Writing checklist for an effective proposal

Training #1: Access to public fundings and grants – Writing a winning proposal (Module 4, 5 & 6)

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Disclaimer: The information provided in this glossary are the most up to date at the time of publication of Training #1. Please note that European Commission portals, programs, and guidance documents are subject to periodic updates and revisions. Users are strongly advised to always verify the latest information directly on the official websites of the European Commission and other relevant funding bodies before preparing or submitting any proposal.

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How to use this checklist

This checklist aims to support you while drafting your proposal (Part B). For each item, do not simply check whether the information is present, but ask yourself whether it is clear, explicit, and aligned with the specific call text and evaluation criteria. If an item cannot be clearly answered with "yes" based on the text alone (without relying on implicit knowledge), this is usually a sign that the proposal needs strengthening or clarification.
This checklist is based on common proposal templates for Horizon Europe projects. Nevertheless, make sure to always download in advance the **specific proposal template for the call you intend to apply to**, and use it as the primary structural reference. This checklist is meant to complement the official template, not replace it.

Useful materials

There is no single official Horizon Europe writing guide: the following checklist is based on the combination of the Work Programme, the call-specific proposal template, and the evaluation criteria as reported below:

- Horizon Europe Programme Guide: Link
- Horizon Europe Work Programmes: Link
- Horizon Europe General Annexes: Link
- General application form[1]: Link
- General evaluation form[1]: Link

[1] Although templates are usually standard, each call may have specific requests. Make sure to check the specific requirements for the call you intend to apply to.

Writing checklist - Excellence

Objectives and ambition

- ☐ Briefly describe the technological, socio-economic and political context in which your project operates.
- ☐ Include one main project objective that summarises your overall concept
- ☐ Add several specific objectives that break it down further.
- ☐ Use Key Performance Indicators to make your objectives clear, realistic, and verifiable.
- ☐ Add a clear link with the goals and requirements of the call you are applying to. Make sure to cover all the aspects mentioned in the call.
- ☐ Describe the state of the art and highlight how the knowledge, technologies and solutions you are developing go beyond it.
- ☐ Include the TRL of your technology(ies) at the start and end of the project.

Methodology

- ☐ Describe the scientific and technical approach to your project
- ☐ Describe the methods and tools you'll use
- ☐ Describe why these methods are the best choice to achieve your results
- ☐ Include any links with national or internal projects whose results will feed into the project
- ☐ Include transversal methodological elements such as:
    - How the project will achieve an interdisciplinary approach
    - (If requested) how the project will incorporate Social Sciences and Humanities within the methodology and/or how citizens, civil society and end users will be engaged.
    - (If requested) how the project will leverage on digital technologies
    - How gender aspects will be considered in R&I content
    - How the project will comply with high-quality open science practices and research data management

Common mistakes to avoid

- Being too vague or generic. Avoid buzzwords without explaining what they mean.
- Not clearly linking your project to the specific scope of the call.
- Failing to explain how your solution improves on what already exists.
- Forgetting to highlight the European dimension of your project and how it benefits Europe as a whole.
- Ignoring the requests in the official template. Always read it carefully and answer every question it includes.
- Not checking if the template has been updated for your specific call. Always download the latest version from the Funding & Tenders Portal.

Writing checklist - Impact

Project's pathways towards impact

- ☐ Start with the expected outcomes listed in the call text: look at those outcomes and describe how your project will contribute to achieving them.
- ☐ Do not forget to give an indication of the scale and significance of the project's contribution to the expected outcomes.
- ☐ Talk about wider impacts in the longer term, as specified in the destination part of the Work Programme.
- ☐ Include also economic and societal impacts.
- ☐ Be transparent on possible barriers - arising from factors beyond the scope and duration of the project - that may determine whether the desired outcomes and impacts are achieved and define mitigation actions.

Measure to maximise your impacts

- ☐ Identifies the project target audiences
- ☐ Defines communication and dissemination activities specific to each target audience.
- ☐ Quantifies through KPIs all the activities listed.
- ☐ Include how you'll exploit your results and how you'll manage your intellectual properties. This is particularly relevant for IA project, although it should be included in RIA projects as well.

Common mistakes to avoid

- Writing statements without numbers or evidence. Be as quantitative as possible!
- Focusing only on scientific impacts and overlooking social, economic or environmental contributions
- Forgetting about the importance of a solid and quantitative plan for dissemination, exploitation, and communication
- Not showing how the project connects to broader EU policies and goals, including work programme destinations
- And, finally, forgetting to check the call requirements and proposal template and answer all its specific questions

Writing checklist - Implementation

Work plan

- ☐ Briefly describe how you work plan is structured and how different WPs are interlinked.
- ☐ Include a PERTT chart for more clarity.
- ☐ For each WP, make sure to include:
    - Who will be responsible for the overall WP and each task
    - Who will participate in the WP and in the different tasks
    - The overall objective of the WP
    - When it starts and when it ends
    - The effort in terms of Perms Months
    - The description of the tasks
    - Milestones
    - Deliverables
    - Significant risks that may hinder the implementation of your work and what steps you'll take to reduce their impact on the project.

→ The official template includes specific tables for many of these items. Make sure to follow them!

Budget

- ☐ Highlight any costs related to subcontracting items and provide a justification on why you need it.
- ☐ Include a description of purchase costs (travel and subsistence, equipment, and other goods, works, and services) for partners whose purchase costs exceed 15% of their personnel costs.
- ☐ If foreseen, include a justification for the other costs categories items.
- ☐ If foreseen, include a justification for the in-kind contributions.

→ The official template includes specific tables for all these items. Make sure to follow them!

Capacity of participants and consortium as a whole

- ☐ Highlight the role and capacity of each participant and how the consortium as a whole brings together all the necessary expertise.
- ☐ Show how the partners will have access to critical infrastructure needed to carry out the project activities.
- ☐ If applicable, describe the industrial/commercial involvement in the project to ensure exploitation of the results.
- ☐ You may use this section to describe Advisory Board members if relevant for your project.