joint Call

Scope and objectives

The aim of this joint call was to enhance national CS activities and support the various disciplines to address research gaps that exist between the diverse needs of user communities and climate system science.

The call placed an emphasis on integrated research that creates a bridge between observations, model development, operational products, information translation and user uptake. One of the main objectives of ERA4CS is to improve quality, satisfaction and user adoption of CS (including adaptation services). At the same time, ERA4CS aims to improve the scientific expertise on climate change (CC) risks and adaptation options, and to connect that knowledge with decision-making, e.g. by developing and assessing climate adaptation strategies and pathways for countries, regions, cities, catchments and vulnerable sectors.

The feedback loop from users to research development is crucial in this context during the project lifetime, from co-design of research priorities to co-development of tools, up to the co-production and co-evaluation of products and a subsequent refinement of the research strategy. Resulting products/instruments from ERA4CS will help to assess vulnerability, impacts, and adaptation responses to current and future climate variability and change, including extremes for specific regions, sectors, over relevant time periods and spatial scales. They may for example be designed to provide insight into CC effects in urban and/or rural areas, in order to assist in determining the appropriate risk reduction and adaptation measures. They could also advance understanding of integrated management of small to large scale ecological and social systems (e.g. a city within a larger system) and how this can be optimised to face climate variability and change (e.g. for the prevention of droughts or flooding or the adverse effects of other extreme events). CS may also be designed to help e.g. shaping a climate adaptation plan for an entire catchment area or river basin, shedding light on the integrated behaviour of water systems influenced by CC and dynamic user demands. The concept could include approaches to address multi-driver vulnerability, risk and economic analyses, e.g. arising from infrastructure investments, assessing aspects of adaptation measures, and guiding their implementation in planning processes and including dealing with conflicting interests, institutional issues and wider societal and environmental objectives.
By developing a "translation layer along the CS chain", ERA4CS expects to stimulate advanced solutions for risk reduction and adaptation, including the management of uncertainties, possibly giving at the same time an impulse for the development of a CS market. The assessment of the potential of such advanced approaches in the field of CS (including demonstration of the added value) was part of this call. The operational deployment and building of the market itself, as well as the routine provision of raw and generic climate information (observations, projections, etc.) was not included.

**Call topics**

The call was organised into two distinct and complementary topics, with separate target groups, funding modes and specific evaluation criteria. The topics were:

**Topic A: “Advanced co-development with users”**

This topic was open to all applicants from the 13 countries with participating RFOs, compliant with the national eligibility criteria. For this topic, the support to selected proposals takes the form of financial grants from the RFOs to their national research teams. For this reason, Topic A is usually called the “cash topic”. A fixed proportion of these financial grants is then reimbursed by the European Commission to the RFOs, according to the pre-agreed rules of the ERA-NET.

Proposals for this topic were invited to address one or more of the three following topic areas:

- **A1: Research in support of the development and deployment of Climate Services**
- **A2: Integration and application of Climate Science for decision making**
- **A3: Research for co-development of advanced Climate Services**

**Topic B: “Institutional integration”**

This topic was open only to applicants from the 30 mandated RPOs, subject to their specific eligibility criteria. This means that this topic was not open to external applicants outside of these organisations. For this topic, the support to selected proposals takes the form of in-kind contributions from the RPOs (e.g. manpower, equipment and travel). For this reason, Topic B is usually called the “in-kind topic”. A fixed proportion of this in-kind support is then reimbursed by the European Commission to the RPOs, according to the pre-agreed rules of the ERA-NET.

Proposals for this topic were invited to address one or more of the three following topic areas:

- **B1: Development of new methods and tools**
- **B2: Impacts studies and models**
- **B3: Localisation of climate information and evaluation of uncertainties**

For both topics, the proposals were expected to present clear connections to users and their needs in framing and implementing the research.

It was also agreed in the Grant Agreement of ERA4CS that the European Union support to the successful proposals would be divided in proportion to the cash and in-kind funding from the Member States.

**Organization and responsibilities**

Topic A was supervised by a Management Board composed of representatives of the contributing RFOs, called the Cash Management Board (CMB). Similarly, Topic B was supervised by a Management Board composed of representatives of the contributing RPOs, called the In-kind Management Board (KMB). The CMB and the KMB
were assisted by a Joint Call Secretariat (JCS) operated by ANR (the agency coordinating the ERA-NET). Proposals to both topics were evaluated by a single Expert Panel in order to insure an equivalent level of quality in the two topics.

**Call timeline**

The timeline for the various steps of the joint call is presented in table 1.

