# How to Apply as a Partner: Horizon Europe – Pillar II

## General Information

**The Portal:** All project proposals must be submitted through the European Commission's *Funding & Tenders Portal* (herein called the *Portal*). The proposal Coordinator will complete and submit the proposal. **Access the homepage of the *Portal* here**.

**Application:** The proposal consists of two parts (details of each are given later in these instructions):
(1) **Part A: Administrative forms** (online, via the *Portal*)—includes *General Information*, *Participants*, *Budget*, *Ethics and security*, and *Other questions*.
(2) **Part B: Narrative part with 3 sections** that each correspond to an evaluation criterion—*Excellence*, *Impact*, and *Quality and efficiency of the implementation*. The template is downloaded from the *Portal Submission Service* (details below); the completed document is uploaded as a PDF.

## First Steps

**EU Login:** Each partner must have an EU Login account. At the top right of the *Portal* page, click the "Register" button. This will take you to the "Create an account" form—**use your work email**.

**Online Resources:** The *Online Manual* and *IT How To* wiki on the *Portal*, respectively, explain the business processes and the IT processes regarding preparing and submitting a proposal. The latter gives step-by-step instructions on what you need to do and when. This will be done by the proposal Coordinator. This *How to Apply* document includes links from *IT How To* that are relevant to partner organisations.

## How to Apply in 5 Steps

### 1. Find a suitable call for proposal

- The proposal Coordinator will select the call for proposal through the *Portal*—if you are joining a consortium, the call and topic may have already been selected; see role definitions here.
- Canadian entities are eligible to participate in calls under Pillar II: Global Challenges and European Industrial Competitiveness.
- Pillar II is organised into six clusters: (1) Health; (2) Culture, Creativity, and Inclusive Society; (3) Civil Security for Society; (4) Digital, Industry, and Space; (5) Climate, Energy, and Mobility; and (6) Food, Bioeconomy, Natural Resources, Agriculture, and Environment.
- Within each cluster are a number of call topics; topic pages include call-specific information, such as budget, conditions, and call documents.

### 2. Find partners

- A consortium made up of at least three participants is required for Pillar II calls, with at least one participant from an EU country and the other two from different EU or associate countries (e.g., Canada).
- If a consortium requires additional partners, the Coordinator can use the *Portal* to search for them.

## 3. Register your organisation

- The European Commission needs a 9-digit Participant Identification Code (PIC) as a unique identifier of each participating organisation.
- The University of Toronto is already registered; the PIC and other institutional information is listed below in Step 4B.

## 4. Submit your proposal (4 steps: Create proposal, Participants, Proposal forms, and Submit)

### A. Create your proposal

- The Coordinator will create the proposal on the *Portal*, which will open a new window called "Funding: Submission Service" (herein called the *Submission Service*).
- During this step, the Coordinator will enter their organisation information and a short summary of the proposal.

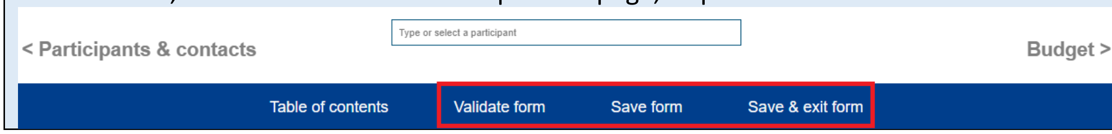
### B. Add participants

- During this step, the Coordinator will add partner organisations—provide the Coordinator with the information to be added to the following fields:
  - **UofT PIC:** 999845252
  - **Project Role:** *Main Contact;* each partner must list a *Main Contact*—for UofT, this would be the PI. The *Main Contact* for the partner will become a *Participant Contact* later on at the grant agreement preparation stage; additional *Contact Persons* should also be included
    - **Additional Contact Persons:**
      - Jeremy Knight; Director, Research Development; jeremy.knight@utoronto.ca
      - Cintia Cristia; Research Development and Partnerships Officer; c.cristia@utoronto.ca
  - **Access Rights:** *Participant Contact (full access)* or *Team Member (read-only access)*; *Main Contacts* can only be assigned full access, while *Contact Persons* can be assigned full or read-only access
  - **Name** and **Email Address** are then added; use the same email you used to create your EU Login account
  - In some cases, an *Affiliated Entity* can be added to a partner; see roles and access rights here
- When added as a contact, you will receive an email from the system; if you do not yet have an EU Login account, the system will send you an invitation and grant you access to the application after you create your account.
- Other institutional contact information (if needed):
  - **Institution Legal Name:** The Governing Council of the University of Toronto
  - **Signing Official:** Jeremy Knight; Director, Research Development; jeremy.knight@utoronto.ca
  - **Financial Contact:** Olga Ledeneva; Director, Research Financial Accounting & Audit; olga.ledeneva@utoronto.ca
  - **Institutional Contact:** Jeremy Knight; Director, Research Development; jeremy.knight@utoronto.ca

