

Memorandum of understanding for the 2024-2025 Biodiversa+ Call

Biodiversity and Transformative Change (BiodivTransform)



Co-funded by
the European Union

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

Version	Date	Modified by	Modification reasons
V0	24 April 2024		Initial version. This document was developed from the MoU used in previous Biodiversa+ Calls and slightly updated in order to improve the overall Call Process and to meet requirements specific to BiodivTransform (if any).
V1	5 June 2024	Clara Superbie and Céline Billière	This new version integrates feedbacks received from the CSC members during the “major revision round” and following discussions and agreements during the CSC meeting organised on May 28 and 29.
V2	2 July 2024	Clara Superbie and Céline Billière	This is the final version of the MoU sent to the CSC members for signature. It integrates final minor revisions received from CSC members in the final round (post-CSC meeting) and an update of the list of participating funding organisations where relevant.

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This Memorandum of Understanding (MoU) is agreed upon between the following Funding Organisations:

FWF, Fonds zur Förderung der wissenschaftlichen Forschung (Austria)
BELSPO, Service Public Fédéral de Programmation Politique Scientifique (Belgium)
FNRS, Fonds de la Recherche Scientifique (Belgium)
FWO, Fonds Voor Wetenschappelijk Onderzoek-Vlaanderen (Belgium)
CNPq, Brazilian National Council for Scientific and Technological Development (Brazil)
CONFAP, Brazilian National Council of State Funding Agencies (Brazil)
BNSF, Bulgarian National Science Fund (Bulgaria)
TA CR, Technology Agency of the Czech Republic (Czech Republic)
IFD, Innovation Fund Denmark (Denmark)
ETAG, Sihtasutus Eesti Teadusagentuur (Estonia)
RCFI, The Faroese Research Council (Faroe Islands)
RCF, Research Council of Finland (Finland)
ANR, Agence Nationale de la Recherche (France)
DFG, German Research Foundation (Germany)
VDI/VDE-IT, VDI/VDE Innovation + Technik GmbH - participating on behalf of BMBF (Germany)
NKFIH, National Research Development and Innovation Office (Hungary)
Rannis, Icelandic Centre for Research (Iceland)
EPA, Environmental Protection Agency (Ireland)
MoEP, Ministry of Environmental Protection (Israel)
MUR, Ministry of Universities and Research (Italy)
BOZEN, Autonomous Province of Bolzano/Bozen (Italy)
LZP/LCS, Latvian Council of Science (Latvia)
LMT, Research Council of Lithuania (Lithuania)
NARD, National Agency for Research and Development (Moldova)
MESRSI, Minister of Higher Education and Scientific Research and innovation (Morocco)

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NWO, Netherlands Organisation for Scientific Research (Netherlands)
RCN, Research Council of Norway (Norway)
NCN, Narodowe Centrum Nauki (Poland)
FRCT, Fundo Regional para a Ciência e Tecnologia (Portugal, Azores)
UEFISCDI, The Executive Agency for Higher Education, Research, Development and Innovation Funding (Romania)
SAS, Slovak Academy of Sciences (Slovakia)
MVZI, Ministry of Higher Education, Science and Innovation (Slovenia)
DSI, Department of Science and Technology (South Africa)
AEI, Agencia Estatal de Investigación (Spain)
CDTI, Centre for the Development of Technology and Innovation (Spain)
FB, Fundación Biodiversidad (Spain)
Formas, The Swedish Research Council for Environment, Agricultural Sciences, and Spatial Planning (Sweden)
SNSF, Swiss National Science Foundation (Switzerland)
NSTC, National Science and Technology Council (Taiwan)
MHESR, Ministry of Higher Education and Scientific Research (Tunisia)
TÜBİTAK, Türkiye Bilimsel Ve Teknolojik Arastırma Kurumu (Türkiye)

Referred hereinafter as “the Funding Organisations (FOs)”

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Introduction

Biodiversa+ is the European Biodiversity Partnership supporting excellent research on biodiversity with an impact for society and policy. It was jointly developed by BiodivERsA and the European Commission (DG R1I and DG ENV) as part of the EU Biodiversity Strategy 2030, and will contribute to the ambition that “by 2030, nature in Europe is back on a path of recovery, and that by 2050 people are living in harmony with Nature”, as detailed in the Biodiversa+ Strategic Research and Innovation Agenda (SRIA; <https://www.biodiversa.eu/wp-content/uploads/2022/12/strategic-research-innovation-agenda.pdf>).

Biodiversa+ currently gathers 82 research programmers and funders and environmental policy actors from 41 European and associated countries. Over 7 years (2022-2028), Biodiversa+ Partners are planned the launch of six co-funded Calls for research projects (approx. 40M€ each), biodiversity- and ecosystems monitoring and science-based policy advising activities.

As part of the Biodiversa+ Flagship programme on “Supporting societal transformation for the sustainable use and management of biodiversity” launched in Sept. 2022, 41 Biodiversa+ Funding Organisations from 34 countries will implement a joint Call for inclusive transnational research proposals on “**Biodiversity and Transformative Change (BiodivTransform)**”, which will promote the integration of natural sciences, technical sciences, social sciences and humanities, and stakeholder engagement in the projects. This call is co-funded by the European Commission, which is increasing the available budget for this call by providing additional funding to that made available by the EC-eligible Funding Organisations.

Through their budget and the use of the EC “top-up” funding for EC-eligible countries, the Funding Organisations will strive to maximise the number of high-quality transnational research projects that can be funded through this Call.

Glossary

Associated Countries	<p>Associated Countries are countries who signed an association agreement with the European Union and its Members. In Horizon Europe, legal entities from Associated Countries can participate under the same conditions as legal entities from the Member States. The list of Associated Countries is available here:</p> <p>https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_en.pdf</p> <p>NB: not all associated countries listed at this link participate in this call. Only researchers from countries that confirmed their participation and reserved a budget for this call can be eligible for funding. See TABLE 1: LIST OF FUNDING ORGANISATIONS AND THEIR FUNDING COMMITMENTS in the Call Documents (Annex 1) to verify whether a country participates or not in this call.</p>
Call Secretariat	<p>For the entire period of each Call, the Call Secretariat will be in charge to prepare, coordinate and follow-up the joint Call processes, both electronically and physically. It will work in cooperation and consultation with the Call Steering Committee and provide the CSC with all documents needed for decisions (see Annexes 2 and 3).</p>
Call Steering Committee (CSC)	<p>The CSC is responsible for the practical implementation and follow-up of the Call. It is composed of one mandated representative from each Funding Organisation taking part in the Call, who will be the reference point for the participation of his/her organisation in the development and implementation of the Call (see Annex 3).</p>
Evaluation Committee (EvC)	<p>The EvC is a committee of experts (referred hereafter as “EvC members”) that reviews and ranks pre- and full proposals. The EvC meets to agree on a final evaluation and ranking of pre-proposals (Step 1) and full proposals (Step 2).</p>
Expert	<p>Experts are independent academic scholars or non-academic stakeholders with relevant skills and expertise with respect to the topic of the call. They can be mobilised for the development of the call and/or for the selection process. During the selection process, experts can act as EvC co-chairs, EvC members or external reviewers.</p>
External Reviewer	<p>An external reviewer is an independent expert that provides a (remote) written peer review of a proposal, as opposed to EvC members who review several applications and discuss them during a joint meeting.</p>
Funding Organisation	<p>A Funding Organisation is a national or regional organisation participating in the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”, which requires signing the present Memorandum of Understanding.</p>

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<i>Funding Organisation Contact Point (FCP)</i>	A FCP represents a Funding Organisation and can be contacted by applicants and the Call Secretariat to give information on or explain the Call procedures as well as national and/or regional rules and procedures.
<i>Participant</i>	A participant may be a Partner, a self-financed Partner or a subcontractor.
<i>Partner</i>	Depending on the Funding Organisation, a “Partner” may be a researcher, an institution or an organisation, a laboratory, or a department of an institution contributing to the implementation of the research project.
<i>Project Partner Coordinator</i>	The Project Partner Coordinator is a research Partner that coordinates a consortium submitting a proposal under this call (i.e., Partner in charge). It is identified as research Partner 1.
<i>Self-financed Partner</i>	A self-financed Partner is a Partner who brings their own secured budget in the call and fully cover their costs. Self-financed Partners can be from countries participating or not in the call.
<i>Subcontractor</i>	Subcontractors are subcontracted by eligible Partners that have to comply with their respective funding organisation rules. Generally speaking, subcontracting is understood as the externalization of the execution of a (minor) project task that research Partners cannot execute.

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The Funding Organisations decide as follows:

1. General Objective

The purpose of this Memorandum of Understanding (MoU) is to establish the procedures for the 2024-2025 joint call under a transnational funding programme within the context of Biodiversa+, as well as the benefits and conditions of the Funding Organisations and funding provisions.

Relating to the implementation of the joint call, the Funding Organisations decide to jointly specify the topic, disseminate the call and establish the application, review and funding procedures.

The Funding Organisations' objective will be to maximise the number of high-quality transnational research projects that can be funded through this call.

This MoU is a mutual statement of intention among the Funding Organisations who decide to make every reasonable effort to fulfil the intentions herein.

2. Procedures

1. Funding Model

The Funding Organisations decide to launch a joint call and use a joint evaluation with national/regional funding and additional EC co-funding for EC-eligible Funding Organisations. The grants for the funded research projects will be awarded on a national/regional basis by the relevant Funding Organisations and administered according to their terms and conditions, taking into account all other applicable regulations and legal frameworks, including – for EC-eligible Funding Organisations – the regulations of the European Commission. In principle, each Funding Organisation will thus fund its own research teams (i.e. following the ‘juste retour’ model); yet using different levels of flexibility depending on their internal rules, they might fund foreign teams. The Funding Organisations decide to endeavour to fund as many of the highest ranked proposals as possible and selection must be made strictly following the final ranking list established by the EvC.

The funding organisations should reserve a budget that is coherent with the size and capacity of their research community. They should also define maximum funding amounts per project (or Partners) that are both coherent with their budget and attractive for applicants. The overall goal of these setting is to avoid risks of excessive funding pressure on the one hand, and to preserve or foster the attractiveness of the call at the national/regional level on the other hand.

The EC top-up funding for each EC-eligible Funding Organisations will be predominantly allocated according to the Funding Organisations' respective actual financial contribution to the joint call.

The EC-eligible Funding Organisations accept to use the EC contribution for research as a “mix-mode” funding model composed of

- **85% *pro rata* actual spent**, i.e., 85% of the EC contribution to support research will be allocated *pro rata* to the Funding Organisations, based on their respective actual contributions.

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- **15% "flexibility" common pot**, i.e., 15% of the EC contribution will be put into a "flexibility" common pot that will be used to close the gaps of funding within the ranking list. Funding Organisations first have to fulfil their commitments indicated in table 1 (Document 1 of [Annex 1](#)) before they are allowed to get money from the common pot.

In addition, a funding organisation cannot access EC money to more than its actual allocation of national/regional funds to this call, unless the CSC decides otherwise. The final budget reserved to the Call by all the Funding Organisations is listed in the Call Announcement of opportunity (see table 1 “LIST OF FUNDING ORGANISATIONS AND THEIR FUNDING COMMITMENTS” in Document 1 of [Annex 1](#)).

The Call Steering Committee (CSC) will be able to adjust the redistribution of EC funding between a virtual (pro-rata) and real (“flexibility”) common pot during the funding meeting, where decided upon by the CSC according to the voting rules detailed in [Annex 2](#). For this particular decision, only CSC members eligible to EC top-up funding will be invited to vote.

The funding organisations will have to confirm the budget requested by their applicants by the final CSC funding decision in September. Once the funding decision is taken, increase of the requested budget might not be taken into account anymore for the computation of the EC top-up of the concerned funding organisation.

2.1.1. Levels of flexibilities

Funding Organisations are aiming to fund as many of the highest ranked proposals as possible and selection must be made strictly following the final ranking list established by the EvC.

Funding gaps may arise in the ranking when one of the Funding Organisations runs out of money. Funding Organisations intend to deal with these gaps through the following level of flexibility:

- A Funding Organisation does not have to spend all the funds that have been provisionally reserved, if the funding request by its applicants is lower than its reserved budget;
- In order to avoid early funding gaps, each Funding Organisation is asked to match as accurately and realistically as possible the financial demand from their respective research communities with the budget earmarked for the call. It means that all solutions to unblock situations at the national/regional level will be explored, such as:
 - Some Funding Organisations may be able to come up with extra money to fund good proposals;
 - Funding Organisations may define maximum threshold values for budget requested from the Funding Organisation per proposal or per team in the Funding Organisation eligibility rules;
 - Some Funding Organisations may ask the applicants to realistically reduce their requested contribution;
 - Some Funding Organisations may be able to fund foreign teams (e.g., via subcontracting, via the release of (part) of their respective virtual common pot, etc.).

These different levels of flexibility will be explored according to FO respective rules and regulations (i) before the launch of the call, (ii) after the first evaluation step, and (iii) after the final evaluation of the full proposals.

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2.1.2. Funding particularities¹

Some Funding Organisations have defined specific funding rules. These rules will be detailed in the annexes dedicated to each Funding Organisation’s eligibility and funding rules that will be published on the [Biodiversa+ website](#) upon the launch of the call.

2.1.3. Measure to encourage participation and improve success of countries / regions with small research communities and/or where research applications have been less successful at Step 1 (pre-proposals)

The CSC will explore measures to encourage participation of countries/regions that have small research community and/or previously had less success with their research applications, for instance by organising informative meetings, webinars, etc. In addition, a tentative list of **undersubscribed** funding organisations will be published on Biodiversa+ website, in agreement with the relevant funding agencies, before the launch of the Call, in order to encourage their inclusion. This list could include funding organisations who has no teams funded under the last two Biodiversa+ Calls where they participated as funders.

Two other specific measures will be set-up between Step 1 (pre-proposals) and Step 2 (full proposals) to encourage proposals with applicants from countries/regions with small research communities and/or where research applications have been less successful:

1) Measure to apply when deciding on the proposals to be invited to Step 2 by the CSC
Between Step 1 and Step 2, when deciding on the proposals to be invited to Step 2, pre-proposals within group B (“could be invited to Step 2”) with Partners depending on Funding Organisations with research communities that have been less successful with their applications (i.e. **undersubscribed funding agencies**), will be favoured in case of proposals **with equal ranking / in a same ranking group**. This specific measure applies only to pre-proposals that are ranked in group B (“could be invited to Step 2”).

Other elements will be considered to decide on the number of proposals invited to Step 2 (see “6. Review and evaluation procedure”)

2) Widening option

- On a **voluntary basis**, consortia invited to submit a full proposal in Step 2 have the possibility to include one or several new research Partner(s) from undersubscribed funding organisations between Step 1 and 2. The inclusion of one or several new research Partner(s) should be **relevant for the proposal**, and new Partner should be well integrated in the consortium.
- The addition of a Partner from undersubscribed funding organisations **is not considered as one of the maximum two changes allowed but the eligibility procedure**

¹ For the detailed evaluation procedure (scoring and ranking), please see [Annex 1](#)

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remains the same and funding organisation national/ regional rules must be respected.

On the Biodiversa+ website:

- a) An updated list of undersubscribed funding organisations will be made public (based on the results of Step 1 and the definition of “undersubscribed funding organisations”).
- b) The acronym, title and keywords of the pre-proposals invited to Step 2 will be published

Communication to applicants

- a) Successful consortia are informed in the invitation letter to Step 2 about the possibility to change the composition of their consortium and about the exception that adding a Partner from an undersubscribed funding organisation is not considered for the maximum of two allowed changes. The information about undersubscribed funding organisation is included in the letter. The successful consortia are informed that only eligible Partners can be added to their consortium.
- b) Undersubscribed funding organisations inform their scientific communities about the possibility of joining teams invited to the second stage of the call (i.e. via their websites).

On the Partner search Tool (PST)

- a) After the announcement of the results of Step 1, all entries from the Partner search Tool will be cleared.
- b) Applicants from undersubscribed funding organisations can declare their interest to join a consortium invited to Step 2. To facilitate contact with the Coordinator of the full proposal, applicants are invited to include the acronym of the proposal they want to join when declaring their interest in the PST. They are also encouraged to check the PST for new offers of interest by successful consortia.
- c) The successful consortia may use the PST to look for new Partners from undersubscribed funding organisations, in case they would like to add expertise to their consortium. They have the opportunity to post a detailed offer on the Biodiversa+ PST.

Definition of undersubscribed funding organisations between Step 1 and 2:

Funding Organisations will be considered as “research communities that have been less successful with their applications”, i.e. as undersubscribed funding organisations, in two cases:

- Organisations with no teams invited to Step 2
- Organisations with a very limited number of teams invited to Step 2, i.e. organisations with less projects invited to Step 2 than the number needed to statistically get one project funded.

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- Example: if 90 proposals are invited to Step 2, and 18 projects are expected to be funded, the average success rate at Step 2 will be 20%. Statistically speaking, Funding Organisation(s) with less than 5 projects invited to Step 2 won't have projects funded in the end of the process. Partners depending on these organisations would thus be concerned by the measures proposed.