**Table 1. Timeline for the ERA4CS Joint Call.**

<table>
<thead>
<tr>
<th>STEP</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Pre-proposal phase</strong></td>
<td></td>
</tr>
<tr>
<td>First pre-announcement</td>
<td>Early January 2016</td>
</tr>
<tr>
<td>Opening date of the call</td>
<td>1 March 2016</td>
</tr>
<tr>
<td>Collect Expert Panel (EP) member names from the Cash Management Board (CMB) and the extended Transdisciplinary Advisory Board (TAB)</td>
<td>From 1 March 2016</td>
</tr>
<tr>
<td>Appoint Chair and Vice Chairs of the EP</td>
<td>28 April 2016</td>
</tr>
<tr>
<td>Contacting potential members of the EP</td>
<td>From 1 May 2016</td>
</tr>
<tr>
<td>Deadline for submission of Cash pre-proposals (topic A)</td>
<td>1 July 2016</td>
</tr>
<tr>
<td>Deadline for submission of In-Kind proposals (topic B)</td>
<td>15 July 2016</td>
</tr>
<tr>
<td>Decision on the final composition of the EP</td>
<td>18 July 2016</td>
</tr>
<tr>
<td>Transnational eligibility check by the Joint Call Secretariat (JCS)</td>
<td>18 July 2016</td>
</tr>
<tr>
<td>Eligibility check by the CMB</td>
<td>18 July 2016</td>
</tr>
<tr>
<td>Assignment of Cash pre-proposals to EP members</td>
<td>18 July 2016</td>
</tr>
<tr>
<td>Deadline for assessment submission</td>
<td>31 August 2016</td>
</tr>
<tr>
<td>Pre-selection of proposals by the EP and CMB for Cash topic</td>
<td>5-7 September 2016</td>
</tr>
<tr>
<td>In-Kind Management Board (KMB) meeting for final eligibility and selection of pre-proposals</td>
<td>14-15 September 2016</td>
</tr>
<tr>
<td>Invitation to submit full proposals or rejection with eligibility/assessment reports</td>
<td>23 September 2016</td>
</tr>
<tr>
<td>Collect names of external reviewers for invited Cash topic full proposals</td>
<td>Early October 2016</td>
</tr>
<tr>
<td>Collect names of external reviewers for invited In-Kind topic full proposals</td>
<td>Early October 2016</td>
</tr>
<tr>
<td><strong>Second step selection</strong></td>
<td></td>
</tr>
<tr>
<td>Deadline for submission of full proposals</td>
<td>23 November 2016</td>
</tr>
<tr>
<td>Eligibility check by CMB</td>
<td>Early December 2016</td>
</tr>
</tbody>
</table>
Minor changes check by KMB | Early December 2016
---|---
Send full proposals to external reviewers and EP members | Early December 2016
Deadline for assessment submission from the external reviewers | Mid-January 2017
Deadline for assessment submission from EP members | Early February 2017
EP meeting and CMB/KMB meetings for both topics | 7-9 February 2017
Official funding decisions taken | End February 2017
Communication of final results | March 2017
Start of the projects | September 2017

**Call procedures**

The evaluation for this call was implemented in a two-step procedure, according to the timeline/milestones described above. In the first step, applicants were invited to submit pre-proposals, which described a short outline of the proposed work. The pre-proposals were checked against eligibility criteria by the Joint Call Secretariat (JCS) (formal criteria) and the Cash Management Board (CMB) members (partners’ rules). The applications that passed that check were then submitted to the Expert Panel (EP). The EP met to:

- Grade the most promising applications from the cash topic;
- Advise on potential redundancy between the in-kind pre-proposals and the cash topic to avoid possible conflicts of interest;
- Make recommendations to applicants for the second step (if needed).

In the second step of the evaluation, the submitted full proposals from both topics were reviewed by at least three independent external experts. In a second meeting of the EP, taking into account all this information, the EP agreed on scores for all proposals. The evaluation of full proposals was aligned on the scoring system and criteria (‘excellence’, ‘impact’ and ‘quality and efficiency of the implementation’), as presented in Annex H of the General Annexes of the H2020 Work Programme 2014-2015.

The consortium took all lawful steps to ensure confidentiality of information and documents obtained during the evaluation and selection procedures of this joint call.

**Launch of the call and establishment of the submission and evaluation portal**

The call for proposals was published on the JPI Climate website and by the national funding organisations via their national publishing media such as websites, newsletters and press announcements.

A call pre-announcement was published to maximise the early mobilisation of the climate services research community. The call was open for the submission of proposals from 1 March to 30 June 2016. A specific electronic portal for the submission and evaluation of the proposals was set up by Agence Nationale de la Recherche (ANR, France), the leader of the work package responsible for the launch, evaluation and selection of the overall co-funded call.

Given that one of the aims of this call was to promote transdisciplinarity and cooperation between researchers from 18 European countries, the JCS decided to help partners in building their consortia.
For this purpose, a tool was created to connect people: the ERA4CS Research Matching System. Creation and moderation of this website were carried out by the JCS and ANR.

The JCS acted as a central helpdesk to the applicants regarding all aspects of proposal drafting and submission. In addition, each partner organisation participating in the call established a National Contact Point (NCP) for this call. The applicants were strongly encouraged to contact their adequate representative for advice on partner-specific rules and regulations, including eligibility and financial budget rules. Advice was available continuously by telephone and e-mail throughout the entire period of call implementation.

**Establishment of the international Expert Panel**

The JCS was responsible for the establishment of the EP. Its composition was based on the propositions from the CMB, with additional input from the extended Transdisciplinary Advisory Board (TAB) of the ERA-NET. The EP members were internationally recognised scientists chosen for their scientific, technical and/or specific expertise in the field of climate services. The EP was, as far as possible, gender and geographically balanced, including experts from countries not participating in the call. The reviewers were carefully selected with regard to any potential conflict of interest. To ensure the necessary expertise to review the proposals, the EP consisted of 19 members.

**National or partner-specific eligibility of cash pre-proposals**

The CMB coordinated the national eligibility checks for all partners involved in the cash topic. Each partner RFO performed a verification of compliance to their specific rules for all pre-proposals requesting their funds.

**National or partner-specific eligibility of in-kind pre-proposals**

The In-Kind Management Board (KMB) coordinated the “national” eligibility checks for all partners involved in the in-kind topic. Each partner RPO performed a verification of compliance to their specific rules for all pre-proposals requesting their funds.

**Transnational eligibility, evaluation by the EP and decision for pre-proposals**

**Formal check of pre-proposals**

The JCS checked all pre-proposals (cash and in-kind topics) to ensure that they met the call formal criteria (date of submission; number and country distribution of participating research groups; inclusion of all necessary information in English, page length). The JCS then forwarded the proposals to the CMB and KMB members, who performed a verification of compliance to national or partner-specific rules. Pre-proposals not meeting the formal conditions were rejected without further review and with no possibility of appeal.

**First EP meeting**

All pre-proposals meeting the eligibility requirements were sent to the EP. Each pre-proposal was sent to at least two reviewers of the EP (the JCS was helped in this task by the EP Chair and by the CMB).

The EP members were asked:

- for cash topic pre-proposals, to score them based on the scoring system and criteria mentioned above (‘excellence’, ‘impact’ and ‘quality and efficiency of the implementation’);
- for in-kind topic pre-proposals, to check eventual redundancy with the cash topic to avoid conflicts of interest.