### C. Proposal forms—Part A

- Part A contains 5 forms: *General Information*, *Participants*, *Budget*, *Ethics and security*, and *Other questions:*
  - Only contacts with full access from the Coordinator organisation can modify these forms
  - Partners with full access can only edit the contact details and the budget table line corresponding to their own organisation (e.g., University of Toronto)
  - The rest of the participants can only preview the forms
- Follow the instructions on the *IT How To* "Proposal forms" page to access your proposal (after it has been created in Step 4A); after logging in to the *Portal*, in the left-hand menu under *Grants*, click *My Proposal(s)*; on the right-hand side, click on the "Actions" button and then "Edit Draft"—this will open up the *Submission Service.*

- To view the forms (or to edit organisational details in the case of contacts with full access), you must be on the “Proposal forms” page of the *Submission Service;* under “Administrative forms (Part A),” click “Edit forms”.

> **Note:** The *IT How To* page discusses the action buttons “Validate Form,” “Save,” and “Save&Close”—in the current form, these are located at the top of the page, as per the screenshot below:
>
> 
> 

## D. Proposal forms—Part B

- Part B is the narrative part of the proposal and has 3 sections**,** each corresponding to an evaluation criterion—*Excellence*, *Impact*, and *Quality and efficiency of the implementation*. Section 3 includes tables relevant to the call, including work packages, deliverables, milestones, and budget details, among others.
- Part B templates—application form and any applicable annexes—need to be downloaded from the *Portal Submission Service* (“Proposal forms” page), completed, converted to PDF (or other format, as indicated in the attachment info), then uploaded back to the *Submission Service*; instructions are on the *IT How To* “Proposal forms” page, Part B section.
- Collaborate with the proposal Coordinator and other partners on completion of Part B forms; only the Coordinator can upload the files.

> **Note 1:** *IT How To* states, “In the Part B and Annexes section, you will see a small coloured vertical line at the left side of the different fields to upload documents,” where green means complete and red means incomplete—in the current *Submission Service* page, there are no such vertical lines.
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> **Note 2:** *IT How To* discusses other forms that may need filling out (eg, Part C, MEDIA DB, GIS data)—these will be available to edit if required by the specific call.

## E. Submit

- Only the Coordinator can submit the proposal via the *Submission Service*; they can also continue to modify the proposal post-submission, as long as the call is still open.
- Submission and post-submission information is on the *IT How To* “Submit a proposal” page.
- *IT How To* suggests downloading your proposal following submission—please email a copy to the RSO office at horizon.europe@utoronto.ca for our records.

# 5. Follow up on your proposal

- Follow the instructions on the *IT How To* “Follow up your proposal” page.
- An evaluation committee reviews the proposals; applicants will receive a letter informing them about the outcome of their proposal and an evaluation report generally no later than six months after the call deadline.

## Deadlines

- **Notify the UofT Research Services Office (RSO):** ≥4 weeks before sponsor's deadline, notify us that you intend to be a partner on an application. Include the name and number of the funding topic (or a link to the topic page), details about the lead site, and details about any industrial partners involved. We will verify whether it is an eligible call; once confirmed, we will provide the correct institutional information to list on the application, including the PIC and the appropriate institutional contacts.
  - ***Editorial review:*** if you notify RSO ≥4 weeks before sponsor's deadline, you also have the option of requesting an editorial review from RSO staff. You will need to submit the draft no less than 4 weeks before the sponsor's deadline so that the editors have sufficient time to review and return to you.

- **Internal Deadline:** ≥6 business days before sponsor's deadline, complete an MRA for institutional approval—upload a copy of the budget, a statement of work (or copy of research proposal), and any documents that need institutional sign-off. If the lead site requires a confidentiality agreement to be signed at the application stage, the UofT PI must submit this through the *Non-Funded Research Agreement* module in My Research and advise our office. We will then advise our colleagues in IPO that the agreement has been submitted and ask them to expedite a review. Once the MRA reaches our office, we will review and provide institutional approval.

- **Lead Site's Deadline:** This will be communicated to you by the lead site and will depend on the sponsor deadline. As a partner, you can only edit your institution's contact details and the budget table line corresponding to UofT (Part A of the proposal, online). For Part B of the proposal (the narrative portion, with sections corresponding to evaluation criteria), work with the proposal Coordinator and other partners to complete these forms; only the Coordinator can upload the documents.

- **Sponsor Deadline:** Specific to the call—this can be found on the topic page in the *Portal*.

### Links of Interest

- EC Funding & Tenders *Portal*: Home
- EC Funding & Tenders *Portal*: *Online Manual* (general, not specific to Horizon Europe)
- EC Funding & Tenders *Portal*: *IT How To* (watch "Getting Started" video)
- EC Horizon Europe Programme Guide: Link
- Government of Canada: How to Apply
- HE Work Programme 2023-2024_13. General Annexes: Link (general conditions applicable to calls for grants under Horizon Europe)
- EU Grants: Annotated Grant Agreement: Link (includes, among other things, eligibility conditions for each budget category)
- DESCA Model Consortium Agreement: Link

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