Other concrete measures might be submitted to the CSC for decision.

2.1.4. Failure to honour funding commitment and fall-back procedure

Funding Organisation's procedures for joint programme funding will be made explicit to the Call Secretariat and CSC in order to avoid any unexpected delays or issues. Each Funding Organisation will be asked to confirm – by signing the present MoU – that it will honour its engagement and accepts the joint evaluation procedure specified in this document with no national/regional pre- and post-selection².

However, in the implementation of joint calls, it can happen that a Funding Organisation will fail to honour its commitment to fund research teams in the selected projects, citing force majeure. In case of such a failure from a Funding Organisation, there will not be any judicial proceedings.

If a Funding Organisation fail to secure its funding commitment within four months after the CSC made its decision on funding recommendation, a procedure for re-evaluation will be launched. The proposal will be reviewed without the considered research teams and re-assessed. The exact process of the re-evaluation procedure will be decided by the CSC.

2. Management of the call

Three call management bodies will be appointed:

- **The Call Steering Committee (CSC):**

The Funding Organisations decide on the creation of a joint **Call Steering Committee (CSC)** for this call appointed by the Funding Organisations.

The CSC will be responsible for the practical implementation of the call.

The composition, mandate and functioning (incl. voting rules) of the CSC are defined in the Terms of reference in [Annex 2](#).

- **The Call Secretariat (CS):**

The **Call Secretariat** is located at the Funding Organisation(s) leading the call, i.e. ANR and NCN, and will assist the CSC.

The mandate of the Call Secretariat is detailed in the Terms of reference in [Annex 3](#).

² For the detailed evaluation procedure (scoring and ranking), please see [Annex 1](#).

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● The Funding Organisation Contact Point (FCP):

Each Funding Organisation will indicate a **Funding Organisation Contact Point (FCP)** whom the applicants can approach to enable an effective implementation of the call. This means taking into account and paying particular attention to Funding Organisations’ rules and requirements including eligibility criteria, financial budget regulations and the legal form of eligible Principal Investigators (natural person or legal person i.e., institution). The FCPs will be coordinated by the Call Secretariat to avoid duplication of efforts. The Call Secretariat will provide a FAQ available on the Biodiversa+ website.

3. Defining the topic and disseminating the Call

The Funding Organisations intend to arrange a call for transnational research projects on the topic “Biodiversity and Transformative Change (BiodivTransform)” (Document 1 of [Annex 1](#)). This Call aims at supporting collaborative research projects gathering different research Partners generating new knowledge and solutions based on the production of new primary data and/or by making use of available data.

The Call will be announced on the [Biodiversa+ website \(https://www.biodiversa.eu/BiodivTransform\)](https://www.biodiversa.eu/BiodivTransform) and the Funding Organisations’ respective websites. The Call documents and the rules of the Funding Organisations will be available (and updated as needed) on the [Biodiversa+ website](#).

4. Appointment of an independent observer

Within the framework of European Partnerships’ co-funded joint call, the European Commission (EC) requires that the CSC appoints an external observer who will follow the whole evaluation process and especially the final EvC meeting during which the final ranking list is established. Based on his/her observations, the independent observer will produce a report for the EC.

The main purpose of the independent observer is to report on whether the evaluation process complied, as expected, with the rules that govern the EC co-funded calls. In particular, this concerns the way the expert evaluators (i.e., EvC members) apply the assessment criteria, the process of arriving at a fair and transparent consensus decision and the establishment of the final ranking list of proposals. The observer may also offer suggestions on how the procedure could be improved.

Guidelines for the independent observer, as well as his/her tasks throughout the call evaluation process are detailed in [Annex 8](#).

The independent observer will receive a fee for carrying out this task that is fixed at a standard rate of 500 EUR. This rate is net of any taxes (however, social charges apply), under the French applicable law. The fee will be paid by the French Foundation for Research on Biodiversity (FRB), as the entity hosting the Biodiversa+ core secretariat.

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5. Application procedure

The Funding Organisations decide on procedures, eligibility and proposal requirements specified in [Annex 1](#).

- A two-Step procedure for joint applications will be followed, consisting of the submission of pre-proposals at Step 1 and full proposals at Step 2.
- The submission of a pre-proposal is compulsory. Applicants cannot submit a proposal at a later stage otherwise.
- Pre-proposals and full proposals must be received before the deadlines set for the submission.
- Proposals must meet all the formal criteria: submitted electronically, respect page limits and number/type of attachments allowed.
- The language of the call and applications is English.
- The scope or scale of the proposed research should exceed a single country, and this will be checked by the EvC when assessing transnational added-value. The eligibility of research Partners will be checked according to the Funding Organisations' eligibility criteria (see Funding Organisations' rules available at <https://www.biodiversa.eu/research-funding/participating-funding-organisations/>). The Call Secretariat cannot be held responsible for any ineligibility decision taken by a Funding Organisations with regard to its own rules. Each research Partner is advised to contact their FCP to ensure that they comply fully with their Funding Organisation's eligibility criteria.
- The eligibility of budget items will be checked according to the Funding Organisations' rules.
- The project must be a transnational project involving **eligible research Partners from at least three different countries participating in the call** and requesting support from at least three different Funding Organisations; including eligible research Partners from at least two different EU Member States or Associated Countries³ participating in the call.
- The Project Partner Coordinator (or consortium coordinator's entity, i.e., research Partner 1) must be eligible to be funded by one of the countries participating in the call. A Project Partner Coordinator (i.e., the person in charge) can only participate as coordinator in one proposal of this call. Otherwise, applicants can participate in several proposals (as long as this is in line with their Funding Organisation's eligibility rules).
- For consortia willing to include participants beyond the ones eligible for Funding Organisations, these participants may take part in the project:

³https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/common/guidance/list-3rd-country-participation_horizon-euratom_en.pdf NB: not all associated countries listed at this link participate in this call. Only researchers from countries that confirmed their participation and reserved a budget for this call are eligible for funding. See TABLE 1: LIST OF FUNDING ORGANISATIONS AND THEIR FUNDING COMMITMENTS in the Call Documents ([Annex 1](#)) to verify whether a country participates or not in this call.

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- Either if they are subcontracted, which should be made clear in the application and is subjected to the terms and conditions of each Funding Organisation;
 - Or, if they are self-financed. In the latter case, it should be clearly indicated how their participation to the project will be funded. Self-financed Partners will have to provide a letter of commitment (written in English) through the Electronic Proposal Submission System (EPSS) when submitting their full proposals that confirms the availability of the funds for the project.
- The information given in the pre-proposals regarding the research questions and objectives of a proposed project is binding. No major changes regarding the scientific content will be allowed by the CSC between the pre-proposals and full proposals. However, applicants will still have the possibility to make minor changes to improve their proposal as long as the objectives remain unchanged. Regarding the administrative details, a limited number of changes may be allowed by the FCP and/or CSC, provided they are in line with the general rules of the call and the rules of the Funding Organisations:
 - **Change of budget can be allowed by the relevant Funding Organisation.** The FCP can decide according to its own rules whether it needs a justification for it. There is no need to inform the Call Secretariat. Where relevant, before granting budget changes (in particular in case of increase), Funding Organisations should carefully consider their funding pressure at the end of Step 1.
 - **Changes in the consortium composition:**
 - **No change of Project Partner Coordinator (person in charge) will be allowed,** except in case of force majeure. A request of change of Project Partner Coordinator must be submitted to the Call Secretariat, at least one week before the deadline for submitting full proposals and it will be discussed on a case-by-case basis by the CSC.
 - **Changes in the consortium composition are allowed (maximum two changes of Partners), conditioned upon approval by the concerned Funding Organisations.** Please note that the following actions are considered as changes: **addition, removal, or replacement of a Partner (incl. self-financed Partners).** Please note that the maximum number of changes applies to “Partner”; it does not apply to “team member” or “subcontractors”.
 - In case of a removal of a Partner, consortia have to ensure that their consortium still includes the minimum number of required Partners. If this is not the case, the project will be declared ineligible and will not be evaluated.
 - All new Partners have to comply with their respective Funding Organisation’s rules.

In terms of procedure: The eligibility of new research Partners must be confirmed at least one week before the full proposal submission deadline. Changes must be asked to the FCP, with the Call Secretariat in copy, who needs to check the eligibility of the new Partner and agree with the change, before being implemented into the EPSS.

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Please note that the following cases are not considered as one of the maximum two changes allowed, although the procedure mentioned above remains the same:

- If the change is explicitly requested by a Funding Organisation after the eligibility decision at Step 1.
- If a researcher in charge (person) remains the same but changes the institutions (within the same country), provided the institution fulfils the eligibility criteria of the same Funding Organisation.
- If the institution remains the same but the researcher in charge (person) changes, provided the researcher in charge fulfils the eligibility criteria of the same Funding Organisation.
- **The change(s) should not change the substance of the proposal.** Applicants will have to indicate in their full proposal the changes made as compared to the pre-proposals (for information for the EvC and the Call Secretariat).
- If one Partner is not eligible, the whole proposal will be considered ineligible and will not be evaluated, unless the eligibility issue(s) can be fixed without changing the substance of the proposal.
- Applicants declared eligible after the first eligibility check cannot be declared ineligible after the second eligibility check, unless they made changes in their application justifying this change in eligibility status or failed to meet specific national/regional requirements.
- All proposals evaluated in Step 2 should be eligible to make sure all selected proposals can actually be funded.
- The aim of the call is to fund medium size projects (with a total budget of typically 1.2-1.5M€ on average; but note that this constitutes an indication rather than a formal limit). The requested funding should be justified and relevant with regards to the planned work within the project.
- The projects' duration is 3 years. Projects are expected to act as transnational project and not as a mosaic of national/regional projects; to this end, as far as possible, Partners should participate in the project for its entire duration. However, as needed, position of some team members can be requested for only part of the project's duration, as long as at least one member of each Partner remains involved for the whole project duration.

6. Review and evaluation procedure

The CSC will establish an EvC, comprising both scientific experts from natural sciences, technical sciences, social sciences and humanities, and policy/management experts. Experts composing the EvC will be referred to as “EvC members” hereafter.

The CSC will appoint two EvC co-chairs from the EvC members, one scientific co-chair and one policy/management co-chair. As far as possible, the EvC co-chairs will be selected from a country not represented within the CSC. Details on EvC appointment are described in [Annex 3](#).

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Suggested names for the co-chair positions that will not be selected by the CSC will be automatically included in the list of experts to be contacted as EvC members, unless Funding Organisations request otherwise.

A two-Step evaluation process will be organised:

- **STEP 1:** it will consist of an eligibility check of pre-proposals by the Call Secretariat and FCPs and an evaluation of pre-proposals by the EvC against the following criteria: fit to the scope of the call, novelty of the research and impact (Document 6 of [Annex 1](#)). The first two criteria (fit and novelty) will be evaluated by scientific EvC members while the third criteria (impact) will be evaluated by policy/management EvC members. Each proposal will be evaluated by 2 scientific members and 2 policy/management members from the EvC. The CSC will decide on the number of projects to be invited to Step 2, based on the list made by the members of the EvC and their explanations. Consortia that should not be invited to Step 2 receive a clear indication that based on their pre-proposal, their chance of being successful with a full proposal is very low in this high-competitive call. However, this is only a recommendation, a full proposal from a non-invited consortium cannot be formally rejected, solely because the consortium did not receive an invitation to Step 2.

The number of proposals invited to Step 2 will be determined considering the following elements:

- The CSC should invite a sufficient number of proposals to Step 2 to give them a fair chance of being funded;
- The expected financial pressure for some Funding Organisations;
- Feasibility of the evaluation process for the Call Secretariat to keep the evaluation process manageable;
- Measure to encourage participation and improve success of countries / regions with small research communities and/or where research applications have been less successful (see the section 2.1.3)

Applicants who will not submit a full proposal will receive the feedbacks from the EvC after the full proposal application deadline (the feedback per pre-proposal will gather feedbacks from both the scientific and policy/management rapporteurs). Applicants having submitted a full proposal will not receive feedback on their pre-proposal after Step 1; they will only receive feedback on their full proposals after Step 2. However, single generic feedback might be sent to all applicants invited to Step 2 (if deemed relevant).

No score nor rank will be communicated at any time to the applicants.

- **STEP 2:** it will consist of an eligibility check of full proposals by the Call Secretariat and FCPs and an evaluation of eligible full proposals by external reviewers and the EvC. Eligible full proposals will be evaluated by external reviewers and members of the EvC against the following criteria: (scientific) excellence, quality and efficiency of the implementation and impact. The first two criteria (excellence and implementation) will be evaluated by scientific EvC members and external reviewers while the third criteria (impact) will be evaluated by policy/management EvC members and external reviewers. Each proposal should be preferably reviewed by two external scientific reviewers and one external

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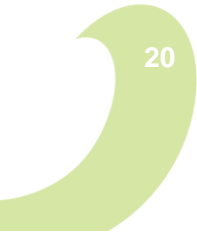
policy/management reviewer. External reviewers are suggested by the EvC, with the support of the Call Secretariat, and with a particular support of the co-chairs. If necessary, the Call Secretariat and the CSC will identify additional external reviewers. In case of an insufficient number of external reviews, the Call Secretariat is in charge of identifying additional external reviewers in agreement with the EvC members. If in spite of all efforts, the targeted numbers of external reviews cannot be reached for a significant number of proposals, the CSC will meet to decide how to handle this situation. The solutions will however have to meet the terms and conditions of each Funding Organisation. In addition to the external evaluation, each proposal will be evaluated by two scientific members and two policy/management members from the EvC. The EvC will convene to evaluate and make the final ranking of the submitted full proposals according to the assessment criteria defined and moderating the external reviews obtained. The final ranking list will be communicated to the CSC for final funding decision. Assessment criteria are specified in Document 6 of [Annex 1](#) and the details on the procedure are specified in [Annexes 3](#) and [4](#). After the funding decision, applicants will receive the feedbacks from the EvC on their full proposals (the feedback per full proposal will combine inputs from both the scientific and policy/management rapporteurs).

No score nor rank will be communicated at any time to the applicants.

In case very few proposals are received, the CSC can decide with absolute majority to invite all eligible consortia to submit a full proposal in Step 2 without organising an EvC in Step 1. Note however that the eligibility check will still be done in Step 1.

2.6.1. Anticipated time schedule

12 June 2024:	Pre-announcement of the call
3 September 2024, 1:00-2:30 PM CEST:	CSC meeting to appoint the co-chairs
10 September 2024:	Official launch of the call <ul style="list-style-type: none">- The call text must be sent at least 30 days before the official launch of the Call to EC (i.e., on 9 August 2024 max).- The call needs to remain open min. 60 days (i.e., until 8 November 2024 min.)
24 September 2024 (likely from 1:00 PM)	General Webinar to promote the call
8 November 2024, 3:00 PM CET	Deadline for submitting pre-proposal



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18 November 2024, 2:00-3:30 PM CET	CSC meeting to appoint the EvC
6 December 2024 at noon	First eligibility check completed by the Call Secretariat and CSC – STRICT DEADLINE
19 December 2024, 1:00-4:00 PM CET	CSC meeting to decide on the final eligibility decision
Late January/Early February 2025 (between Jan 21 and Feb. 5)	1st EvC meeting > Results of the first EvC meeting
6 February 2025, 1:00-4:00 PM CET	CSC meeting to decide on proposals invited in Step 2 > Results of the eligibility check and selection decisions sent to applicants (9 February 2024)
11 April 2025, 3:00 PM CEST	Deadline for submitting full proposals
5 May 2025	Second quick eligibility check completed by the Call Secretariat and FCPs
22 May 2025, 1:00-3:00 PM CEST	CSC meeting to complete the eligibility check
Late June/Early July 2025:	2nd EvC meeting > Ranked list of proposals established by the EvC
Mid-September 2025:	CSC meeting: Recommendation for funding projects > As soon as a relatively reliable statement is available and by late September, results of the possible funding decisions will be sent to applicants and the list of projects recommended for funding will be published on the Biodiversa+ website (acronym & title only), with a mention that this is pending final approval by the concerned Funding Organisations
14 November 2025	Deadline for CSC members to provide final approval of their funding commitments from their funding organisations > Official results of the final funding decisions sent to applicants and list of funded projects published on the Biodiversa+ website (title, acronym and involved countries)

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1 December 2025:	Earliest possible start of funded projects
1 April 2026:	Latest possible start of funded projects

2.6.2. Evaluation costs

The EvC should meet two times (physically or remotely):

- Once for the evaluation of the pre-proposals submitted at Step 1
- And once for the evaluation and ranking of full proposals submitted at Step 2.

Each EvC member will receive a fee that is fixed to a standard rate of 250 EUR per step of the evaluation process to which he/she participates (i.e. EvC members will receive 250 EUR for their participation in the evaluation of pre-proposals only, or in the evaluation of full proposals only; they'll receive 500 EUR if they participate in both Steps, i.e. evaluation of both pre-proposals and full proposals). In addition, each EvC member will receive 50 EUR for each pre-proposal he/she evaluates at Step 1 and 75 EUR for each full proposal he/she evaluates at Step 2.