The written statements from the reviewers were collected by the JCS. The EP met to forge a consensus after a contradictory debate: scoring for cash-topic pre-proposals and redundancy check
for in-kind pre-proposals. The recommendations by the EP were sent to the CMB for cash pre-proposals and to the KMB for in-kind pre-proposals. Based on these recommendations, the CMB and KMB took the final decision regarding invitations to submit full proposals.

**Invitation to submit full proposals**

Following the decision of the CMB and KMB, the JCS invited the project coordinators of the selected pre-proposals to submit full proposals for the second step of the evaluation process, including possible recommendations from the EP, CMB or KMB. For the rejected pre-proposals, the EP members prepared a brief written summary of the panel discussions, which were collected by the JCS. This summary was anonymous and sent to the coordinators of the rejected pre-proposals.

**Eligibility, EP evaluation and grading of full proposals**

NB: The KMB did not take part in this task.

**Formal criteria check and external reviews**

The JCS checked the submitted full proposals to ensure that they met the call formal criteria and have not changed substantially from the respective pre-proposals. For both topics, under the responsibility of the EP Chair, each proposal was assigned to at least two EP members for review. These members indicated external reviewers for each proposal, which were contacted between step 1 and step 2 to take part in this process. At least three external reviews were indicated for each proposal. All reviewers were asked to use a common evaluation form for the written reviews and to score the proposals according to the evaluation criteria and scoring system indicated above (‘excellence’, ‘impact’ and ‘quality and efficiency of the implementation’).

**Second EP meeting**

The JCS sent the full proposals and external reviews to the EP members. The EP met to discuss each proposal, taking into account the external reviews and their own expertise. As in the first step for the cash topic, the evaluation for both topics followed the scoring system mentioned above. Finally, the EP made a classification of the proposals by grade for both topics. For the cash topic, no decimals were used, allowing a coarse ranking with ex-aequo. For the in-kind topic, decimals were used for fine ranking. The EP members prepared a brief written summary of the panel discussions for all proposals, which were collected by the JCS. The anonymous written summary was sent to the applicants after funding decisions have been announced. Some members of the CMB were present at the EP meeting as observers. Additionally, an independent expert was invited as official observer to the second EP meeting to assess the conformity of the general implementation of the joint call and, specifically, the proper implementation of the international peer review and establishment of the list of transnational projects ranked by grade. The assessment of the observer was provided in a report to the European Commission (EC).

**Funding decisions and communication**

The EC funding available to support the selected projects was computed as one third of the total cost of the ERA-NET minus the implementation costs. This was divided between the two topics in proportion of the total commitments of the RFOs (for the cash topics) and the RPOs (for the in-kind topics) considering only the selected proposals.

**Cash topic funding decision**

The CMB met to make its final funding decision based strictly on the scientific recommendation of the EP (list of transnational projects ranked by grade). As many full proposals as possible with a funding recommendation (grade higher than a set minimum) were funded, taking into account the available budget. Each eligible applicant was funded by the organisation it has applied to and...
according to its administrative regulations (virtual common pot model). The final distribution of the EC top-up funding was discussed and agreed by the CMB in order to maximize the number of high quality proposals that were funded by filling funding gaps and/or topping up the partner contributions. When the proposals had identical grades, i.e. *ex-aequo* ranking, the proposals coming from participating Member States or Associated Countries with still available funding were given precedence, in order to further maximize the number of selected projects and/or country participation. The list of selected projects to be funded was communicated to the EC. The applicants were informed about the final funding decision and possible recommendations. The RFOs were then invited to negotiate contracts with the successful applicants on these bases, respecting the commonly agreed starting date of 15th September for all projects. This was possible in almost all cases, with very few exceptions.

**In-kind topic funding decision**

The KMB did not meet to make the final funding decision, because:

- the KMB had insured after the first step the availability of funds for all proposals invited to the second step;
- the KMB had already decided to use a virtual common pot model with a fixed ratio of EC contribution for each RPO funding of a given project.

Thus, the selection of proposals for the in-kind topic followed the order on the ranking list established by the EP and stopped automatically once there were no more projects proposed for funding by the EP. The list of selected projects to be funded was communicated to the EC. The applicants were informed about the final funding decision and possible recommendations. The RPOs were then invited to take all necessary formal steps to start the selected projects respecting the commonly agreed starting date of 15th September. This was possible in all cases.

**Communication**

The final funding lists (one for the cash topic and one for the in-kind topic) were prepared by the JCS and provided to Work Package 6 (WP6) for publication on the ERA4CS website, the relevant EC portals and in the JPI Climate webpage.

**Results of the call**

Topic A received 54 pre-proposals for a total requested funding of 96M€. The individual budget requests were ranging from 0.8M€ to 4.4M€. 36 proposals were invited to submit a full proposal. Out of these, 18 were selected for funding for a total of approx 34 M€.

Topic B received 12 pre-proposals for a total requested funding of approx 53M€. The individual budget requests were ranging from 1.1M€ to 18M€. All proposals were invited to submit a full proposal. Out of these, 8 were selected for funding. The total funding allocated to these projects is approx 29M€.

**Analysis and evaluation of the call procedures**

**Analysis by the JPI Climate Governing Board**

After the publication of the final funding lists, the JPI Climate Governing Board (GB) discussed the lessons learnt from ERA4CS, with the objective of improving the implementation of future actions. Several key questions on the instrument and procedures were questioned, including combining cash and in-kind topics in the same call, with an implied increased complexity.
It was noted that the number of applications to this call had been less than for other ERA-NETs. This may reflect the fact that, in some countries, the research teams did not identify themselves with this call. The topic of CS is still driven by the natural sciences community. This may have posed a challenge for the participation of the social sciences community from those countries in this call.

It was noted that the call had set a lower limit for the size of proposals but no upper limit. In fact, topic B had received at least one very large proposal that could have raised difficulties if funded.