The Co-chairs will receive a fee for their participation to the evaluation process that is fixed at a standard rate of 2,000 EUR.

These rates are net of any taxes (however, social charges apply), under the French applicable law. The fee will be paid by the French Foundation for Research on Biodiversity (FRB), as the entity hosting the Biodiversa+ core secretariat.

In addition, travel costs, accommodation, and meals for attending the EvC meetings (if physical ones) will be covered by the Call Secretariat located at ANR.

NB: The fees described above only concern proposals officially allocated to EvC members. They do not apply in case of spontaneous third readers.

2.6.3. Anonymity of EvC members and external reviewers

EvC members and external reviewers remain anonymous throughout the whole evaluation process, except to the Funding Organisations participating in the call. Information on the EvC and the CSC members who have suggested the names of external reviewers will be maintained in strict confidentiality by the Call Secretariat during and after the completion of the entire evaluation process.

The composition of the EvC will be made public only after the CSC has made its final decision about which projects are recommended for funding (without indication as to which members evaluated which proposal). The names of external reviewers won't be made public, even after the completion of the evaluation process (see Document 7 of [Annex 1](#)).

2.6.4. Conflict of interest / good scientific practice

The Funding Organisations decide to use their best endeavours to avoid conflicts of interest and to safeguard good scientific practice.



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The Code of Conduct related to Conflict of interest, confidentiality, and non-disclosure (Document 7 of [Annex 1](#)) applies to the CSC, independent observer, EvC and external reviewers.

Partners of the Biodiversa+ Partnership as well as CSC members and associated FCPs cannot participate in applications to the call. Participation of a Biodiversa+ Partners, CSC (or associated FCP) member to a proposal makes the proposal non-eligible.

Experts who participated in the process of drafting the call text are allowed to participate as a Partner in a proposal submitted to this call; they are however not allowed to apply as Project Partner Coordinator (i.e. main Principal Investigator) of a proposal.

2.6.5. Confidentiality and non-disclosure policy

All submitted proposals, the correspondence forwarded to the CSC, the reviews and the identity of the EvC members or external reviewers must be treated as strictly confidential. They must not be revealed to third parties.

If any Funding Organisation becomes aware that it will be required, or is likely to be required, to disclose Confidential Information in order to comply with national/regional applicable laws or regulations or with a court or administrative order, it should, to the extent it is lawfully able to do so but prior to any such disclosure notify the Call Steering Committee.

2.6.6. Mutual commitment of the Funding Organisations

Each of the Funding Organisation accepts to ensure the application of this MoU and promote the success of the collaboration.

Under this MoU the Funding Organisations expressly decide to negotiate with perfect good faith the terms of an agreement setting forth the terms and conditions of their collaboration.

Each Funding Organisation further accepts to refrain from any activity that could be harmful to the project throughout the term of the MoU.

7. Final funding decision (at Step 2)

The CSC decides on which projects to recommend for funding strictly following the final ranking list established by the EvC, taking into consideration that around the threshold some proposals considered of equal quality might be equally ranked by the EvC.

The Funding Organisations are aiming to fund as many of the highest ranked proposals as possible, following the funding model presented in [Section 1](#). Formal funding decisions are made by the Funding Organisations.

In case the CSC has to choose between proposals equally ranked, it should first aim at choosing the proposals that will allow to fund the maximum number of projects.

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The Call Secretariat will notify the applicants of the results of the evaluation process and send them the final feedbacks of the EvC members. No score nor rank will be communicated to the applicants. No oral or written information will be given by the Funding Organisations before the notification by the Call Secretariat.

After communication of the results, selected research Partners will enter into the administrative process with their corresponding Funding Organisations. Funding Organisations will coordinate the establishment of funding contracts with their respective funded Partners.

8. Funding procedure

- Funding of selected projects should start during the period 1 December 2025 – 1 April 2026 allowing to use 2025 and/or 2026 budget;
- Research Partners of successful project consortia will be funded directly by their respective Funding Organisations and funding will be administered according to the regulations of the respective Funding Organisations. In addition, the EC funding for the projects will be distributed through the Funding Organisations eligible to EC funding;
- Funding Organisations' procedures for joint programme funding will be made explicit to the Call Secretariat, CSC and applicants in order to avoid any unexpected delays or issues.

9. Follow-up, monitoring and evaluation / dissemination of results

Funded projects are required to provide **a mid-term report** (ca. 18 months) **and a final report** (ca. 36 months) on research and activity progress and financial aspects.

In addition, the administrative rules of the relevant Funding Organisation apply.

The mid-term and final reports will allow the Funding Organisations to monitor the implementation status of the research according to the initial work plan. The CSC decides about the form and questions of the mid-term and the final report. The mid-term and final reports will be assessed by a dedicated follow-up group, which composition will be decided by the CSC. The follow-up group will draft feedbacks on the mid-term and final reports to be sent to the concerned projects; these feedbacks will be sent to the CSC for information, discussion and formal approval before being sent to the concerned projects.

Funded projects are required to participate in activities that allow networking between the projects and the dissemination of the projects' results. This includes:

- a **kick-off meeting** at the beginning of the funding period,
- a **mid-term meeting** to present and discuss the mid-term reports
- a **final conference** to present and disseminate the project results at the end of the funding period.

These events will be possibly organised back-to-back with other workshops (such as clustering workshops, data management workshops, synthesis workshops, etc.)

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Applicants should include the costs for their participation in two physical meetings in the budgets of their proposals (at least one event will be done remotely), according to the terms and conditions of the relevant Funding Organisations.

Funded consortia will be requested to produce data management plans and to update these data management plans regularly with regard to current EU practices and national/regional regulations. In their data management plans, the funded consortia will be strongly encouraged to make available publicly the new databases, with metadata, they will have produced. Please note that funded consortia may also have to comply with specific requirements of their Funding Organisation in terms of open data / open science (for example certain funding organisations may request the sharing of data at the time of publication). Funded consortia are thus strongly encouraged to plan resources to ensure open access to the data of their project and comply with the requirements of their Funding Organisations in terms of open data.

The dissemination of the project outputs is the responsibility of the funded projects. Plans for dissemination of the results will form part of the proposals and are included in the evaluation procedure.

In addition, Biodiversa+ will help funded projects to make use of relevant knowledge transfer platforms (e.g. IPBES, Oppla, MAES, BISE, GBIF, etc.) and can also further disseminate key results of projects (e.g. through policy briefs, see: www.biodiversa.eu/actionable-knowledge/policy-briefs).

A funded project may request major changes during its lifetime (such as cost neutral project extension, change in the consortium (budget major changes, change in the consortium, etc.)). In any case, all requests of major changes will have to be approved by both the concerned funding organisations and the CSC. The concerned funding organisations implements the requested changes only after CSC approval.

10. General data protection regulation

Compliance with the EU General Data Protection Regulation 2016/679 will be ensured during the call process and lifetime of the Biodiversa+ funded projects, as defined in the Joint Controller Agreement (see [Annex 9](#) of the MoU, Standard Contractual Clauses (see [Annex 10](#) of the MoU) and Biodiversa+ Consortium Agreement.

3. Duration of the Memorandum of Understanding

This MoU will become effective as of the date of the last signature and will remain effective until the last final project report is approved, and the last payment to the funded projects is made.

4. Amendments

This MoU may be amended or modified by mutual written understanding of the signatories or their replacements. Amendments cannot have retroactive effects.

5. Language

This MoU is drawn up in English, the language that will govern all documents, notices, meetings and processes relative there to.

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

We the undersigned, do hereby have come to the terms and conditions specified in this MoU including:

[Annex 1:](#) Call documents:

Document 1: Announcement of Opportunity

Document 2: Pre-proposal application form

Document 3: Full proposal application form

Document 4: Checklist for applicants

Document 5: Open Science and Fair Data

Document 6: Assessment criteria

Document 7: Conflict of interest, confidentiality and non-disclosure policy

[Annex 2:](#) Terms of reference for Call Steering Committee

[Annex 3:](#) Instructions for the Call Secretariat

[Annex 4:](#) Information and guidelines for the Evaluation Committee

[Annex 5a:](#) Review forms for pre-proposals

[Annex 5b:](#) Review forms for full proposals

[Annex 6:](#) Information and guidelines for the co-chairs of the Evaluation Committee

[Annex 7a:](#) Information and guidelines for the scientific external reviewers

[Annex 7b:](#) Information and guidelines for the policy/management external reviewers

[Annex 8:](#) Guidelines for the independent Observer

[Annex 9:](#) Joint Controller Agreement

[Annex 10:](#) Standard Contractual Clauses

In case of conflicts between the Annexes and the core text of this MoU, the latter shall prevail.

6. Signatures

FONDS ZUR FÖRDERUNG DER WISSENSCHAFTLICHEN FORSCHUNG (FWF)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

SERVICE PUBLIC FEDERAL DE PROGRAMMATION POLITIQUE SCIENTIFIQUE (BeISPO)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

FONDS DE LA RECHERCHE SCIENTIFIQUE (FNRS)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

FONDS VOOR WETENSCHAPPELIJK ONDERZOEK-VLAANDEREN (FWO)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

BRAZILIAN NATIONAL COUNCIL OF STATE FUNDING AGENCIES (CONFAP)

Name: Odir Antônio Dellagostin

Title / position: President

Signature and stamp of the organisation:

DocuSigned by:
Odir A. Dellagostin
62043F1BF9B949F...

Date: 14/08/2024

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

BRAZILIAN NATIONAL COUNCIL FOR SCIENTIFIC AND TECHNOLOGICAL DEVELOPMENT (CNPq)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

BULGARIAN NATIONAL SCIENCE FUND (BNSF)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

TECHNOLOGY AGENCY OF THE CZECH REPUBLIC (TA CR)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

INNOVATION FUND DENMARK (IFD)

Name(s):

Title(s) / position: Acting Executive Vice President

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

SIHTASUTUS EESTI TEADUSAGENTUUR (ETAG)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

THE FAROESE RESEARCH COUNCIL (RCFI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

RESEARCH COUNCIL OF FINLAND (RCF)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

AGENCE NATIONALE DE LA RECHERCHE (ANR)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

GERMAN RESEARCH FOUNDATION (DFG)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

VDI/VDE INNOVATION + TECHNNIK GMBH (VDI/VDE-IT) - participating on behalf of BMBF

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

NEMZETI KUTATÁSI, FEJLESZTÉSI ÉS INNOVÁCIÓS HIVATAL (NKFIH)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

Icelandic Centre for Research (Rannis)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

Environmental Protection Agency (EPA)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

MINISTRY OF ENVIRONMENTAL PROTECTION (MoEP)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

MINISTRY OF UNIVERSITIES AND RESEARCH (MUR)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

AUTONOMOUS PROVINCE OF BOLZANO/BOZEN (BOZEN)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

LATVIAN COUNCIL OF SCIENCE (LZP)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisations:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

RESEARCH COUNCIL OF LITHUANIA (LMT)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

NATIONAL AGENCY FOR RESEARCH AND DEVELOPMENT (NARD)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

MINISTER OF HIGHER EDUCATION AND SCIENTIFIC RESEARCH AND INNOVATION (MESRSI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

NETHERLANDS ORGANISATION FOR SCIENTIFIC RESEARCH (NWO)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

RESEARCH COUNCIL OF NORWAY (RCN)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

NARODOWE CENTRUM NAUKI (NCN)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

FUNDO REGIONAL PARA A CIENCIA E TECNOLOGIA (FRCT)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

THE EXECUTIVE AGENCY FOR HIGHER EDUCATION, RESEARCH, DEVELOPMENT AND INNOVATION FUNDING (UEFISCDI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

SLOVAK ACADEMY OF SCIENCES (SAS)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

MINISTRY OF HIGHER EDUCATION, SCIENCE AND INNOVATION (MVZI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

DEPARTMENT OF SCIENCE AND TECHNOLOGY (DSI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

AGENCIA ESTATAL DE INVESTIGACIÓN (AEI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

Centre for the Development of Technology and Innovation (CDTI)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

FUNDACIÓN BIODIVERSIDAD (FB)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

**THE SWEDISH RESEARCH COUNCIL FOR ENVIRONMENT, AGRICULTURAL, SCIENCES, AND
SPATIAL PLANNING (FORMAS)**

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

SWISS NATIONAL SCIENCE FOUNDATION (SNSF)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

NATIONAL SCIENCE AND TECHNOLOGY COUNCIL (NSTC)

Name(s):

Title(s) / position: Director General

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)”

TUNISIAN MINISTRY OF HIGHER EDUCATION AND SCIENTIFIC RESEARCH (MHESR)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

**MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Changes
(BiodivTransform)”**

TÜRKİYE BİLİMSEL VE TEKNOLOJİK ARASTIRMA KURUMU (TÜBİTAK)

Name(s):

Title(s) / position:

Signature(s) and stamp of the organisation:

Date:

MoU of the 2024-2025 Biodiversa+ Call on “Transformative Changes (BiodivTransform)”
Annex 1: Call Documents

Annex 1: Call Documents



Annex 1 is a stand-alone, attached document. It encompasses all the Call Documents which will be made public on the [Biodiversa+ webpage of the call](#) upon the official launch on 10 September 2024.

Annex 2: Terms of Reference for the Call Steering Committee

I. Context and mission statement

In the context of the Partnership on biodiversity, joint transnational research and innovation funding calls will be launched, part of the implementation of the Partnership Strategic Research and Innovation Agenda (i.e. part of the Annual Implementation Plans). These calls will promote as needed collaboration between natural sciences, technical sciences, and social sciences and humanities, along with stakeholder engagement in the research projects.

On an à-la-carte basis, Partner Organisations of the Partnership, as well as other Funding Organisations will decide to participate in these calls. The Organisations participating in a joint call are defined as **Participating Funding Organisations**.

For each call, a **Call Steering Committee (CSC)** will be set up, gathering all the Participating Funding Organisations of a particular call. The Call Steering Committee is the decision-making body for all aspects related to the practical implementation and follow-up of the concerned call.

A **Call Secretariat** will be established at the beginning of the Partnership and adjusted if needed for each annual joint call. It will include the Working Area#1A Leader, the officer(s) in charge of the implementation of joint calls from the Operational Team and possibly other officers supporting on an ad-hoc and temporary manner the implementation of joint calls. It will be located at ANR; yet part of the Call Secretariat could be located at another Participating Funding Organisation (in particular for the ad-hoc / temporary officer). For the entire period of each call, the Call Secretariat will be in charge to prepare, coordinate and follow-up the joint call processes, both electronically and physically. It will work in cooperation and consultation with the Call Steering Committee and provide the CSC with all documents needed for decisions.

The calls to be launched in the context of the Partnership may be co-funded by the European Commission. In the context of co-funded calls, the European Commission will increase the available research budget for the call by providing additional funding to that made available by the European Commission-eligible Participating Funding Organisations.

Through their budget and – for co-funded calls – the use of the European Commission “top-up” funding for European Commission-eligible countries, the Participating Funding Organisations will strive to maximise the number of high-quality transnational research projects that can be funded through each joint call.

The call text, funding model and evaluation procedure to be applied within each call will be detailed in a Call Memorandum of Understanding, which will be developed and adopted for each call by the Call Steering Committee of the concerned call.

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II. Roles and specific responsibilities

The Call Steering Committee (CSC) is the main decision-making body for all aspects related to joint calls.

It meets to take all important decisions related to the implementation and follow-up of the joint call and may also take decisions remotely under certain circumstances specified under point IV.

The CSC, composed by all Funding Organisations who want to participate in the joint call using their budget, starts its work to prepare the Call MoU and ends when the final report of the last research project funded under the call is approved.

The CSC has the following responsibilities:

- Develops and approves the Call Memorandum of Understanding and the text of the Call Announcement;
- Mobilises relevant experts for such developments;
- Decides on the general eligibility of research Partners for funding based on the Call and Funding Organisations' eligibility rules;
- Provides names of potential experts to be part of the Evaluation Committee (EvC);
- Appoints the co-chairs of the Evaluation Committee (EvC);
- Appoints the members of the EvC;
- Schedules the EvC meeting(s) in cooperation with the Call Secretariat, the co-chairs of the EvC;
- Provides names of potential external reviewers to the Call Secretariat and EvC;
- Decides on which projects to invite to Step 2, based on the evaluation made by the EvC (in case a two-Step procedure is applied);
- Decides on which proposals to recommend for funding based on and not deviating from the list of ranked proposals established by the EvC;
- Recommends a start date and end date of the funded projects;
- Establishes a fall-back procedure in case of funding failure of one/several Participating Funding Organisations;
- Approves the composition of the follow-up group in charge of evaluating the mid-term and final reports of the funded projects
- Approves the mid-term and final reports, based on recommendation of the follow-up group, and associated final feedbacks to be sent to the funded projects.

Members of the CSC can attend the EvC meeting(s) as Observers (optional).