A limit for each country’s participation in a given project may also be considered in the future to avoid difficulties in balancing the funding from the RFOs in the final phase.

The participation of international organisations in proposals to such joint calls poses a specific problem as it is not clear who should fund them. Precise rules should be agreed in advance of the call.

Analysis by the independent observer

An independent expert was invited to observe and report on the evaluation process and to ensure that the rules governing EU co-funding were followed. His analysis of the evaluation process was divided into several aspects and the main observations for each aspect are presented below.

The overall impressions of the observer on the evaluation procedures are presented below under quotes.

“Organisation and logistics

The evaluation panel had a very good disciplinary and geographic diversity and that more than half of the panel members were female.

Despite the efforts of the EP Chair and the organising team, the EP meetings still ran long. This demonstrates that evaluating transdisciplinary proposals is very challenging and requires more time than reviewing more disciplinary-oriented proposals.

Briefing of the evaluators

Detailed instructions were sent in advance to the members of the EP. In addition to these, the EP members received a detailed briefing at the outset of the meeting. According to the observer, the discussions at the meetings were deep, the EP members were able to obtain the information they needed to fulfil their roles and they were satisfied with the discussions.

Consensus meetings

The EP worked in plenary, so there were no break-out groups to discuss and evaluate proposals. As such, the panel in its entirety reached consensus for each proposal.

The organising team provided impressive support in terms of quickly producing summary tables and statistics for the evaluation.

Ranking of the evaluated proposals

Three EP members were assigned to each proposal (1 rapporteur, 2 lecturers). In addition, each proposal had been reviewed by two external reviewers. The external evaluations were taken as advisory information, with the EP’s own grading being the basis for the final score. Each of the three EP members who were assigned to a proposal reviewed it independently and assigned scores (integer scores for Topic A and decimal scores for Topic B) in three categories: Excellence, Impact and Implementation. The rapporteur for the proposal had the responsibility to write a summary and explanation of the scoring so that the funding agencies would have information about the reasoning behind the final score.
The reviews were very thorough and professional. The process was transparent and unbiased and the observer had no suggestions for how this aspect could be improved. However, it was unclear to the observer (and apparently to the EP) what was the strategy behind the integer scoring for Topic A proposals.

**CMB meetings**

The CMB members approved the ranking of the EP and the discussions were focused on how to best combine contributions from the various agencies to maximise the amount of research that could be funded. The willingness of some of the funding agencies to adjust their contributions upwards and allow subcontracts to cover limitations that other agencies had in terms of fully funding proposals was a very welcome development and the observer hopes that this trend continues in the future.

**Overall impressions**

The evaluation process has been in compliance with the relevant EU rules and procedures and it was in full accordance with the procedures published in the call.

This process was transparent and fair with respect to the research community at large. Furthermore, the process was highly transparent, fair, confidential and unbiased within the EP and the organising team.

This was a complex endeavour and the speed with which the process was driven was very good.

Overall, the entire process was of very high quality. “

**Appreciation of the evaluation procedures by the LPIs and NCPs**

One critical aspect for the evaluation of the call procedures was the appreciation of these procedures by the coordinators of successful and unsuccessful research proposals to both call topics (A and B), as well as the feedback from the National Contact Points (NCPs) of the participating public RFOs in topic A of this co-funded call.

In order to complete the report, the authors of the deliverable 4.2 (D4.2 team) decided to develop and disseminate online questionnaire surveys targeted to the NCPs and the coordinators of the research proposals (LPIs). The surveys were launched on 22 August 2017.

The surveys were a mix of open and closed questions and were sent to 100 persons (34 NCPs topic A, 54 coordinators of proposals to topic A, 12 coordinators of proposals to topic B).

The templates of these surveys can be found in Annex 1 (questionnaire to the NCPs topic A) and Annex 2 (questionnaire to the coordinators of the research proposals) of this report.

We received 14 responses to the questionnaire targeted to the NCPs (41.18% response rate) and 35 responses to the questionnaire targeted to the coordinators of the research proposals (53.03% response rate). These responses were carefully analysed and some of the trends in the responses (presented in terms of percentage) are highlighted below.

**Questionnaire to the NCPs (topic A)**

The majority of the NCPs inquired considered that the call was clear.

In fact, all the respondents agreed that the call was well announced, and the majority (92.31%) agreed that the information regarding the call in the ERA4CS website was sufficiently clear, transparent and accessible for the participants (Figure 1).
Nevertheless, the NCPs played a key role in the clarification of the call to the applicants, since most of them (more than 80%) were contacted by the applicants with requests for clarification. Most of these requests were related to the instructions, guidelines and national eligibility criteria of the call. The NCPs also provided frequent clarifications on the partnerships (including how and where to look for partners), explaining the complexity of the nature of the call. Table 2 presents the nature of the clarifications requested by the call applicants to the NCPs.

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>The scope, objectives or thematic of the call</td>
<td>38.46% 5</td>
</tr>
<tr>
<td>The instructions, guidelines and national eligibility criteria</td>
<td>84.62% 11</td>
</tr>
<tr>
<td>The partnerships (including how and where to look for partners)</td>
<td>53.85% 7</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>23.08% 3</td>
</tr>
<tr>
<td>Total Respondents: 13</td>
<td></td>
</tr>
</tbody>
</table>

Table 2. Responses to the survey question “The clarifications from you to the applicants were mostly needed on:”, targeted at the NCPs of topic A of the co-funded call.

These clarifications seemed to be efficient, since more than 78% of the NCPs stated that the applicants did not have difficulties in finding partners for the call.

Furthermore, the clarifications did not prevent applicants to apply for the call, since the majority of NCPs indicated that the number of applications received was as expected by their organisations. Only 21% of the NCPs considered that the number of applications to this co-funded call received by their organisations was lower than expected (Figure 2).
According to the NCPs, the application forms for this call were sufficiently clear, since that more than 71% of the respondents indicated that they did not have to help the applicants to complete the pre-proposal form. For the full proposal form, this number increased to more than 78%.

Regarding the recommendations from the EP to the applicants, the vast majority of the respondents (more than 85%) indicated that they did not have to clarify the recommendations from the panel to the applicants, both on the pre-proposals and full proposals.

The clear separation between topics A and B of the call seemed to be effective, as more than 84% of the NCPs informed that they were not contacted by applicants preparing proposals for topic B. Furthermore, these NCPs were not aware of contacts between applicants preparing proposals for topic A and applicants preparing proposals for topic B.

This call also worked as a capacity building tool for the NCPs involved. In fact, most of the respondents (more than 78%) indicated that they had exchanges with other NCPs or with the ERA4CS JCS regarding this call. All respondents saw benefits from these exchanges. Overall, the participation on this call was seen as beneficial for the NCPs, when compared to the overall effort (Figure 3).

**Figure 2.** Responses to the survey question “For your organisation, the number of applications was:”, targeted at the NCPs of topic A of the co-funded call.
Figure 3. Responses to the survey question “How do you assess the benefits of your participation in this call (possibilities to network, capacity building, developing new collaborations, etc.) compared to the overall effort (administration, time spent, etc.)?”, targeted at the NCPs of topic A of the co-funded call.

From the funders' perspective, the participation in the call was seen as positive, since the majority of the organisations are likely to participate in a joint call with similar conditions (budget, composition of the consortia, stakeholder involvement, timeline, etc.) (Table 3).

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very likely</td>
<td>57.14%</td>
</tr>
<tr>
<td>Likely</td>
<td>42.86%</td>
</tr>
<tr>
<td>Slightly likely</td>
<td>0.00%</td>
</tr>
<tr>
<td>Not at all likely</td>
<td>0.00%</td>
</tr>
<tr>
<td>TOTAL</td>
<td></td>
</tr>
</tbody>
</table>

Table 3. Responses to the survey question “How likely is your organisation to participate in a joint call with similar conditions (budget, composition of the consortia, stakeholder involvement, timeline, etc.) in the future?”, targeted at the NCPs of topic A of the co-funded call.

Questionnaire to the coordinators of the proposals (topics A and B)

The majority of the respondents to the questionnaire (more than 76%) had submitted proposals to topic A.

Consistent with the results observed for the NCPs, the coordinators of the research proposals also considered that the call was clear.

According to the majority of the respondents (more than 87%), the call was well announced. Most of the applicants heard about the call through their colleagues, but both the ERA4CS and the JPI Climate websites were also effective in the dissemination of the call. Table 4 presents a list of different sources used by the applicants to learn about the call.
Table 4. Responses to the survey question “How did you hear about this call?”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERA4CS website</td>
<td>25.71%</td>
</tr>
<tr>
<td>JPI Climate website</td>
<td>20.00%</td>
</tr>
<tr>
<td>ERA4CS newsletter</td>
<td>0.00%</td>
</tr>
<tr>
<td>JPI Climate newsletter</td>
<td>0.00%</td>
</tr>
<tr>
<td>JPI Climate social media (Twitter, LinkedIn)</td>
<td>0.00%</td>
</tr>
<tr>
<td>National funding agency website</td>
<td>11.43%</td>
</tr>
<tr>
<td>National funding agency communication channels</td>
<td>20.00%</td>
</tr>
<tr>
<td>University/research centre communication channels</td>
<td>22.86%</td>
</tr>
<tr>
<td>Colleagues</td>
<td>42.86%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>2.86%</td>
</tr>
<tr>
<td>Total Respondents: 35</td>
<td></td>
</tr>
</tbody>
</table>

For the majority of the participants in the questionnaire (more than 90%), the rationale, scope and objectives of the call as stated in the ERA4CS website were clear and transparent. The thematic priorities of the call as stated in the website were clear for the vast majority of the respondents (more than 94%). The access to the call documents in the ERA4CS website was considered to be easy and the instructions, guidelines and procedures described in these documents were clear for most of the participants (Figures 4 and 5).

![Figure 4](image-url) Responses to the survey question “The access to the call documents in the ERA4CS website was easy”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.
Figure 5. Responses to the survey question "The instructions, guidelines and procedures described in the call documents were clear", targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

The specific requirements for this call (eligibility, budget and size of the projects, composition of the consortia, stakeholder involvement [topic A], institutional integration [topic B]) were considered adequate for the type of expected proposals by the majority of the respondents (Figure 6). The evaluation criteria and weighting matrix that were made available to the applicants were helpful in the preparation of the applications, according to more than 85% of the participants in the questionnaire (Figure 7).

Figure 6. Responses to the survey question “The specific requirements for this call (eligibility, budget and size of the projects, composition of the consortia, stakeholder involvement [topic A], institutional integration [topic B]) are adequate for the type of expected proposals”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.
However, only 57% of the respondents considered that the specific national requirements and/or eligibility criteria were adequate and sufficiently flexible for the preparation of their applications (Figure 8).

According to the coordinators of the proposals, the application forms for this call were sufficiently clear, since that more than 85% of the respondents acknowledged that the pre-proposal form was easy to complete. The information requested in each section of the pre-proposal form was clear (according to 88.6% of the respondents) and the time period for the preparation of the pre-proposals was just right (according to 85.7% of the participants in the questionnaire).
The majority of the respondents also recognised that the feedback by the expert panel on the pre-proposals was sufficient, clear and transparent (Figure 9) and that the recommendations from the EP on the pre-proposals were helpful to prepare the full proposals (Figure 10).

**Figure 9.** Responses to the survey question “The feedback by the expert panel on the pre-proposal was sufficient, clear and transparent”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

**Figure 10.** Responses to the survey question “The recommendations from the expert panel on the pre-proposal were helpful to prepare the full proposal”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.
For the full proposal form, only 57.1% of the respondents agreed it was easy to complete. The information requested in each section of the full proposal form was clear (according to 65.7% of the respondents) and the time period for the preparation of the full proposal was just right (according to 68.6% of the participants in the questionnaire). For more than 60% of the respondents, the feedback by the EP on the full proposal was sufficient, clear and transparent (Table 5).