III. Composition

The Call Steering Committee (CSC) is composed of one mandated representative from each Participating Funding Organisation.

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In addition, the following actors are invited to attend CSC meetings as advisers, without a vote:

1. the Chairs Team
2. the officer(s) in charge of the implementation of joint calls, the Executive Director, and the Operational Manager of biodiversity monitoring and Research and the Operational Manager for Society and Policy Impact from the Partnership Operational Team

The CSC meetings are organised and chaired by the Call Secretariat.

IV. Meetings, working principles and voting procedures

The Call Steering Committee (CSC) can meet physically or virtually.

It will meet at least to take the following decisions:

- Adoption of the Call Memorandum of Understanding and the text of the Call Announcement (including the call text);
- Adoption of the Co-chairs of the EvC and composition of the EvC;
- Eligibility check after Step 1 (pre-proposals) and after Step 2 (full proposals);
- Decision on pre-proposals to be invited to Step 2 (in case a two-Step procedure is applied);
- Funding decision at Step 2;
- Approval of funded projects' mid-term and final reports, based on recommendation of the follow-up group.

Other meetings may be organised as appropriate to discuss and decide on other elements related to the implementation of joint calls.

The Call Secretariat shall announce the ordinary meeting to each Call Steering Committee Member no later than 21 days in advance, and shall prepare and send to each CSC Member an agenda no later than 7 days before the meeting.

The Call Secretariat shall also convene extraordinary meetings at any time:

- If there is an emergency situation, possibly upon informal request of any Participating Funding Organisation;
- Upon formal written request of at least 1/3 of the Participating Funding Organisations.

The Call Secretariat shall announce the extraordinary meeting to each Call Steering Committee Member no later than 7 days in advance, and shall prepare and send to each CSC Member an agenda no later than 3 days before the meeting.

The topics requesting a decision of the CSC shall be highlighted in the agenda in order to allow mandated representatives to get the position from their respective institutions before the meeting.

The CSC may validly meet if at least 1/2 of the voting members are present. In case this quorum is not met, the Call Steering Committee will be convened once again as needed within the following two months and may validly deliberate even in the absence of quorum.

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In principle, the CSC will work by consensus. If consensus cannot be reached, the following voting procedure is foreseen:

- Each Participating Funding Organisation present at the meeting has one vote;
- Defaulting Participating Funding Organisations, as defined under section V, may not vote;
- A member of the CSC cannot grant a power of attorney to another member to represent him/her.
- Decisions by the CSC shall be taken upon a qualified majority of at least 75% of the votes.

If a decision on major issues has to be made in between CSC meetings, the voting will proceed through an e-mail procedure giving Participating Funding Organisations a voting period of at least 10 days. Votes will be collected by the Call Secretariat. In that case, if at least 1/2 of the voting members participate to the vote, the same voting rules as stated above will apply.

For minor decisions acceptance by silence may be used. For such decision, the Call Secretariat will make clear what decision will be considered as accepted in case no objections are received.

Written minutes of each CSC meeting will be produced by the Call Secretariat which includes the formal record of all decisions taken. The minutes shall be sent to all CSC Members within 5 weeks after the meeting. The minutes shall be considered as accepted if, within 14 days from sending, no CSC Member has sent an objection in writing to the Call Secretariat, with respect to the accuracy of the minutes.

V. Internal settlement of dispute, failure to honour funding commitment and breach of Obligation

Internal settlement of dispute

Participating Funding Organisation shall endeavour to settle their disputes amicably.

If a dispute emerges among Call Steering Committee Members, the following process shall be implemented:

1. If possible, discussion between the concerned Participating Funding Organisations, the Coordination Team and the Call Secretariat should be undertaken.
2. As needed, the Chairs Team can propose a solution to be discussed and if possible agreed on by the CSC.
3. If, however, no settlement of dispute has been possible to achieve, the concerned Participating Funding Organisations should refer to the jurisdiction of the competent administrative court in Brussels.

Failure to honour funding commitment

In the implementation of joint calls, each Participating Funding Organisation shall honour its commitment to respect the rules identified in the Call MoU and to fund research teams in the projects selected by the CSC to be funded. This implies to accept the outcome of the selection procedure decided by the CSC

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and to not use any national/regional evaluation of the projects which might modify the decision to fund the research Partners part of the selected projects.

In case of failure from a Participating Funding Organisation to honour its commitment, and except for a case of force majeure, a fall-back procedure will be applied by the CSC as defined in the Call MoU and the Participating Funding Organisation(s) concerned by the failure may be considered to be in Breach of its Obligation by the CSC (see next section). In addition, the Chairs Team of the Partnership can decide to initiate a termination procedure for the membership of the Participating Funding Organisation by applying the Defaulting procedure planned in the Terms of References of the General Assembly.

Breach of Obligation

In the event that the CSC identifies a breach by a Participating Funding Organisation of its obligations under the Call MoU, the Call Secretariat or, if the Call Secretariat is in breach of its obligations, a Participating Funding Organisation appointed by the CSC, will give written notice to such Participating Funding Organisation requiring that such breach be remedied within 30 calendar days from the date of receipt of the written notice by the Call Secretariat or Participating Funding Organisation.

If such a breach is substantial and is not remedied within that period or is not capable of being remedied, the CSC may unanimously decide to declare the Participating Funding Organisation to be a Defaulting Participating Funding Organisation and to decide on the consequences thereof, which may include termination of its participation in the call.

A Defaulting Participating Funding Organisation shall bear any reasonable and justifiable additional costs incurred by any other Participating Funding Organisation in order to perform its tasks.

VI. Conflict of interest

Definition of the conflict of interest.

The following situations will automatically be considered as conflict of interest:

- Being involved in (the preparation of) any pre- and/or full proposal;
- Having submitted a proposal as a principal investigator or a team member, under the call;
- Being director, trustee or Partner or in any way involved in the management of an applicant;
- Being employed or contracted by one of the applicants;
- Having close professional proximity, e.g. being a member of the same scientific institution with a hierarchical or department relation or impending change of the reviewer/EvC member to the institution of the applicant in a position with a hierarchical or department relation or vice versa;
- Having close family ties (spouse, domestic or non-domestic Partner, child, sibling, parent etc.) or other close personal relationship with the applicants of the proposal;
- Having (or having had during the last five years) a close scientific collaboration with an applicant of the proposal;

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- Having (or having had) a relationship of scientific rivalry or professional hostility with an applicant of the proposal;
- Having (or having had), a mentor/mentee relationship with the principal investigator of the proposal;
- Having a current or prior (past five years) activity in advisory bodies of the applicant's institution, e.g. scientific advisory boards;
- Having direct or indirect benefit if any proposal submitted is accepted or rejected;
- Having personal economic interests in the funding decision.

Rules for the prevention of conflict of interest

- CSC members have to sign a conflict of interest, confidentiality and non-disclosure code of conduct to confirm that they will comply with the principles stated in the present section VI.
- CSC members cannot participate in applications to the call and/or members of organisations that benefit from the call (would it be in-kind or in-cash) cannot be part of the CSC. Participation of a CSC member to a proposal makes the proposal non-eligible.
- CSC members must inform the Call Secretariat about any possible conflict of interest they have in the context of a joint call. During EvC meetings, CSC members must leave the room during the discussion of a proposal in case of a possible conflict of interest.

VII. Confidentiality and non-disclosure policy

All submitted pre- and full-proposals, the correspondence forwarded to the CSC, the reviews submitted by the EvC members and external reviewers, the identity of the EvC members and external reviewers and the mid-term and final reports of the funded projects must be treated as confidential according to the rules accepted in the Call MoU. They must not be revealed to third parties.

The submitted research pre- and full- proposals and ideas herein may not be exploited for personal or other scientific or commercial purposes.

VIII. Compliance with GDPR and Joint Controlling of Data

For each call, the Participating Funding Organisations have to conclude the contracts necessary to comply to the General Data Protection Regulation⁴ (GDPR) and allowing joint controlling of Data, namely:

- A Joint Controller Agreement (JCA) for all participating Funding Organisations, and
- A Standard Contractual Clauses (SCC) for non-EU and non-EEA Countries, not offering an adequate level of data protection according to the European Commission.

These two contracts have to be signed together with the Call Memorandum of Understanding defining the procedure to be used in each call. The Participating Funding Organisations are in charge of making sure these contracts are signed in time in order to be able to participate in a concerned joint call. Should

⁴ [Regulation \(EU\) 2016/679](#)

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a Funding Organisation base the third country transfer on another legal basis than SCC, it is sufficient to sign the JCA together with the Call Memorandum of Understanding.

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Annex 3: Instructions of the Call Secretariat

I. GENERAL

This document gives an overview of the practical aspects of the Biodiversa+ joint call on “Biodiversity and Transformative Change (BiodivTransform)”. It describes the procedures to be followed from the launch of the call until the evaluation phase, as accepted by the Funding Organisations, as well as the mandate of the Call Secretariat. It will serve as a guideline for the Call Secretariat.

Instructions for the Evaluation Committee are described in a separate document ([Annex 4](#)).

II. MANDATE OF THE CALL SECRETARIAT

The Call Secretariat will coordinate the call process with involvement (either electronically or physically) of staff from Funding Organisations.

The procedures to be followed by the Call Secretariat are described in this document.

Responsibilities of the Call Secretariat include:

- Preparing the documents required for the call implementation;
- Preparing the launch of the call (prepare all documents to be published on the Biodiversa+ website for the launch of the call, including the FAQ) and making sure the information on the website is updated all along the call process;
- Coordinating the Funding Organisation Contact Points and making sure the eligibility check is performed in due time;
- Establishing the EvC together with the CSC;
- Establishing a list of external reviewers with the CSC and EvC;
- Supporting the CSC and the EvC during the evaluation procedure, by:
 - Checking the overall eligibility of the proposals and collecting the eligibility decision of the Funding Organisations, with support from the FCPs;
 - Assisting the CSC in proposing potential external reviewers;
 - Assisting the EvC in proposing external reviewers and assigning them proposals;
 - Allocating proposals to EvC members (*rapporteurs and readers*);
 - Organising the EvC meetings and inviting CSC members as observers;
 - Gathering scores and reviews from the EvC members;
 - Circulating information to the CSC at each single Step of the procedure.
- Organising the CSC meetings, for the acceptance of the present Memorandum of Understanding, the evaluation process to be followed, the selection of pre-proposals to be invited to Step 2, the funding decision, and then for the monitoring of the funded projects;
- Coordinating the funding of the projects recommended for funding, and in case of funding failure, implementing the re-evaluation procedure decided by the CSC;

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- Informing applicants about the funding recommendations and sending them the final feedbacks made by the EvC on their proposal;
- Providing support for the organisation of the projects' follow-up events (kick-off, mid-term and final meetings)

A follow-up team based at TA CR will be in charge of the follow-up and monitoring of projects funded through this Biodiversa+ call, including:

- Organising the follow-up meetings (kick-off, mid-term and final meetings) of the funded projects;
- Organising the follow-up of the selected projects (i.e. collecting the interim and final reports, organising mid-term and final review, inform the applicants about the feedbacks from the mid-term and final review).

III. COORDINATION OF THE FUNDING ORGANISATION CONTACT POINTS

Before the launch of the call, each Funding Organisation has to:

- Send to the Call Secretariat their Funding Organisations' rules, following the template provided by the Call Secretariat. These rules will be made available on the Biodiversa+ website for the applicants.
- Indicate a contact person, whom the applicants can contact to have information on the call and on the Funding Organisations' rules and procedures.

IV. GUIDELINES TO ESTABLISH THE EVALUATION COMMITTEE

The EvC will consist of scientific experts from natural, technical, and social sciences and humanities, as well as policy/management experts relevant to the Call. The EvC composition should allow to cover, as far as possible, the range of topics within the scope of the call.

For the scientific EvC members, particular attention should be paid to the balance between natural, technical, and social sciences and humanities when establishing the EvC, with respect to the proportions in the project applications.

Guidance on what is a policy/management expert (for both EvC and external reviewers)

The EvC and external reviewers include experts in policy or management of biodiversity and natural resources which are able to evaluate the credibility and means presented by a research proposal in achieving expected societal impacts, including policy impacts. These policy and/or management experts should either be:

- **Non-academic experts with an experience of working with or within academic research projects.** They can have a background and/or experience in e.g. managing and/or using natural

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resources in the field, or from a business, policy-making or policy advising perspective, or be civil servants from global to local administrations.

- **Academic experts with extensive and demonstrable/justifiable experience in engaging non-academic stakeholders and promoting societal impacts, including policy impacts, of research.**

Policy and/or management experts for the evaluation of this Biodiversa+ call should NOT be:

- Non-academic experts without any prior knowledge of or experience with academic research projects in their career.
- Academic experts with no or only superficial experience of stakeholder engagement or promoting non-academic impacts of research. Social scientists, including in management and policy sciences, do not a priori satisfy the conditions for becoming a policy and/or management expert for the evaluation of this Biodiversa+ call. Evaluating social sciences in proposals is the responsibility of the scientific evaluation panel.

Co-chairs

The Co-chairs of the EvC are suggested by the CSC members and are appointed by a consensus of the CSC. One co-chair of the EvC is a scientific expert, and one co-chair is a policy/management expert; both should have experience in chairing large groups (including online meetings). As far as possible, the Co-chairs should be from a country that does not participate in the call. As far as possible, the choice of the Co-chairs of the EvC will take gender balance into account.

Each CSC member should suggest maximum 2 scientific experts and maximum 2 policy/management experts to be co-chairs of the EvC. Only 1 out of the maximum 4 names should be from a country participating in the call.

Composition of the rest of the EvC

According to the needs for expertise foreseen, each CSC member has to provide (mandatory) a minimum of 2 and a maximum of 6 names of scientific experts and a minimum of 2 and a maximum of 6 names of policy and management experts they recommend to be part of the EvC.

As far as possible, at least half of the suggested scientific and policy/management experts should be from non-participating countries.

These suggestions should be made prior to the pre-proposal submission deadline, while the final Evaluation Committee will be appointed after the pre-proposal submission in order to guarantee that any possible conflict of interest is avoided.

Funding Organisations can request that a member of the board of their Funding Organisations be part of the EvC.

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Based on the suggestions of the CSC, the Co-chairs of the EvC suggest a composition for the EvC to the CSC, with attention to the relevance of their expertise for this particular call and balance in the field of expertise according to the research questions addressed by the submitted proposals.

If the co-chairs identify some gaps among the suggested experts (in terms for e.g., of expertise, academic disciplines, geographic representation, etc.), the Call Secretariat may ask the Biodiversa+ Advisory Board and Enlarged Stakeholder Board, and the CSC for additional suggestions.

In the end, the final composition of the EvC is approved by the CSC.

As soon as the submission of pre-proposal is closed, the Call Secretariat provides the CSC with general statistics and information about the foreseen ecosystems studied, geographical range, disciplines of the projects and provisional budget requests per project Partner.

Recommendations for the composition of the EvC

When composing the EvC, the top priority should be to ensure that all major topics of the call are covered by members with high expertise in the field. Besides the following other aspects shall be considered, as far as possible.

- A particular effort in setting up the EvC will be made to ensure the gender balance among the EvC members, with the objective to have at least 40% of one gender.
- A particular effort will be also made to ensure a good geographical balance. Besides, as far as possible, participation from scientific members from countries not participating in the call will be favoured to allow further flexibility in case of conflicting interests.
- For scientific EvC members from participating country, there will be as far as possible maximum one scientific EvC member per participating country.
- Scientific EvC members will not, as far as possible, evaluate proposals involving teams from the country where they are based. This limitation does not apply to policy/management members of the EvC. In any case, both scientific and policy/management members will not evaluate proposals with which they have declared a conflict of interest.
- The number of EvC members is not fixed, as it is linked to the number of submitted proposals. Yet, as far as possible:
 - For plenary meetings, the size of the EvC should not exceed 35 people to keep the discussion manageable during EvC meetings;
 - As far as possible, members from the EvC should not evaluate more than 30 pre- more than 20 full proposals (both as rapporteur and reader);
 - This may lead to having scientific EvC members and policy/management EvC members meeting separately for the evaluation of pre-proposals and full proposals, in particular if the Evaluation Committee meeting is organised remotely.
- Members take part in the Evaluation Committee as independent experts and do not represent any organisation nor can they send any replacements.

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V. GOOD PRACTICE AND CONFLICT OF INTEREST

A code of conduct has been drafted to ensure good practice and avoid conflict of interest (Document 7 of [Annex 1](#)). These guidelines apply to the EvC, the external reviewers and the independent observer.

The Call Secretariat make sure that all CSC and FCPs, EvC members, external reviewers, and the independent observer sign the code of conduct for conflict of interest, confidentiality and non-disclosure (online signature, via the EPSS).

VI. GUIDELINES FOR THE EVALUATION PROCEDURE

1. Eligibility check of pre-proposals and evaluation of pre-proposals (1st Step)

a. Eligibility Check

After the pre-proposals are received, an eligibility check is performed by the Call Secretariat and FCPs.