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>8.82%</td>
</tr>
<tr>
<td>Agree</td>
<td>52.04%</td>
</tr>
<tr>
<td>Disagree</td>
<td>17.65%</td>
</tr>
<tr>
<td>Strongly disagree</td>
<td>11.76%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>8.82%</td>
</tr>
<tr>
<td>TOTAL</td>
<td>100%</td>
</tr>
</tbody>
</table>

Table 5. Responses to the survey question “The feedback by the expert panel on the full proposal was sufficient, clear and transparent”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

The coordinators of the proposals also recognised the key role of the respective NCP throughout the call process. For more than 85% of the respondents, the interaction with the respective NCP was constructive and effective.

Consistent with the results reported by the NCPs, the coordinators of the research proposals indicated that they did not have difficulties in finding partners for this call (88.6% of the respondents). The majority (62.9%) found their consortium partners via a research partner. Interestingly, only 8.57% of the respondents found their consortium partners via the ERA4CS Research Matching System (Table 6).

<table>
<thead>
<tr>
<th>ANSWER CHOICES</th>
<th>RESPONSES</th>
</tr>
</thead>
<tbody>
<tr>
<td>ERA4CS Research Matching System</td>
<td>8.57%</td>
</tr>
<tr>
<td>Via another online platform</td>
<td>2.86%</td>
</tr>
<tr>
<td>Via a research partner</td>
<td>62.86%</td>
</tr>
<tr>
<td>Other (please specify)</td>
<td>16.67%</td>
</tr>
<tr>
<td>Total Respondents: 35</td>
<td></td>
</tr>
</tbody>
</table>

Table 6. Responses to the survey question “How did you find your consortium partners?”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

The majority of the coordinators of the research proposals consider that their participation in the call was positive, compared to the overall effort (Table 7).
Table 7. Responses to the survey question “Regardless of the success of your application, how do you assess the benefits of your participation in this call (networking, capacity building, new collaborations, new research ideas, identification of new research needs by the users, etc.) compared to the overall effort (administration, application, time spent, etc.)?”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

Consistent with this feedback, more than 82% of the respondents indicated that they are likely or very likely to apply to a call with similar conditions in the future (Figure 11).

Figure 11. Responses to the survey question “How likely are you to apply to a call with similar conditions (budget, composition of the consortia, stakeholder involvement, institutional integration, etc.) in the future?”, targeted at the coordinators of the proposals (topics A and B) to the co-funded call.

Furthermore, a large majority of the participants in the questionnaire (more than 73%) saw an added value for this type of call (separate implementation of topics A and B).


Suggestions to improve future calls

Suggestions by the JPI Climate GB

The JPI Climate GB recognised that the nature of this action fostered new partnerships and that was considered an added value of ERA4CS. Therefore, the GB recommends that similar actions are encouraged in the future. However, there is a need for a clear scope of the future calls to avoid creating confusion and to increase the level of participation by the community.

Suggestions by the independent observer

The independent expert invited to observe and report on the evaluation process produced the following recommendations to improve future calls that may have a transdisciplinary nature:

- It would be useful for JPI Climate to develop and publish a short paper providing a common definition of the central terms and concepts in CS and a description of the degree of transdisciplinarity and stakeholder involvement that is required and expected in the proposals;

- If evaluation panels are to review proposals of a transdisciplinary nature, the panel members should meet in advance of the actual review to arrive at a common understanding of definitions and ranking procedures;

- The requirement for integer scoring should be reviewed by the consortium of funding agencies;

- Funding agencies should develop a handbook and/or training programme for researchers designed to instruct them on how to properly incorporate stakeholders into the research process and the research proposals they prepare;

- Funding agencies should explore including a risk-reward criterion in proposal evaluations;

- The call secretariat, in collaboration with the consortium members, should develop a single detailed description of the rationale behind the topics and sub-topics of the call. This document (“handbook”) should be used by all consortium members when providing advice to national researchers;

- Funding agencies should attempt to be pedantically clear in describing what characteristics are desired in proposals submitted to particular calls. The review panel (or cash management panel, whichever is most appropriate) should be given an explicit mandate to recommend to proposers that they give more careful consideration of the category to which they are submitting their proposals;

- Final decisions about funding are up to the funding agencies. Whatever the final funding decisions may be, there should be a clear delineation between the degree to which scientific evaluation and national priorities played a role in the final assessment.
Suggestions by the NCPs (topic A)

When asked about the most important positive aspects of this call, the NCPs indicated the transdisciplinary nature of the call (the integration of users as full partners of research), the thematic scope of the call, which was very timely, the quality of the EP and the JCS, the success rates of the projects and the networking possibilities for the RFOs.

The following issues were identified by the NCPs and should be taken into account when developing future calls:

- Each RFO has its own rules (national requirements, eligibility criteria, etc.), which may create obstacles when building a consortium. A harmonisation of the countries’ different methods would be recommended in the future;

- The grant models and working methods of the RFOs were very different and should be harmonised in the future;

- The focus and themes of the call were very broad and it was therefore not always clear what was expected from the applicants;

- The “firewall” between topics A and B that was maintained during the preparation of this call is questionable. Future calls (towards RFOs) should be designed in a way that can take benefit from existing topic B projects, given that the ultimate goal of ERA4CS should be to create synergies between projects from topics A and B;

- The work needed to prepare for topic B was difficult and the involvement of the KMB members should be improved;

- It is important to define clearer boundaries of the scope of the call (for example, are mitigation services included?) and to provide the financial commitment table very early to allow for strategic consortium building.