- FCPs are in charge of checking the eligibility of all the applicants requesting funds from their Funding Organisation and to enter their eligibility decision in the EPSS
- The Call Secretariat is in charge of collecting the eligibility decisions by the FCPs and checking that submitted proposals follow the general call requirements (proposals submitted by the deadline, written in English, length of the proposal, minimum number of Partner, and participation of Project Partner Coordinator in only one proposal with a role of Coordinator).

Pre-proposals that do not meet the requirements and that are declared ineligible are rejected and are not evaluated, unless the eligibility issue(s) can be fixed without changing the substance of the proposal.

b. Peer review of pre-proposals

Pre-proposals passing the eligibility check will be sent to the Evaluation Committee for a first evaluation according to the 3 following criteria: fit to the scope of the call, novelty of the research and impact (see Document 6 of [Annex 1](#) for a more detailed information about assessment criteria).

Allocation of proposals to EvC members

The Co-chairs of the EvC and the Call Secretariat work together to assign pre-proposals to members of EvC, if needed with the help of the EvC members. To guarantee the quality of discussions and of the evaluation process, for each proposal there will be:

- two scientific members nominated within the EvC to review the pre-proposals according to the criteria ‘Fit to the scope of the call’ and ‘Novelty of the research’, one as rapporteur and one as reader, and
- two policy/management members nominated within the EvC to review the pre-proposal according to the criterion ‘Impact’, one as rapporteur and one as reader.

Evaluation of pre-proposals and EvC meeting

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Pre-proposals will be evaluated according to three criteria: Fit to the scope of the call, novelty of the research and impact. While the first two criteria (fit to the scope of the call and novelty of the research) will be evaluated by scientific members of the EvC, the last criterion (impact) will be evaluated by the policy/management members of the EvC.

The EvC will meet to establish the ranking list of pre-proposals.

Prior to the EvC meeting, the EvC members are requested to provide a written pre-assessment of the proposals assigned to them using the relevant criteria, preferably no later than one week prior to the EvC meeting.

The Call Secretariat will bring support if needed during the meeting. In addition, all CSC members and the Biodiversa+ Coordinator & Secretariats should be invited by the Call Secretariat to attend the Evaluation Committee meetings as observers.

In case a very large number of pre-proposals is received, scientific EvC members and policy/management EvC members may meet separately, in order to ensure that the size of the EvC in each sub-panel does not exceed 35 people for the majority of the discussion, and while ensuring that EvC members do not evaluate more than 30 pre-proposals (both as rapporteur and reader). Besides, some proposals (e.g. not fitting the scope of the call or highly and/or poorly scored with a consensus of scores) may not be discussed during the EvC meeting if all EvC members so decide.

In that case, the scientific and policy/management members will first meet separately to convene the score they want to give to each proposal for their respective criteria. They will then meet in plenary to decide on one final score to be given to each proposal, without having the possibility to change the scores given in sub-panel.

Aggregation of scores and ranking of pre-proposals

During the meeting, for each proposal, scientific and policy/management members discuss the quality of the proposals. Scientific members have to decide if the proposals fit to the scope of the call and decide on a score for all pre-proposals for the criterion “Novelty of the research’ while policy/management members have to decide on a score for all pre-proposals for the criterion ‘Impact’.

The final score will correspond to an aggregation of the scores given to the two criteria ‘Novelty of the research’ and ‘Impact’ (equal weight for the 2 criteria; final score out of 10 points).

The EvC ranks the pre-proposals based on their scores and assigns them to one of the following three categories:

- “A” very favourable for invitation to Step 2;
- “B” could be invited to Step 2;
- “C”, not favourable for invitation to Step 2.

As needed, and if deemed relevant, the EvC can differentiate proposals within group B (i.e. define sub-groups within group B).

Decision on the pre-proposals invited to Step 2

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The CSC will decide on the projects to be invited to submit full proposals, based on these categories established by the EvC.

A meeting of the CSC will be organised (either electronically or physically) to decide on the number of proposals to be invited to Step 2. The number of proposals invited to Step 2 will be determined considering the following elements:

- The CSC should invite a sufficient number of proposals to Step 2 to give them a fair chance of being funded;
- The expected financial pressure for some funding organisations;
- Feasibility of the evaluation process for the Call Secretariat to keep the evaluation process manageable.

If proposals within group B have been divided into sub-groups by the EvC, the CSC can decide to either (1) invite all pre-proposals within group B to Step 2, or (2) to only invite some of these pre-proposals to Step 2 by strictly following the order of sub-groups B.

If needed, the CSC might decide to add selection criteria (e.g. maximum oversubscription factor, etc.), in particular in case of situations that could jeopardise the success of the call.

Only applicants of the selected pre-proposals will be invited to submit full proposals by the Call Secretariat.

The information given in the pre-proposals regarding the research questions and objectives of a proposed project is binding. No major changes regarding the scientific content will be allowed by the CSC between the pre-proposals and full proposals. However, applicants still have the possibility to make slight changes to improve their proposal as long as the objectives remain unchanged. A limited number of changes in budget and consortium composition is allowed (see Document 1 of [Annex 1](#) for more information). The changes made will have to be declared in the full proposal.

c. Financial adjustment

If the financial pressure for a country is too high, negotiations will take place with the Funding Organisation representing this country/region to see if:

- The concerned country/region can increase its budget allocated to the call and thus reduce the financial pressure and/or;
- Ask the applicants to reduce their requested budget and/or set out a maximum of funding per research teams or per proposals in the Funding Organisation eligibility rules.

2. Evaluation of full proposals (2nd Step)

a. Eligibility check of full proposals

An eligibility check of full proposals is performed by the Call Secretariat and FCPs.

- FCP are in charge of checking the eligibility of all the applicants requesting funds from their Funding Organisation and to enter their eligibility decision in the EPSS

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- The Call Secretariat is in charge of collecting the eligibility decisions by the FCPs and checking that submitted proposals follow the general call requirements (proposals submitted by the deadline, written in English, length of the proposal, minimum number of Partner, and participation of Project Partner Coordinator in only one proposal with a role of Coordinator).

Applicants declared eligible after the first eligibility check cannot be declared ineligible after the second eligibility check, unless they made changes in their application justifying this change in eligibility status or failed to meet specific national/regional requirements.

Full proposals that do not meet the requirements and that are declared ineligible are rejected and are not evaluated, unless the eligibility issue(s) can be fixed without changing the substance of the proposal.

b. Assignment of proposals to external reviewers

The proposals are sent to:

- scientific external reviewers, who report on the sets of criteria on “excellence” and “quality/efficiency of the implementation”, and;
- policy/management external reviewers, who report on the sets of criteria on “impact”

Each proposal is preferably reviewed by two external scientific reviewers and by one external policy/management reviewer.

The Call Secretariat will endeavour as far as possible to collect the same number of external reviews for all proposals.

External review process:

- Reviewers are recommended by the EvC. If necessary, the Call Secretariat identifies additional reviewers and mobilise the CSC as much in advance of the deadline as possible to provide suggestions of reviewers when there are missing reviews. As needed, the Call Secretariat may also ask the Biodiversa+ Advisory Board and Enlarged Stakeholder Board for additional suggestions.
- In the proposals, the participants are invited to give the names of reviewers they do not want to be reviewed by and the names of 4 potential reviewers they consider most relevant to review their proposal: the EvC members and Call Secretariat are recommended to assign them after checking for potential conflicts of interest (in case of conflict, the whole list will be neglected).
- The Call Secretariat can allocate at least two proposals per external reviewer, if possible and accepted by the external reviewer.
- In case the number of external reviewers for a proposal is reached, the Call Secretariat will reallocate the remaining suggestion(s) of reviewers to other proposal(s), where relevant.
- The external reviews should be provided to the EvC two weeks before the evaluation meeting, where possible.

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- The rules for conflicts of interest should be followed (Document 7 of [Annex 1](#)), and scientific external reviewers based in the same country as the teams carrying the proposal should be avoided, as far as possible. This limitation does not apply to policy/management external reviewers.
- EvC members are asked to inform the Call Secretariat as soon as possible if they identify an external review of poor quality (i.e. an external review for which the rationales supporting the evaluation are not clear, not enough detailed or not in relation with the concerned assessment criteria). In such a situation, the Call Secretariat will - as far as possible - contact the external reviewer to request an improvement of this external review and/or find a replacement to this external review with the help of the rapporteur and reader and if necessary delete the poor-quality review from the list of reviews submitted.

The external reviewers are individuals who are qualified to evaluate a research proposal by virtue of his/her scientific background and/or knowledge of broader aspects relevant to the evaluation process.

Reviewers should be clear, but polite and tactful, and have to provide sufficient information to enable both the applicants and the members of the EvC to understand why particular scores had been assigned.

c. Evaluation Committee meeting

a) Preparation of the Evaluation Committee meeting: re-allocation of proposals to the EvC members and suggestions of external reviewers

Between Step 1 and Step 2, the composition of the Evaluation Committee might slightly change. The CSC members, the Co-chairs and Call Secretariat can make suggestions for changes. The final changes should be approved by the CSC.

The Co-chairs of the EvC and the Call Secretariat work together to re-allocate full proposals to members of EvC, based on the list of pre-proposals invited to Step 2. This should be done as quickly as possible after the list of pre-proposals invited to Step 2 is known.

For each proposal there will be two scientific members and two policy/management members within the EvC nominated to review the proposals, one as rapporteur and one as reader, to guarantee the quality of discussions and of the evaluation meeting.

Following the allocation of full proposals to EvC members, the rapporteur and reader will be invited to suggest names of external reviewers for the proposals assigned to them.

As far as possible, EvC members will receive external reviews sufficiently in advance of the meeting to allow time for any objections to be made on the reviewers' work and nominate potential replacements.

Prior to the EvC meeting, the EvC members (rapporteur and reader) are requested to provide a written pre-assessment of the proposals assigned to them using the relevant criteria, preferably no later than one week prior to the evaluation meeting. This pre-assessment should take into account and moderate the different scores and assessment received by the external reviewers.

b) Organisation of the Evaluation Committee meeting

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The EvC meets to establish the final ranking list of proposals.

The Call Secretariat will bring support if needed during the meeting. In addition, all CSC members and the Biodiversa+ Chairs Team and Operational Team should be invited by the Call Secretariat to attend the Evaluation Committee meetings as observers.

For each proposal, scientific and policy/management members discuss the quality of the proposals, taking into account their own review and moderating the external reviews received to give a score to the different criteria. Yet, some proposals (e.g. not fitting the scope of the call or highly and/or poorly scored with a consensus of scores) may not be discussed during the EvC meeting if all EvC members agree.

In case of a very large number of full proposals, in case of a remote Evaluation Committee meeting, or in case the CSC so decides due to other reasons, scientific EvC members and policy/management EvC members may meet separately, in order to ensure that the size of the EvC in each sub-panel does not exceed 35 people for the majority of the discussion, and while ensuring that EvC members do not evaluate more than 20 pre-proposals (both as rapporteur and reader).

In that case, the scientific and policy/management members will first meet separately to convene the score they want to give to each proposal for their respective criteria. They will then meet in plenary to decide on one final score to be given to each proposal, without having the possibility to change the scores given in sub-panel.

Assessment of the excellence and quality/efficiency of the implementation criteria:

The scientific rapporteur and reader argue if the proposal fits the scope of the call. Proposals not fitting the scope of the call won't be further discussed.

The scientific rapporteur and reader also have to discuss and decide on a final score for the two criteria they evaluated: “excellence” and “quality/efficiency of the implementation” based on the moderation of the reviews made by the rapporteur, the reader and external reviewers, and after discussion in the panel.

The rapporteur must provide a written explanation of the evaluation results for all his/her proposals (final feedback) to be sent to the applicants and to be used by the CSC. No score nor rank will be communicated at any time to the applicants.

Assessment of the impact criteria:

The policy/management rapporteur and reader discuss and decide on a final score for the criterion they evaluated “impact”, based on the moderation the reviews made by the rapporteur, the reader and external reviewers and after discussion in the panel.

The rapporteur must provide a written explanation of the evaluation results for all his/her proposals (final feedback) to be sent to applicants and to be used by the CSC. No score nor rank will be communicated at any time to the applicants.

Final ranking:

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The overall aim of the ranking system is to allow a transparent ranking that still allows for some flexibility, and to fund as many high-level projects as possible.

In order to do this, the final score given to a proposal will correspond to an aggregation of the scores given to the three criteria, taking into account their respective weights:

- 7 for excellence;
- 3 for implementation, and
- 6 for impact.

The overall score will be transformed into a score out of 15 points.

The EvC ranks as many projects as possible. However, the EvC can consider that proposals with a same final score that it considers of equal quality should be equally ranked.

The Evaluation Committee is asked to provide a written summary to explain its decisions to the CSC. For the proposals regarded “fundable”, the Evaluation Committee is invited to give advice, when possible, on the suitability of the budgets and possibilities for budget cuts, and on the importance for the entire undertaking of each task or work package in the collaborative projects.

VII. CSC meeting – Funding Meeting

The CSC meets after the EvC meeting and decides on the projects to be recommended for funding strictly following the final ranking list established by the EvC, taking into consideration that some proposals considered of equal quality might be equally ranked around the threshold by the EvC.

The CSC will determine the total number of projects to be recommended for funding according to the ranking made by the EvC, its advice and taking into account the Funding Organisations’ budgets and additional EC co-funding available.

The CSC will endeavour to fund the highest possible number of top ranked proposals.

In case the CSC has to choose between proposals equally ranked, it should first aim at choosing the proposals that will allow to fund the maximum number of projects.

Funding possibilities will depend on available budgets of individual Funding Organisations, the European Commission co-funding, and the different levels of flexibility in funding described in the funding model section of the Core MoU.

The Funding Organisations will synchronise communication of the result to applicants. In particular, no oral or written information will be given before the notification by the Call Secretariat.

Once the applicants have been notified by the Call Secretariat of the funding recommendations and these recommendations are formally approved by each Funding Organisation, the successful applicants will be contacted by their Funding Organisation regarding the award process and will enter into the administrative process with their respective Funding Organisations.

Each Funding Organisation funds and administers the awards made by their respective Funding Organisation.

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All the research teams involved in a same project should as much as possible have the same contract start and end dates.

VIII. Monitoring and evaluation of funded projects

The Call Secretariat supports the CSC to coordinate the funding of the projects. In case of funding failure from one Funding Organisation, the Call Secretariat implements a re-evaluation procedure, based on the decision of the CSC.

TA CR will be in charge of the follow-up of the funded projects.

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Annex 4: Information and guidelines for the Evaluation Committee

You were nominated to become a member of the Evaluation Committee (EvC) of the Biodiversa+ joint call for proposals. Your role will be as a scientific or policy/management expert in your field of experience rather than as a representative of any organisation or nation. You cannot send any replacement.

The Biodiversa+ network thank you very much for your interest in this joint call and for your willingness to participate in the evaluation procedure.

Each EvC member will receive a fee that is fixed to a standard rate of 250 EUR per step of the evaluation process to which he/she participates (i.e. EvC members will receive 250 EUR for their participation in the evaluation of pre-proposals only, or in the evaluation of full proposals only; they'll receive 500 EUR if they participate in both Steps, i.e. evaluation of both pre-proposals and full proposals). In addition, each EvC member will receive 50 EUR for each pre-proposal he/she evaluates at Step 1 and 75 EUR for each full proposal he/she evaluates at Step 2.

The Co-chairs will receive a fee for their participation to the evaluation process that is fixed at a standard rate of 2,000 EUR.

These rates are net of any taxes (however, social charges apply), under the French applicable law. The fee will be paid by the French Foundation for Research on Biodiversity (FRB), as the entity hosting the Biodiversa+ core secretariat.

In addition, travel costs, accommodation and meals for attending the EvC meetings (if physical ones) will be covered by the Call Secretariat.

NB: The fees described above only concern proposals officially allocated to EvC members. They do not apply in case of spontaneous third readers.

NB: Please note that you cannot be a member of the EvC if you are involved in a proposal submitted to the call. In case you were invited while you are involved in a proposal within the present call, please let the Call Secretariat know as soon as possible.

NB: Please note that all documents you will receive during the evaluation process are strictly confidential

I. OVERVIEW OF THE EVALUATION PROCEDURE & YOUR ROLE IN THIS EVALUATION PROCESS

Within this call, a two Step evaluation process will be implemented, as follows:

- The first Steps will consist in an eligibility check by the Call Secretariat and Funding Organisations Contact Points (FCP) and evaluation of pre-proposals by the EvC;
- The second Step will consist in an eligibility check and an evaluation of full proposals by external reviewers and the EvC.

A. EVALUATION OF PRE-PROPOSALS (STEP 1):

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The first Step will consist in an eligibility check and a first evaluation of pre-proposals by the EvC. Pre-proposals will be evaluated by the Evaluation Committee against the following criteria: fit to the scope of the call, novelty of the research and impact. Only successful pre-proposals will be invited to submit full proposals.