Suggestions by the coordinators of the proposals (topics A and B)

When asked about the most important positive aspects of this call, the coordinators of the proposals indicated the support to the networking for co-development of CS, the transdisciplinary nature of the call (the emphasis on co-production), the possibility to work together to improve the approaches and to advance CS at the European scale, the opportunity to interact with other European RPOs on new research areas in this field (fostering scientific cooperation and favouring the growth of a community capable of providing effective and sustainable CS), the opportunity to truly innovate and foster research on effective solutions against climate change, promoting international cooperation, and the clear and timely nature of the topics (addressing real societal needs).

The following issues were identified by the coordinators of the proposals submitted to topic A and should be taken into account when developing future calls:

- The online submission platform was slow and it was hard to upload the information;

- For Topic A, the preparation of the proposals took a long time and felt repetitive, in particular when having to submit a translation of the proposal, with further requirements, to the national funders, during the contract negotiation phase;
Different national rules apply, which makes coordination of such proposals and answers to the quite heterogeneous administrative questions of project partners complex. The novelty of the programme sometimes made advice from the NCPs difficult. Furthermore, the timeframe for proposal evaluation and assessment was not communicated beforehand;

A more coherent planning between the involved RFOs, checking very carefully and sufficiently early on all potential aspects that can disrupt the teams, would be very useful;

The requirements from some RFOs have been very difficult to understand by scientists from other countries in the phase of contract negotiation.

For the phase of national contract negotiation, some scientists had to write completely new proposals in their own language and the time for handling the proposals were very slow in some countries. This makes it difficult to harmonise the work and time plans - and even setting a starting date;

It is a great challenge to carefully spend the budget. Whereas it is clear for scientists and is conform to other calls, practitioners have other fees and wishes to spend the budget. Having similar budget restrictions for all the participating countries or clearer advice in which country it would make more sense to look for a non-academic partner would be very helpful;

It is difficult to have a submitted and assessed joint proposal split into several partner-specific proposals during the contract negotiation phase in order to meet national administrative needs. It would be good to have in the future a single proposal submitted by each consortium and forming the basis of contract negotiation for each supporting RFO. For the future, a single set of rules for all partners, independently of their country of origin, may be considered;

The procedures were very different from country to country. Some countries took as long as six months to notify acceptance of the proposal to their national scientists and start the contract negotiation phase. This puts the whole project at risk and should be improved in the future;

It is important to clarify the conceptual approach to CS and co-production (broader and more flexible). As it stands, it seems that the call is meant for very specific projects, and difficult for institutions with less experience to join.

The following issues were identified by the coordinators of the proposals submitted to topic B and should be taken into account when developing future calls:

A more clear explanation about the budget aspects: in-kind vs funded, considered eligible costs, etc, should be provided;

It would be useful to provide a template of Consortium Agreement to the teams;

The online submission platform was slow and it was hard to upload the information;

A more effective support in the phase of contract negotiation;
• The implementation of the financial aspects may be confusing, especially for in-kind partners. A more complete introduction to ERA-NETs and the financing modes would be helpful.

Suggestions by the JCS

• Organising this joint call with two topics has been a complex undertaking. It is recommended to plan sufficient time to produce all call rules and documents very early in any Co-fund action. Whenever RPOS are involved, the RFOs should realize that these organisations are not used to manage calls and plan accordingly. A very clear document on the Roles and Responsibilities needs to be agreed at the beginning of the action, and all actors should constantly be reminded to refer to this text.

• There was at least one very large proposal submitted to the call (18.2 M€ requested involving 19 RPOs). This project was not selected for funding for purely scientific reasons. However, if selected, this proposal would have created difficulties in balancing the general funding and the overall economy of the call. We recommend here to have a limitation on the maximum size of proposals submitted to such joint calls.

• The specificities of this call (i.e. two kinds of funding) requested many exchanges to implement proposal templates and set up the submission website accordingly. This one needs to have flexibility to answer RFOs’ and RPOs’ needs and access. The submission website for ERA4CS call was not flexible enough and we encountered some difficulties to answer the requests by all the partners. The JCS produced additional guidelines to find solutions but this kind of challenges should be anticipated and the web portal should be selected and implemented in a very early stage to avoid any confusion for applicants.

• In few cases, projects were delayed in the contract negotiation phase by a lack of alignment of the contractualization agenda of the various RFOs. The JCS recommends that more consultation between the RFOs take place before launching the call on the possible timetable for contract negotiation.

• International Organisations can be eligible for funding if the Head Office is based in a country participating in the call – i.e. IIASA in Austria or WASCAL in Germany. However, as these organisations are international, it does not seem fair to seek only budget from their host country. This problem was solved empirically by the ERA4CS consortium, by deciding to allocate more EC funding (following EC rules) to these countries. The JCS recommends that a clear rule to handle such cases be agreed in advance of the call.

• The JCS encountered difficulties to find External Reviewers (ERs) to assess proposals. However, to assess transdisciplinary proposals, the evaluation process needs to involve many high level ERs. The JCS suggests dedicating a budget in order to provide fees to ERs. This help could facilitate positive answers from solicited experts.

• Some proposals to topic B included as “in-kind contribution of the RPO” work already funded via another action of the European Union (e.g. Copernicus contract on Climate Services). It is important to recall that this type of in-kind contribution is not admissible according to the rules of the EC. The JCS advises that, for future in-kind calls, the nature of eligible in-kind contributions be described in more detail, with precise examples of eligible and non-eligible contributions.
ANNEX 1
European Research Area for Climate Services (ERA4CS)
2016 Joint Call
Questionnaire to the national contact points (Topic A)

Estimated time: 5 - 10 minutes

1. Based on potential feedback you have received from the applicants, the launch of the call was well announced.

   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree

2. The information regarding this call in the ERA4CS website was sufficiently clear, transparent and accessible for the applicants.

   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree

3. Were you contacted by the applicants with requests for clarification of the call?

   - Yes
   - No

4. The clarifications from you to the applicants were mostly needed on:

   - The scope, objectives or thematics of the call
   - The instructions, guidelines and national eligibility criteria
   - The partnerships (including how and where to look for partners)
   - Other aspects.