Allocation of pre-proposals to EvC members

The Call Secretariat allocates the proposals to the EvC members with their help. Each proposal is assigned to:

- 2 scientific EvC members (one acting as rapporteur, and one as reader);
- 2 policy/management EvC members (one acting as rapporteur, and one as reader).

Evaluation of pre-proposals and EvC meeting

Scientific EvC members will assess the two following criteria: ‘fit to the scope of the call’ and ‘novelty of the research’, while the policy/management EvC members will assess the criterion ‘impact’ (see Document 6 of [Annex 1](#)). Please note that the feasibility of a project *per se* (incl. methodological feasibility and risk management) should not be evaluated at Step 1 as applicants may not have enough room to sufficiently detail the underlying methods of their project. The quality of the project implementation and structure (including complementarity of the consortia) should not be evaluated at Step 1, this aspect will be assessed for full proposals only (Step 2).

During the EvC meeting, for each proposal:

- Scientific and policy/management EvC members discuss the quality of the proposals. Scientific EvC members have to decide (i) if pre-proposals ‘Fit to the scope of the call’ and (ii) on a score for the criterion ‘Novelty of the research’ (threshold: 3)
- Policy/management EvC members have to decide on a score for pre-proposals for the criterion ‘Impact’ (threshold: 3)

There is no shared interest for proposals which do not fit to the scope of the call or with a final score (given during the EvC meeting) lower than 3 for Novelty of the research and for Impact. These pre-proposals will not be ranked, and will not be considered for invitation to Step 2.

The final score will be achieved by aggregating the scores given to the criteria “Novelty of the research” and “Impact” (equal weight for the two criteria). The overall score will be transformed into a score out of 10. The aggregation of this information is made using a file prepared by the Call Secretariat before the meeting.

Please note that:

- Some proposals (e.g. not fitting the scope of the call or highly and/or poorly scored with a consensus of scores) may not be discussed during the EvC meeting if all EvC members so decide.
- In case of a very large number of proposals to evaluate, in case of a remote EvC meeting, or in case the CSC do decides due to other reasons, scientific EvC members and policy/management EvC members may meet separately. In that case, the scientific and policy/management EvC members

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will first meet separately to convene the score they want to give to each proposal for their respective criteria. They will then meet in plenary to decide on one final score to be given to each proposal, without having the possibility to change the scores given in sub-panel.

The EvC ranks the pre-proposals based on their scores and assigns them to one of the following three categories:

- “A” very favourable for invitation to Step 2;
- “B” could be invited to Step 2;
- “C” not favourable for invitation to Step 2.

As needed, and if deemed relevant, the EvC can differentiate proposals within group B (i.e. define sub-groups within one group).

Decision on the pre-proposals invited to Step 2

The CSC will decide on the projects to be invited to submit full proposals, based on these categories established by the EvC.

The applicants of the selected pre-proposals will be invited to submit full proposals by the Call Secretariat.

B. EVALUATION OF FULL PROPOSALS (STEP 2):

The evaluation procedure of full proposals will take place as described below, once the full proposals have been submitted (see time schedule below).

1. Evaluation by external reviewers

Each proposal is reviewed by preferably:

- **2 external scientific reviewers; and**
- **1 external policy/management reviewer.**

As far as possible, scientific external reviewers should avoid assessing proposals involving participants from the country where they are based.

Eligible proposals are sent to:

- External reviewers with scientific expertise, who report on the set of criteria on excellence and quality/efficiency of the implementation; and
- External reviewers with policy/management expertise, who report on the set of criteria on impact;

Reviewers should be clear, but polite and tactful, and have to provide sufficient information to enable both the applicants and the members of the EvC to understand why particular scores have been assigned.

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Recommendations for the identification of external reviewers and assignment of proposals to external reviewers

- Reviewers are recommended by the Evaluation Committee. If necessary, the Call Secretariat identifies additional reviewers and mobilises the CSC to provide suggestions of external reviewers when there are missing reviews. As needed, the Call Secretariat may also ask the Biodiversa+ Advisory Board and Enlarged Stakeholder Board for additional suggestions.
- In the proposals, the participants are invited to give the names of external reviewers they do not want to be reviewed by and the names of external reviewers they consider most relevant to review their proposal: if needed, the Call Secretariat might assign them after checking for potential conflicts of interest (in case of conflict, the concerned name will be neglected).
- As far as possible, and if relevant, external reviewers should review two proposals or more.
- In case the number of external reviewers for a proposal is reached, the Call Secretariat will reallocate the remaining suggestion(s) of reviewers to other proposal(s), where relevant.
- The external reviews should be provided to the EvC two weeks before the evaluation meeting, if possible.
- The rules for conflicts of interest should be followed and reviewers from the same country as the teams carrying out the proposal should be avoided, as far as possible.

NB: external reviewers must remain anonymous, even after the end of the evaluation process.

2. Assessment by the Evaluation Committee based on external reviews

Allocation of full proposals to EvC members

The Call Secretariat allocates the proposals to the EvC members with their help. Each proposal is assigned to:

- **2 scientific EvC members** (one acting as rapporteur, and one as reader);
- **2 policy/management EvC members** (one acting as rapporteur, and one as reader).

Evaluation of full proposals and final EvC meeting

- Scientific EvC members assess the following criteria: excellence (threshold: 3.5) and quality/efficiency of the implementation (threshold: 3);
- Policy/management EvC members assess the following criterion: impact (threshold: 3);

In their evaluation, EvC members have to moderate the score and assessments received by the external reviewers.

Final EvC meeting

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During the final evaluation meeting, scientific EvC members have to decide (i) whether the proposals fit to the scope of the call and (ii) on the scores given to the proposals for the criteria ‘excellence’ and ‘quality/efficiency of the implementation’, while policy/management EvC members have to decide on the scores given to the proposals for the criterion ‘impact’.

Proposals that are not fitting the scope of the call won’t be ranked nor considered for funding. Besides, there is no shared interest for proposals with a final score lower than 3.5 for excellence and lower than 3 for quality and efficiency of the implementation and lower than 3 for impact. These proposals will not be ranked, and will not be considered for funding.

Please note that some proposals (e.g. not fitting the scope of the call or highly and/or poorly scored with a consensus of scores) may not be discussed during the EvC meeting if all EvC members so decide.

The EvC then has to compose the final ranked list of proposals recommended for funding. This will be achieved by aggregating the scores given to the three criteria taking into account their respective weights; i.e:

- 7 for excellence;
- 3 for implementation, and
- 6 for impact.

The overall score will be transformed into a score out of 15. The aggregation of this information is made using a file prepared by the Call Secretariat before the meeting.

Example: If a proposal receives a score of 4 for excellence, 4 for quality and efficiency of the implementation and 5 for impact, the aggregation of the scores taking into account their respective weight will give a score of 70. This score will be transformed into a score out of 15 points, i.e. 13.

The EvC ranks as many projects as possible. However, around the threshold, the EvC can consider that proposals with a same final score that it considers of equal quality should be equally ranked.

3. Next Steps, after the final Evaluation Committee meeting

Shortly after the Evaluation Committee meetings, the CSC meets to decide on the projects recommended for funding to the respective Funding Organisations’ decision boards, and selection must be made strictly following the final ranking list established by the EvC. The CSC has the intention to fund as many of the highest ranked proposals as possible within the possibilities of Funding Organisations’ budgets.

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YOUR ROLE AS AN EVC MEMBER:

- Check and declare your potential conflicts of interest.

AT STEP 1

- Read pre-proposals and provide a written assessment of the pre-proposals assigned to you using the relevant criteria before the evaluation meeting.
NB: your pre-assessment has to be entered in the Electronic Proposal Submission System (EPSS) before the EvC meeting (see part II).
Deadline to submit your pre-assessments on the EPSS is fixed to one to two week(s) before the EvC meeting, as far as possible.
- Present the pre-proposals and the evaluation made of the pre-proposals to the EvC during the evaluation meeting (rapporteur first, and then reader).
- Agree with the Co-chairs and all EvC members on a generic feedback to be sent to all applicants invited to Step 2 (if deemed relevant).

AT STEP 2

- Suggest external reviewers for the proposals assigned to you (see recommendations above).
 - Read full proposals
 - You are asked to first read the proposals “blind”, with no other input than your own expertise and experience and form your own first idea of the proposals. You can enter in the EPSS your own evaluation (optional)
 - After having performed your own evaluation, you are asked to synthesise and discuss the scores given by the external reviewers. This should be reflected in your pre-assessment of the full proposal to be entered into the EPSS before the final EvC meeting.
- NB: your pre-assessment has to be entered in the Electronic Proposal Submission System (EPSS) before the EvC meeting (see part II).**
- Deadline to submit your pre-assessments on the EPSS is fixed to one to two week(s) before the EvC meeting, as far as possible.**
- Present the proposals and synthesise the evaluation made of the proposals to the EvC during the final evaluation meeting (rapporteur first, and then reader).

ROLE OF RAPPORTEUR ONLY (both scientific and policy/management):

- AT STEP 1: provide a written explanation of the evaluation made of the pre-proposals ranked in the group B “Could be invited to Step 2” and C “Not favourable for invitation to Step 2”. Please note that you’ll have to focus on the criteria you had to evaluate (i.e. fit to the scope of the call and novelty of the research for scientific rapporteurs and impact for policy/management rapporteurs). The feedbacks will only be sent to applicants not submitting a proposal at Step 2. This will be done

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after the deadline for submitting full proposals. No score nor rank will be communicated to the applicants.

- AT STEP 2: Provide a written explanation on the final evaluation made of the full proposal to be sent to applicants and to the CSC. Please note that you'll have to focus on the criteria you had to evaluate (i.e. Excellence and quality/efficiency of the implementation for scientific rapporteurs and impact for policy/management rapporteurs).

Please note that the feedback has to be validated by the Co-chairs both at Steps 1 and 2, and will be checked for the sake of consistency by the Biodiversa+ Secretariat and Coordinator.

The validation of feedbacks for projects recommended for funding will be prioritised as some Funding Organisations need them to start their funding decision process.

Specific recommendation for the feedback to be sent to applicants and CSC:

It is vital to ensure that the comments match the final scores. The strengths and weaknesses of the proposals should be clearly identified, especially for projects that have some good parts and some weaknesses that mean they do not get funded or just miss out on funding.

Feedback should be clear, polite and constructive (i.e. it should help applicants to improve future applications).

Note that no score nor rank will be communicated at any time to the applicants.

NB: Please note that for the proposals regarded “fundable”, the EvC is invited to give advice on whether the proposed budget is appropriate and realistic for the proposal as written including balance across the Partners in relation to contribution to the project and is cost-effective, thus representing good value for money requested. However, the EvC should keep in mind that costs vary greatly according to the countries, and that large differences in budgets requested by different teams do not necessarily mean an incoherent budget. Funding Organisations will take into account, as far as possible, the recommendation of the EvC concerning budget, but has no obligation to follow their recommendations.

GENERAL RECOMMENDATIONS & INFORMATION

- **Letters of support are NOT requested** (except for self-financed Partners who have to provide a letter of commitment) and should not be considered in the evaluation process.
- **Applicants should not include links or hyperlinks** in the project description of their pre- and full proposals unless specifically asked in the application form (i.e., organisation or research webpage). You should only evaluate the proposals based on the information contained in the pre-proposals.
- **Conflict of interest:** please note that during the EvC meetings, you'll have to leave the meeting room during discussion of the proposals where you have a conflict of interest.
- In the document 6 “Assessment criteria” of the Call documents and the annex on “Review Forms”, you'll be provided with information on the assessment criteria you should take into account. Please

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make sure **to stick to the criteria / sub-criteria you have to evaluate and do not take other considerations into account in your evaluation.**

- Please note that for some criteria, you’ll have to give an overall score for the criterion as well as sub-scores to sub-criteria. Please note that **your overall score should be consistent with the sub-scores given to sub-criteria.**

C. SUMMARY OF THE TIME SCHEDULE:

10 September 2024	Launch of the call and Announcement of opportunity published
24 September 2024	General Webinar to promote the Call
8 November 2024	Deadline for submitting pre-proposals
December 2024	Eligibility Check <ul style="list-style-type: none"> - The proposals are checked by the Call Secretariat and each Funding Organisation according to their eligibility criteria
November 2024 – January 2025	EvC members: <ul style="list-style-type: none"> - Read and assess the pre-proposals into the EPSS <ul style="list-style-type: none"> ➤ Deadline to enter pre-assessment: one to two week(s) prior to the EvC meeting
Late January – Early February 2025	First Evaluation Committee meeting Objectives: evaluate the pre-proposals and decide on the scores and ranked list of pre-proposals recommended for the 2 nd Step
11 April 2025	Deadline for submitting full proposals
April – June 2025	External reviewers: <ul style="list-style-type: none"> - The proposals are sent to the external reviewers - The external reviewers enter their evaluation on the EPSS <ul style="list-style-type: none"> ➤ Indicative deadline for external reviewer to enter their evaluation on the EPSS: Mid-Late May
	EvC members: <ul style="list-style-type: none"> - Read the proposals “blind”, with no other input than your own expertise and experience and form your own first idea of the proposals. You can enter your own evaluation into the EPSS - Then, synthesise and discuss the scores given by the external reviewers in the pre-assessment entered into the EPSS. <ul style="list-style-type: none"> ➤ Indicative deadline to enter pre-assessment: one to two week(s) prior to the final EvC meeting
Late-June – early-July 2025	Final Evaluation Committee meeting Objectives: to decide on the final scores and final ranked list of proposals.
September 2025	CSC meeting to decide on the list of proposals to be recommended for funding (selection made strictly following the final ranking list established by the EvC)

II. USE OF THE ELECTRONIC PROPOSAL SUBMISSION SYSTEM (EPSS)

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NB: For technical help, please contact the helpdesk

A. Short definition of the EPSS

The Electronic proposal submission system (EPSS) is an online platform where:

- The applicants submit their proposals;
- The members of the EvC suggests names of external reviewers for proposals allocated to them;
- The members of the EvC and the external reviewers access to the proposals they have to review and enter their evaluation.
- The members of the EvC enter the final feedbacks to be sent to applicants.

B. Relevant information available on the EPSS

- The list of the pre- and full proposals you have to evaluate;
- The information related to the pre- and full proposals you have to evaluate (title, abstract, Partners, budget, etc. but also the .pdf containing the pre- and full proposal and the CVs of the principal investigators and work package leaders in the proposal).
- The evaluation made of pre- and full proposals (available to all a few days before the EvC meetings, except if you have a conflict of interest) and the external reviews submitted.

C. Use of the EPSS:

You will have to implement the following actions on the EPSS:

- **Declare online that you do not have any conflict of interest** for the proposals you have to evaluate and that you agree with the Code of conduct for conflict of interest, confidentiality and non-disclosure.
- **Suggest external reviewers** for the proposals allocated to you
- **Enter your evaluation** of the pre- and full proposals you are responsible for and the final feedbacks to be sent to applicants (for proposals for which you are rapporteur only).

D. Access to the other reviews:

- a. You can **access the external reviews before submitting your review**, so that you can synthesise the evaluations made by the external reviewers (for Step 2).
- b. **After submitting your review**, you will also have **access to the review submitted by the other rapporteur/reader (in Step 1 and Step 2)**. Please read it before the final evaluation meeting to ease the discussion. You will also have access to all the other proposals and submitted reviews (except for proposals where you declared a conflict of interest) a few days before the evaluation committee meeting.

ANNEX 1: List of abbreviations

- **CSC:** Call Steering Committee

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- **EPSS:** Electronic Proposal Submission System
- **EvC:** Evaluation Committee

ANNEX 2: Useful documents

Code of conduct: see Document 7 of the Call documents

After accepting to act as member of the EvC, you will be required to sign Conflict of interest, confidentiality and non-disclosure declaration

You'll find in this document a summary of potential conflicts of interest and other circumstances that may raise questions about the impartiality of your expert evaluation. Before submitting any written reviews or before participating in any meeting in which proposals are discussed, please inform the Call Secretariat whether circumstances exist that could be interpreted as a conflict of interest.

NB: You cannot be a member of the EvC if you are involved in a proposal submitted to the call.

Assessment criteria: see Document 6 of the Call documents & the annex of the review forms

Please note that:

- **You are invited to use the full range of scoring available to you.** Please note that you are allowed to use half scores;
- Any project that does not fit within the scope of the call described will not be recommended for funding, regardless of its scientific quality;
- For each criterion: proposals which do not meet the threshold for one criterion won't be ranked nor recommended for funding.

Guidelines on how to write feedbacks to applicants:

Please note that these guidelines will include example of feedbacks sent to applicants.

Other resources:

For policy/management EvC members, the following documents on stakeholder engagement and policy relevance in proposals might be useful to help you in the evaluation process. These documents and links were also given to the applicants

- Biodiversa Policy guide: <https://www.biodiversa.org/1563/download>
- Biodiversa Stakeholder engagement handbook: <https://www.biodiversa.eu/wp-content/uploads/2022/12/stakeholder-engagement-handbook.pdf>

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Annex 5a: Review forms for pre-proposals

The format of the review forms will be modified to fit the electronic proposal submission system (EPSS) of the call.

Review forms are confidential and should not be disclosed.

1. Fit to the scope of the call (assessed by scientific EvC members)

Please fill in the form below by answering “Yes” or “No” and by providing written comments

<p>Criteria: Do you think this proposal fits to the scope of the call?</p> <p>You should assess the relevance of the proposed research against the scope and objectives set forth in the text of the call; any project that does not fit this will not be recommended for funding, regardless of its scientific quality.</p> <p>Please note that for this criterion, proposals should be evaluated according to the adequacy of their objectives and research questions with the scope of the present call. The quality of the methods however should not be evaluated as part of this criterion.</p>	<p>Yes/No</p>
<p>Comments / explanations:</p> <p><i>Please substantiate how you value the proposal regarding the above-mentioned criterion</i></p> <p><i>(Min. 1,000 and max. 2,000 characters, incl. spaces for the two below sections (strengths & weaknesses))</i></p> <p><i>Strengths:</i></p> <p><i>Weaknesses:</i></p>	

2. Novelty of the research (1-5; threshold: 3) (assessed by scientific EvC members)

Please fill in the form below by using a score between 1 to 5 for each criterion and by providing written comments

<p>Score</p>	<p>Novelty of the research</p>
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1- Very poor	The criterion is addressed in an inadequate manner or there are serious inherent weaknesses
2- Poor	Strong or very significant weaknesses
3- Good	The proposal addresses the criterion well, but some improvements would be necessary
4- Excellent	The proposal addresses the criterion very well, although there are some minor shortcomings
5- Outstanding	The proposal addresses the criterion in an outstanding manner and shortcomings if any are minor.

<p>Criteria: How do you value this proposal regarding the <u>novelty / originality of the research goals and objectives?</u></p> <p>You should assess the novelty of the proposed research following the sub-criteria below (but note that only one overall score should be communicated here):</p> <p>a) <u>The novelty and originality of the research objectives:</u> Explanation of the novelty of the research planned; e.g. how does the activity go beyond the state-of-the-art and advances knowledge; to what extent the proposed work explores novel concepts and the advancement of with respect to the scope and objectives of the call? to what extent does the proposed activity suggest and explore creative, original concepts?</p> <p>b) <u>Relevance of the proposed work and clarity of the theoretical framework, research questions, and hypothesis to be tested:</u> To what extent the proposed work can lead to the purpose of the call? To what extent the proposed theoretical framework, research questions and hypothesis to be tested are clear?</p> <p>NB1: When reading the Call Text, please keep in mind that both research projects generating knowledge from the production of new primary data and research projects conducting research by making use of available data are equally welcome in this call and should thus be equally evaluated.</p> <p>NB2: The quality of the project implementation and structure (including complementarity of the consortium in terms of expertise or disciplines, and thus interdisciplinarity) should not be assessed at Step 1. This aspect will be assessed for full proposals only (Step 2) by scientific EvC members.</p>	<p>Overall score (1-5, threshold 3.0)</p>
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<p>NB3: the methodological feasibility and risk management of a project should not be evaluated at Step 1 as applicants may not have enough room to sufficiently detail the underlying methods of their project.</p> <p>NB4: Transdisciplinarity (see Box 3 “What is meant by Transdisciplinarity?” in Call Document 6 “Assessment Criteria”) will be assessed by policy-management EvC members.</p>	
<p>Comments / explanations:</p> <p><i>Please substantiate how you value the proposal regarding the above-mentioned criterion</i></p> <p><i>(Min. 250 and max. 2,000 characters, incl. spaces for the two below sections (strengths & weaknesses))</i></p> <p><i>Strengths:</i></p> <p><i>Weaknesses:</i></p>	

3. Impact (1-5; threshold: 3) (assessed by policy/management EvC members)

Please fill in the form below by using a score between 1 to 5 and by providing written comments

Score	impact
1- Very poor	The criterion is addressed in an inadequate manner or there are serious inherent weaknesses
2- Poor	Strong or very significant weaknesses
3- Good	The proposal addresses the criterion well, although some improvements would be necessary
4- Excellent	The proposal addresses the criterion very well, although there are some minor shortcomings
5- Outstanding	The proposal addresses the criterion in an outstanding manner and shortcomings if any are minor.

<p>Criteria: How do you value impact of this proposed projects?</p> <p>You should assess the expected impact of a proposed project based on the following sub-criteria.</p> <p>Please note that your overall score should only reflect how you consider these two sub-criteria and should not take into consideration any other criterion.</p> <p>Your overall score should thus be consistent with the two sub-scores given below. In case of a major inconsistency, an error message will appear in the EPSS.</p>	<p>Overall score (1-5, threshold 3.0)</p>
<p>a) <u>Potential contribution of the proposed research to society, including policy:</u> to what extent could the proposed work lead to novel / original contribution</p>	<p>Sub-score</p>

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<p>for tackling societal challenges, including policy challenges? <u>To what extent does the project appear to have a credible approach/ambition towards stakeholder and/or end-user engagement to achieve the expected societal impact, including policy impact?</u></p> <p>NB: the level of stakeholder engagement <i>per se</i> should not be evaluated at Step 1 as applicants may not have enough room to sufficiently detail this aspect in the pre-proposal application form.</p>	(1-5)
<p>b) <u>Transnational added value:</u> what is the transnational added value to be expected from the collaboration from the perspective of society, including policy (see Box 1 – what is meant by transnational added value?).</p>	Sub-score (1-5)
<p>Comments / explanations:</p> <p><i>Please substantiate how you value the proposal regarding the above-mentioned criteria</i></p> <p><i>(Min. 1,000 and max. 2,000 characters, incl. spaces for the two below sections (strengths & weaknesses))</i></p> <p><i>Strengths:</i></p> <p><i>Weaknesses:</i></p>	

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Annex 5b: Review forms for full proposals

The format of the review form will be modified to fit the electronic proposal submission system (EPSS) of the call.

Review forms are **confidential** and should not be disclosed.

SCIENTIFIC EVALUATION FORM
EXCELLENCE & QUALITY/EFFICIENCY OF THE IMPLEMENTATION
(for both scientific EvC members and scientific external reviewers)

1. Evaluation form for Excellence

Please fill in the form below by answering yes or no to the question “A- Fit to the scope and objectives of the call”, by scoring the criterion “B- Scientific excellence” on a scale from 1 to 5 (giving half scores is allowed), and by providing written comments.

Score	Excellence
1- Very poor	The criterion is addressed in an inadequate manner or there are serious inherent weaknesses
2- Poor	Quality science, but not leading edge
3- Good	Generally competitive science
4- Excellent	At the forefront of the field, will significantly advance understanding
5- Outstanding	Exceptional merit and originality; major scientific impact expected

A- Fit to the scope and objectives of the call You should assess the relevance of the proposed research against the scope and objectives set forth in the scientific text of the call; any project that does not fit this will not be recommended for funding, regardless of its scientific quality. Please note that for this criterion, proposals should be evaluated according to the adequacy of their objectives and research questions with the scope of the present call. The quality of the scientific methods however should not be evaluated part of this criterion but part of the sub-criterion “scientific excellence” (see criteria 1.B); and the quality of, e.g. stakeholder engagement, will be evaluated part of the “impact” criteria (see criteria 3) by policy/management EvC members.	Yes / No
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B- Scientific Excellence	Overall score (1-5, threshold)
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<p>You should assess the scientific excellence of the proposal (including its transnational added value) considering the following sub-criteria. Please note that your overall score should only reflect how you consider these different sub-criteria and should not take into consideration any other criteria.</p> <p>a) Scientific quality of the proposed research goals and objectives: how well does the activity advance knowledge and understanding within its own field and across different fields? Does the proposal contribute to scientific excellence and significant progress toward the state of the art?</p> <p>b) Novelty/originality and innovation of the research goals and objectives: to what extent does the proposed activity suggest and explore creative, original concepts? Clarity of the hypothesis/ theories/ or research questions should be considered.</p> <p>c) Transnational added value to be expected from the collaboration from a scientific perspective (see Box 1 “what is meant by transnational added value?” in Call Document 6 “Assessment Criteria”).</p> <p>d) Level of mobilisation and integration of different scientific disciplines and competencies in the proposed research (level of interdisciplinarity; see Box 2 “What is meant by interdisciplinarity?” in Call Document 6 “Assessment Criteria”). This should be evaluated in terms of relevance regarding the topics and research questions addressed (i.e. to what extent the right disciplines and skills have been mobilised to tackle these topics and research questions)</p> <p>e) Relation to other relevant programmes (does the project plan to link-up with other relevant existing programmes and initiatives with a similar focus than the topic of the call?)</p> <p>Considering that a given project fits within the scope and objectives of the call, its scientific quality is considered before all other criteria and is a prerequisite for funding (as reflected by the threshold value and weighting system of the scores).</p> <p>NB1: When reading the Call Text, please keep in mind that both research projects generating knowledge from the production of new primary data and research projects conducting research by making use of available data are equally welcome in this call and should thus be equally evaluated.</p> <p>NB2: Transdisciplinarity (see Box 3 “What is meant by Transdisciplinarity?” in Call Document 6 “Assessment Criteria”) will be assessed by policy-management EvC members.</p>	<p>3.5; giving half scores is allowed)</p>
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Comments:

Please substantiate how you value the proposal regarding the above-mentioned criteria (fit to the scope and objectives of the call, and scientific excellence)

(Min. 1,000 and max. 4,000 characters, incl. spaces for the two below sections (strengths & weaknesses)

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Strengths:

Weaknesses:

2. Evaluation form for quality and efficiency of the implementation

Please fill in the form below by scoring each criterion on a scale from 1 to 5 and by providing written comments

Score	Quality/efficiency of the implementation
1- Very poor	Major or very significant weaknesses that might impact the success of the proposal
2- Poor	Strong or very significant weaknesses
3- Good	The proposal addresses the criterion well, although some improvements would be necessary
4- Excellent	The proposal addresses the criterion very well, although there are some minor shortcomings
5- Outstanding	The proposal addresses the criterion in an outstanding manner and shortcomings if any are minor.

<p>Criteria for the overall quality and efficiency of the implementation</p> <p>You should assess the quality and efficiency of the implementation of the proposal considering the following sub-criteria. Please note that your overall score should only reflect how you consider these different sub-criteria and should not take into consideration any other criterion.</p> <p>a) Quality and efficiency of the management structure and procedures, its organisation and coordination: how well conceived and organised is the proposed activity? Is there an operational plan with well-defined milestones in place?</p> <p>b) Composition, complementarity, competence and expertise of the consortium (including knowledge and skills complementarity, and balance in terms of gender and career stage): how well qualified are the applicants in terms of science knowledge, expertise and experience to conduct the project? What is the quality of previous work in terms of past or potential contributions to, and impact on the proposed and other areas of research? Is the Leading Principal Investigator team (including any identified Co-Principal Investigators) able to lead the project, e.g. having strong management and leadership skills, or having complementarity of expertise and synergy of the members of the team? Is the team composition</p>	<p>Overall score (1-5, threshold 3.0; giving half scores is allowed)</p>
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adequate and did the consortium consider gender balance and career stage balance in its composition?	
c) Level of integration and collaboration between Partners involved in the proposal.	
d) Appropriateness of resources and funding requested, with justification (budget, staff, equipment): are the requested investments well justified and relevant?	
e) Project feasibility and risk management, including demonstration of data availability/access where relevant.	
f) Data management planned overview and data sharing.	

Comments:

Please substantiate how you value the proposal regarding the above-mentioned criterion (quality / efficiency of the implementation)

(Min. 1,000 and max. 4,000 characters, incl. spaces for the two below sections (strengths & weaknesses)

Strengths:

Weaknesses:

FORM FOR EVALUATION OF IMPACT
(for both policy/management EvC members and external reviewers)

Review forms are confidential and should not be disclosed.

Please fill in the form below by scoring each criterion on a scale from 1 to 5 (giving half score is allowed) and by providing written comments.

Score	Societal impact, including policy impact
1 – Very poor	No discernible link of scientific advances to application in practice and/or policy
2 - Poor	Moderate link of scientific advances to application in practice and/or policy
3 - Good	Generally competitive in linking scientific advances to application in practice and/or policy
4 - Excellent	At the forefront of the field, great potential to significantly advance application in practice and/or policy
5 - Outstanding	Exceptional merit; major societal impact, including policy impact expected

Impact (1-5; threshold: 3)



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The expected Impact of the proposed research for society, including policy, and the quality and efficiency of plans for stakeholder engagement (see Box 2 “What is meant by Transdisciplinarity?” in Call Document 6 “Assessment Criteria”) will be assessed by means of the two following criteria. It should be noted that proposals may choose and argue, as appropriate and in relation to the proposed research, to focus on achieving impacts for society or policy exclusively, or for both. Such a choice should however be explicit and substantiated according to the issues tackled.

Criteria A relates to the expected societal impact, including policy impact the proposed work seeks to achieve, and its transnational added value from the impact perspective, while criteria B relates to the approach to stakeholder engagement and precise engagement activities planned in the project.

<p>A. Societal relevance, including policy relevance and importance of the research for solving pressing issues</p> <p>This sub-criterion should be assessed considering the 3 following elements. Please note that your score should only reflect how you consider these different elements and should not take into consideration any other elements.</p> <ul style="list-style-type: none"> a) <u>Clear statement of the application for society and policy.</u> Any proposal must highlight the importance of the proposed work for solving wider pressing societal issues, including policy issues, related to the scope and objectives of the call, and contain details on the relevance of the proposed research to, e.g., specific management plans and processes, policy instruments or current legislation. b) <u>Clearly identified end users</u> of the research results and ways to engage them. End-users may be different (e.g. wider group) than stakeholders directly mobilised in the project (criteria B), while stakeholders may often also be end users of project outcomes. The proposal will be expected to identify clearly end-users of the project outcomes, highlight potential arrangements for their wider uptake of knowledge and results and, as far as possible, to name organisations and individuals with whom the project plans to work on towards the wider uptake of its results. c) <u>Transnational added value</u> to be expected from the collaboration from the perspective of society, including policy (see Box 1 “what is meant by transnational added value?” in Call Document 6 “Assessment Criteria”). 	<p>Sub-score</p> <p>(1-5; giving half score is allowed)</p>
<p>B. Approach to stakeholder engagement:</p> <p>This sub-criterion includes the level of transdisciplinarity, as defined in Box 2 (“What is meant by Transdisciplinarity” in Call Document 6 “Assessment Criteria”) and stakeholder engagement planned at the different stages of the projects. It should be assessed considering the 6 following elements. Please note that your score should only reflect how you consider these different elements and should not take into consideration any other elements.</p> <ul style="list-style-type: none"> a) Rationale for the stakeholder engagement planned in the project. b) Identification of appropriate stakeholders to be engaged in the project, i.e. precise organisations and as far as possible, individual representatives of these organisations, what role they would have, and the desired outcomes of their engagement. 	<p>Sub-score (1-5; giving half score is allowed)</p>

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<p>c) Description of precise interests and support/investment from identified stakeholders on the specific aims of the project, including of their involvement at the proposal development stage (e.g. relating precise project objectives to specific stakeholders’ ongoing and/or future activities).</p> <p>d) Methods/activities proposed for engagement of relevant stakeholders, planning of the engagement and allocation of sufficient resources to its implementation.</p> <p>e) Evidence that the necessary skills to engage stakeholders are available in the project team or will be obtained (e.g. through relevant training, or the use of external sources).</p> <p>f) Methods and plans for knowledge and/or technology transfer.</p> <p>NB: Interdisciplinarity (see Box 2 “What is meant by interdisciplinarity?” in Call Document 6 “Assessment Criteria”) will be assessed by scientific EvC members.</p>	
<p>You should assess impact of the proposal considering the two sub-criteria above. Please note that your overall score should only reflect how you consider these two sub-criteria and should not take into consideration any other criteria.</p> <p>Your overall score should thus be consistent with the two sub-scores given. In case of a major inconsistency, an error message will appear in the EPSS.</p>	<p>Overall score (1-5, threshold 3.0; giving half score is allowed)</p>

Comments:

Please substantiate how you value the proposal regarding the above-mentioned criterion (Impact)

(Min. 1,000 and max. 4,000 characters, incl. spaces for the two below sections (strengths & weaknesses))

Strengths:

Weaknesses:

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Annex 6: Information and Guidelines for the co-chairs of the Evaluation Committee

NOTE: *This document should be read in conjunction with the Guidelines for the Evaluation Committee*

You were nominated to act as scientific Chair or policy/management co-chair of the Evaluation Committee (EvC) of the Biodiversa+ joint call for proposals.

The Biodiversa+ network thank you very much for your willingness to act as Co-chairs of the EvC.

The Co-chairs of the EvC, given the amount of work they have to undertake, will receive a fee of 2,000€.

These rates are net of any taxes (however, social charges apply). The fee will be paid by the French Foundation for Research on Biodiversity (FRB), as the entity hosting the Biodiversa+ core secretariat.