   Please specify: ___________________________________________

5. For your organisation, the number of applications was:
6. In your opinion, the number of applications to this call may be related with:
- The scope, objectives or thematics of the call
- The instructions, guidelines and national eligibility criteria
- The partnerships (including how and where to look for partners)
- Other aspects.

*Please specify: ________________________________________________*

7. Did you have to help applicants to complete the pre-proposal form?
- Yes
- No

8. Did you have to clarify the recommendations from the expert panel on the pre-proposals to the applicants?
- Yes
- No

9. Did you have to help applicants to complete the full proposal form?
- Yes
- No

10. Did you have to clarify the feedback from the expert panel on the full proposals to the applicants?
- Yes
- No

11. Were you contacted by applicants preparing proposals for Topic B ("Institutional integration")?
- Yes
- No
12. To the best of your knowledge, were there any contacts between applicants preparing proposals for Topic A ("Advanced co-development with users") and applicants preparing proposals for Topic B ("Institutional integration")?

- Yes
- No

13. Based on your experience, did the applicants have difficulties in finding partners for this call?

- Yes
- No

14. Did you have any exchange with other national contact points or with the ERA4CS joint call secretariat regarding this call?

- Yes
- No

15. Did you see any benefits from these exchanges (possibilities to network, clarifying doubts and questions, forging new interactions, etc.)?

- Yes
- No

16. How do you assess the benefits of your participation in this call (possibilities to network, capacity building, developing new collaborations, etc.) compared to the overall effort (administration, time spent, etc.)?

- Very good
- Good
- Moderate
- Bad
- Very bad

17. How likely is your organisation to participate in a joint call with similar conditions (budget, composition of the consortia, stakeholder involvement, timeline, etc.) in the future?

- Very likely
- Likely
- Slightly likely
- Not at all likely

18. Please state the most important positive aspects of this call.
19. Please state the most important issues that should be improved in future calls.
ANNEX 2
European Research Area for Climate Services (ERA4CS)
2016 Joint Call
Questionnaire to the coordinators of the proposals (Topics A and B)

Estimated time: 10 minutes

1. Call topic
   ○ Topic A (“Advanced co-development with users”)
   ○ Topic B (“Institutional integration”)

2. How did you hear about this call?
   ○ ERA4CS website
   ○ JPI Climate website
   ○ ERA4CS newsletter
   ○ JPI Climate newsletter
   ○ JPI Climate social media (Twitter, LinkedIn)
   ○ National funding agency website
   ○ National funding agency communication channels
   ○ University/research centre communication channels
   ○ Colleagues
   ○ Other
     Please specify: ________________________________

3. The launch of the call was well announced.
   ○ Strongly agree
   ○ Agree
   ○ Disagree
   ○ Strongly disagree

4. The rationale, scope and objectives of the call as stated in the ERA4CS website were clear and transparent.
   ○ Strongly agree
5. The thematic priorities of this call as stated in the ERA4CS website were clear.
- Strongly agree
- Agree
- Disagree
- Strongly disagree

6. The access to the call documents in the ERA4CS website was easy.
- Strongly agree
- Agree
- Disagree
- Strongly disagree

7. The instructions, guidelines and procedures described in the call documents were clear.
- Strongly agree
- Agree
- Disagree
- Strongly disagree

8. The specific requirements for this call (eligibility, budget and size of the projects, composition of the consortia, stakeholder involvement [topic A], institutional integration [topic B]) are adequate for the type of expected proposals.
- Strongly agree
- Agree
- Disagree
- Strongly disagree

9. The evaluation criteria and weighting matrix that were made available to the applicants were helpful in the preparation of the application.
- Strongly agree
- Agree
- Disagree
10. The pre-proposal form was easy to complete.
   - Strongly disagree
   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree

11. The information requested in each section of the pre-proposal form was clear.
   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree

12. The time period for the preparation of the pre-proposal was:
   - Much too long
   - Too long
   - Just right
   - Too short
   - Much too short

13. The feedback by the expert panel on the pre-proposal was sufficient, clear and transparent.
   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree

14. The recommendations from the expert panel on the pre-proposal were helpful to prepare the full proposal.
   - Strongly agree
   - Agree
   - Disagree
   - Strongly disagree
   - Not applicable
15. The full proposal form was easy to complete.
- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Not applicable

16. The information requested in each section of the full proposal form was clear.
- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Not applicable

17. The time period for the preparation of the full proposal was:
- Much too long
- Too long
- Just right
- Too short
- Much too short
- Not applicable

18. The feedback by the expert panel on the full proposal was sufficient, clear and transparent.
- Strongly agree
- Agree
- Disagree
- Strongly disagree
- Not applicable

19. The interaction with your national contact point(s) was constructive and effective.
20. Do you consider that the specific national requirements and/or the eligibility criteria were adequate and sufficiently flexible for the preparation of your application?

- Yes
- No

21. Did you have difficulties in finding partners for this call?

- Yes
- No

22. How did you find your consortium partners?

- ERA4CS Research Matching System
- Via another online platform
- Via a research partner
- Other

Please specify: ______________________________

23. Regardless of the success of your application, how do you assess the benefits of your participation in this call (networking, capacity building, new collaborations, new research ideas, identification of new research needs by the users, etc.) compared to the overall effort (administration, application, time spent, etc.)?

- Very good
- Good
- Moderate
- Bad
- Very bad

24. How likely are you to apply to a call with similar conditions (budget, composition of the consortia, stakeholder involvement, institutional integration, etc.) in the future?

- Very likely
- Likely
- Slightly likely
25. Do you see an added value for this type of call (separate implementation of Topics A and B)?
   - [ ] Not at all likely
   - [ ] Yes
   - [ ] No

   Please comment: ________________________________

26. Please state the most important positive aspects of this call.

27. Please state the most important issues that should be improved in future calls.