Besides, your travel, meal and accommodation expenses to attend EvC meeting(s) will be covered.

Particular role of the Co-chairs

- Contribute to the composition of the EvC;
- Support the Call Secretariat in the assignment of pre-proposal and full proposals to EvC members;
- Support the Call Secretariat in the identification of external reviewers and assignment of proposals to external reviewers;
- Chair the EvC meetings;
- Carefully read the feedbacks written by the rapporteurs which will be sent to the applicants

1. COMPOSITION OF THE EvC

The EvC members are selected upon a first suggested list of experts provided by each member of the Call Steering Committee (CSC).

The Co-chairs of the EvC will select a limited number of experts (depending on the number of submitted proposals) from this list, with attention to the relevance of their expertise for this particular call and balance in the field of expertise according to the research questions addressed by the submitted proposals.

A particular effort in setting up the EvC will be done to ensure a good geographical balance and gender balance among its members (target: at least 40% of one gender).

The final composition of the EvC will be agreed on and approved by the CSC.

2. ASSIGNMENT OF PROPOSALS TO EvC MEMBERS

The Call Secretariat will organise a meeting with the Co-chairs or consult them by email to assign pre-proposals and full proposals to members of EvC. The allocation assignment will take into account the

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specific expertise of the EvC members and ensure, as far as possible, that EvC members evaluate approximately the same number of pre-proposals and full proposals.

3. IDENTIFICATION OF EXTERNAL REVIEWERS AND ASSIGNMENT OF PROPOSALS TO EXTERNAL REVIEWERS

The Experts fulfilling the role of scientific and policy/management external reviewers are suggested primarily by the EvC members for the proposals assigned to them.

In case reviews are missing, the Co-chairs will particularly support the Call Secretariat for the identification of additional relevant external reviewers.

4. CHAIRING OF THE EVC MEETINGS

EvC Meetings – Aims

- To ensure open, democratic discussion of proposals where everyone is heard and which are based on the specified assessment criteria (see call documents).
- To arrive at a recommendation of which proposals fully reflect the ambitions of the Biodiversa+ call.
- To provide a final overall score for each pre-proposal based on the review criteria and provide a final ranking of pre-proposals based on this overall score, to indicate to the CSC the pre-proposals that should be invited to submit a full proposal.
- To provide a final overall score for each full proposal based on the review criteria and provide a final ranking of full proposals based on this overall score, giving particular attention to those in the threshold region that may or may not get funded depending on available resources.

To note: in addition to the Co-chairs, EvC members and Call Secretariat, members of the Call Steering Committee (CSC), who represent each of the Funding Organisations involved in the call, and an independent observer to report to the European Commission may also be present at the EvC Meetings as observers.

EvC Meeting – Role of Call Secretariat:

The Call Secretariat for the call is provided by ANR and NCN.

The Call Secretariat will provide support for the whole organisation of the evaluation process and during the Evaluation Committee meetings. They will organise Board meetings with the Co-chairs when necessary (and at least one prior to each EvC meeting) and provide all the necessary information (including all call documents and guidelines).

EvC Meeting - recommendation for chairing

During the meeting, the roles of the Co-chairs are to:

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- For each proposal: invite the rapporteurs and readers to comment on their evaluation of pre- and full proposals, focusing on the rationales behind their evaluation (and not commenting on the general content of the proposals);
- Ensure that sufficient time is allowed to discuss each proposal, but also that discussions on specific proposals don't over-run to the detriment of others. In particular, the Co-chairs should make sure that the EvC does not spend too much time discussing poorly scored proposals.
- Please note that some proposals (e.g. not fitting the scope of the call or highly and/or poorly scored with a consensus of scores) may not be discussed during the EvC meetings if all EvC members accept with the list suggested by the Co-chairs.

In addition, the Co-chairs may need to:

- Remind EvC Members of the ambition and aims of the call if the meeting is going off-track;
- Help EvC Members come to a consensus over the ranking of the pre-proposals and full proposals (Note: The EvC is comprised of different countries with differing cultures and potentially different EvC procedures – some care may be needed to ensure that all panellists are involved in the appropriate discussions);
- Ensure that both scientific and policy/management EvC members assess pre-proposals and full proposals strictly according to the particular set of criteria they have to evaluate; and that they do not interfere with the assessment of criteria they are not supposed to evaluate;
- For proposals where major differences of opinion exist between rapporteur/reader and/or external reviewers, the EvC may be split into groups in order to first reach a consensus among the groups before coming back together and discuss the proposals among the whole EvC;
- If no consensus on a proposal can be reached within the EvC, the Co-chairs can decide to nominate an extra reader.

At the start of each day, the Co-chairs are invited to:

- Welcome EvC Members to the meeting and set expectations in terms of the aims and ambitions of the call and the EvC process;
- Ensure that EvC Members understand that they are present at the meeting for their expertise and not to represent their host countries or organisations;
- Ensure that EvC Members understand, that at the end of the process, they will be providing a recommendation to the Funding Organisations, not a decision;
- Remind EvC Members of the need to disclose any vested interests and of the Confidentiality and Non-Disclosure declarations that they have signed.

At the close of the Day 1 (and 2 in case of 3-days meeting), the Co-chairs may wish to:

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- Give a brief summary of the progress made during the day;
- Remind EvC Members of the timetable for the next day and of the need for confidentiality;
- Remind the EvC of any further issues arising from the day’s discussion which have the potential to be relevant to the rest of proceedings (in consultation with the Call Secretariat).

At the end of last day, the Co-chairs need to:

- Ensure that a consensus is reached on the ranked list of pre-proposals (if applicable) and projects recommended for funding (Step 2);
- Make sure that the ranking is based only on the evaluation of the accepted criteria;
- At the first EvC meeting, decide with all EvC members on a generic feedback to be sent to all applicants invited to Step 2 (if deemed relevant).
- Remind EvC Members of the confidential nature of the meeting and of the Confidentiality and Non-Disclosure declarations that they have signed;
- Thank EvC Members for their contribution to the meeting;
- Carefully read the feedbacks written by the rapporteurs which will be sent to the applicants.

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Annex 7a: Information and Guidelines for the scientific external reviewers

You were invited to act as scientific external reviewer for the Biodiversa+ call for proposals. Your role will be as a scientific external reviewer in your field of experience rather than as a representative of any organisation or nation. Your review cannot be done by any replacement.

The Biodiversa+ network thanks you very much for your willingness to participate in the evaluation procedure.

NB: Please note that you cannot act as external reviewer if you are involved in a proposal submitted to the call. In case you were invited while you are involved in a proposal within the present call, please let the Call Secretariat know as soon as possible.

I. GENERAL EVALUATION PROCEDURE OF THE CALL

The evaluation process for the full proposals submitted in the 2024-2025 Biodiversa+ call is based on:

1. An **Evaluation Committee (EvC)** composed of experts in the natural, technical, social sciences and humanities as well as policy/management experts.
The role of the EvC is to assess the submitted proposals, taking into account the reviews made by external reviewers, and to establish the final ranking of the submitted proposals.
2. **External reviewers** who assess the submitted proposals according to a set of pre-defined criteria (see section III below). Each proposal will be reviewed by preferably 2 scientific external reviewers and 1 policy/management external reviewer. As far as possible, external reviewers should avoid assessing proposals involving participants from their own country.

After the final EvC meeting, the Call Steering Committee – who represent each of the Funding Organisations involved in the call – will meet to decide on the projects to be funded, and selection must be made strictly following the final ranking list established by the EvC.

II. YOUR MANDATE

You were invited to act as scientific external reviewer and will have to evaluate online (through the [EPSS](#) – Electronic Proposal Submission System) one or several full proposals by virtue of your scientific background and/or knowledge of broader aspects relevant to the evaluation process.

As **scientific external reviewer**, you will have to score the proposal(s), comment on your evaluation and write some concluding sentences commenting on the overall scores according to two assessment criteria: the “**Excellence**” criterion and “**Quality/efficiency of the implementation**” criterion (see part III for the assessment criteria).

NB: Please keep in mind that letters of support are not requested (except for self-financed Partners who need to provide a letter of commitment) and should not be considered in the evaluation process.

NB: Please note that applicants should not include links or hyperlinks in the project description of their proposals unless specifically asked in the application form (i.e., organisation or research webpage). You should only evaluate the proposals based on the information contained in the proposal.

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 7a: Information and guidelines for the scientific external reviewers

NB: In case the description of a project exceeds the number of pages allowed, any additional pages are cut-out.

NB: please note that your identity as an external reviewer of this call will be kept confidential to applicants. You should not indicate to applicants of a proposal you are reviewing that you acted as reviewer of their proposal.

Recommendations for writing the comments / concluding sentences on your evaluation:

You should be clear, but polite and tactful, and provide sufficient information to enable the members of the EvC to understand why particular scores have been assigned.

Steps to follow to submit your review:

- 1) Before starting your evaluation, you should first agree to the Code of conduct for conflict of interest, confidentiality and non-disclosure.
 - ➔ **You will have to accept online on the EPSS the Code of conduct for conflict of interest, confidentiality and non-disclosure**
 - ➔ **For each proposal you have to evaluate, you will have to confirm online on the EPSS you do not have a conflict of interest.**
- 2) You will then be able to access the proposal(s) information (title, abstract, Partners, budget, the CVs of the principal investigators and work package leaders in the proposal etc.) and to download the .pdf containing the project description on the EPSS.
- 3) After having read the proposal, you will have to enter and submit your final evaluation(s) onto the EPSS.

Please note that on the EPSS you can save your review(s) several times but submit it/them only once.

III. ASSESSMENT CRITERIA

Refer to the **Call Document 6 ‘Assessment criteria’** of the [Call documents](#)

Please note that:

- Any project that does not fit within the scope of the call described will not be recommended for funding, regardless of its scientific quality;
- The external reviewers are invited to use the full range of scoring available to them.

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 7b: Information and guidelines for the policy/management external reviewers

Annex 7b: Information and guidelines for the policy/management external reviewers

You were invited to act as policy/management external reviewer for the Biodiversa+ call for proposals. Your role will be as a policy/management external reviewer in your field of expertise rather than as a representative of any organisation or nation. Your review cannot be done by any replacement.

The Biodiversa+ network thanks you very much for your willingness to participate in the evaluation procedure.

NB: Please note that you cannot act as external reviewer if you are involved in a proposal submitted to the call. In case you were invited while you are involved in a proposal within the present call, please let the Call Secretariat know as soon as possible.

I. GENERAL EVALUATION PROCEDURE OF THE CALL

The evaluation process for the full proposals submitted in the Biodiversa+ call is based on:

- 1) **An Evaluation Committee (EvC)** composed of experts in the natural, technical, social sciences and humanities as well as policy/management experts.
The role of the EvC is to assess the submitted proposals, taking into account the reviews made by external reviewers, and to establish the final ranking of the submitted proposals.
- 2) External reviewers who assess the submitted proposals according to a set of pre-defined criteria (see section III below). Each proposal will be reviewed by preferably 2 scientific external reviewers and 1 policy/management external reviewer. As far as possible, external reviewers should avoid assessing proposals involving participants from their own country.

After the final EvC meeting, the Call Steering Committee – including a representative from each of the Funding Organisations involved in the call – will meet to decide on the projects to be funded, and selection must be made strictly following the final ranking list established by the EvC.

II. YOUR MANDATE

You were invited to act as policy/management external reviewer and will have to evaluate online (through the [EPSS](#) – Electronic Proposal Submission System) one or several full proposals by virtue of your expertise and knowledge relevant to the evaluation process.

As **policy/management external reviewer**, you will have to score the proposals, to comment on your evaluation and write some concluding sentences commenting on the overall scores according to the **“Impact” criterion** (see part III for the assessment criteria).

NB: Please note that you are supposed to evaluate proposals only according to the “Impact” criterion. You should not comment on other criteria.

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 7b: Information and guidelines for the policy/management external reviewers

NB: Please keep in mind that letters of support are not requested (except for self-financed Partners who need to provide a letter of commitment) and should not be considered in the evaluation process.

NB: Please note that applicants should not include links or hyperlinks in the project description of their proposals unless specifically asked in the application form (i.e., organisation or research webpage) You should evaluate the proposals based on the information contained in the proposal.

NB: In case the description of a project exceeds the number of pages allowed, any additional pages are cut-out.

NB: please note that your identity as an external reviewer of this call will be kept confidential to applicants. You should not indicate to applicants of a proposal you are reviewing that you acted as reviewer of their proposal.

Recommendations for writing the comments / concluding sentences on your evaluation:

You should be clear, but polite and tactful, and provide sufficient information to enable the members of the EvC to understand why particular scores have been assigned.

Steps to follow to submit your review:

- 1) Before starting your evaluation, you should first **agree to the Code of conduct for conflict of interest, confidentiality and non-disclosure.**
 - ➔ You will have to accept online on the EPSS the Code of conduct for conflict of interest, confidentiality and non-disclosure
 - ➔ **For each proposal you have to evaluate, you will have to declare online on the EPSS you do not have a conflict of interest.**
- 2) You will then be able to access the proposal(s) information (title, abstract, Partners, budget, the CVs of the principal investigators and work package leaders in the proposal etc.) and to download the .pdf containing the project description on the EPSS.
- 3) After having read the proposal, you will have to enter and submit your final evaluation(s) onto the EPSS.

Please note that on the EPSS **you can save your review(s) several times but submit it/them only once.**

III. ASSESSMENT CRITERIA

Refer to the **Call Document 6 ‘Assessment criteria’** of the [Call documents](#)

Please note that:

- *Any project that does not fit within the scope of the call described will not be recommended for funding, regardless of its scientific quality;*

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 7b: Information and guidelines for the policy/management external reviewers

- *The external reviewers are invited to use the full range of scoring available to them.*

Annex 8: Guidelines for the Independent Observer

The requirement to provide an independent observer’s report on the evaluation is mandatory for all EC co-funded joint calls including co-funded joint call of Horizon Europe projects.

These guidelines cover:

1. The appointment of the independent observer
2. The process of carrying out the independent observer task (for EC co-funded joint calls)
3. A typical template for the observer’s report

1. Appointment of the independent observer

The independent observer will be appointed by the Call Steering Committee (CSC), ensuring he/she is not concerned by conflict of interests.

The Call Secretariat will ensure the independent observer has all the documents he/she needs to properly evaluate the evaluation process and will make all the necessary arrangements so that he/she can attend the main EvC meetings.

The travel, accommodation and meals expenses for the independent observer for attending the Evaluation Committee meeting(s) will be covered.

2. The process of carrying out the independent observer task

Whilst the main task of the observer is to attend the central evaluation and prepare an independent report it is important to consider, and make a judgement on, the whole evaluation process. This will normally include:

- **Review of the publications associated with the call**

The conclusion on compliance with EC co-funding rules and observations on the efficiency/quality of the evaluation process are the main requirements of the independent observer. An initial judgement on these can be made by reviewing the information and documents that are provided to guide the applicants.

- **Review of the selection process for evaluators and briefing materials**

The competence and balance of expert evaluators is absolutely critical to the quality and fairness of the evaluation and selection of proposals. It is important, therefore, that the observer fully understands the process and is provided with the necessary evidence to verify it.

- **Participation in the central evaluation as an observer**

The central evaluation is the main opportunity for the observer to formulate his or her conclusions on compliance with the EC co-funding rules and scope for process improvement.

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 8: Guidelines for the independent observer

● Preparation of the independent observer's report

The final stage of the observer's task is to prepare the report. The prepared draft should be submitted to the Call Secretariat and CSC to check for any factual errors before finalising and submitting to the European Commission. An example template for the report is provided below.

Example of a template for the observer's report

1. Introduction

- a. Overview of the call (e.g. objectives and scope)
- b. Terms of Reference for the independent observer
- c. Approach to the task

2. Observations on the Evaluation Process

- a. Stage 1 evaluation
- b. Selection and briefing of evaluators for Stage 2
- c. Remote evaluation
- d. Central evaluation
 1. Organisation & logistics
 2. Briefing of the evaluators
 3. Consensus meetings
 4. Ranking of the evaluated proposals

3. Overall Impressions

- a. Compliance with the rules for EC co-funding
- b. Conformity of the evaluation process witnessed with the published evaluation procedures
- c. Transparency, fairness and confidentiality of the selection process
- d. Efficiency and speed of the call/evaluation process
- e. Quality of the overall call/evaluation process

4. Summary of Recommendations

- a. Major issues
- b. Minor issues

3. Fee for carrying out the independent observer task

The independent observer will receive a fee that is fixed at a standard rate of 500 EUR. This rate is net of any taxes (however, social charges apply), under the French applicable law. The fee will be paid by the French Foundation for Research on Biodiversity (FRB), as the entity hosting the Biodiversa+ core secretariat.

Annex 9: Joint Controller Agreement



Stand-alone, attached document

MoU of the 2024-2025 Biodiversa+ Call on “Biodiversity and Transformative Change (BiodivTransform)” - Annex 10: Standard Contractual Clauses

Annex 10: Standard Contractual Clauses



Stand-alone, attached document