**University of Calgary International**

# Horizon in a Hurry

## The 7-Page Essential Starter Guide to EU Research Funding

Welcome to our comprehensive guide on Horizon Europe (HE) funding. Canada's recent associate country status within HE marks a significant milestone for our research community. This new status opens doors for Canadian researchers to participate in Pillar II: Global Challenges & European Industrial Competitiveness, part of the EU's €95.5 billion research and innovation program.

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**ucalgary.ca/international**

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# Understanding Horizon Europe

**Objectives:**
I.     Deepen the general understanding of this complex funding program;
II.    Help researchers and administrators navigate the procedure for applying for its various calls; and
III.   Provide hands-on advice informed by the experience of specialist administrators, consultants and researchers.

Horizon Europe stands as the world's largest research and innovation funding initiative. Canada's elevation to associated country status builds upon our already strong foundation as the third-most active non-associated member, following only the US and China. This new status brings both opportunities and responsibilities.

The European approach to research funding differs significantly from Canadian systems. Projects must adhere to specific European administrative protocols, with continuous technical and financial reporting requirements. Unlike traditional Canadian grants, *HE funding operates on a reimbursement model, where detailed documentation of expenses, including staff timesheets, is essential for accessing funds.*

## Critical requirements:
- All expenses must be eligible and documented for reimbursement
- Regular technical and financial reporting is mandatory
- Detailed timesheets and activity records must be maintained
- Institutional budget review required before submission
- Review of research security requirements and vetting of partners/collaborators is mandatory before submission of the grant

# Purpose

This quick look-up guide is designed to help you walk through the program's fundamentals and access basic tips for the application process with confidence, and benefit from the practical insights and resources provided.

> UCalgary researchers must carefully assess the human resources and skills required to successfully conduct the project and then prepare their project budget accordingly. This also ensures that administrative tasks are handled in a timely and efficient manner throughout the project lifecycle post-award. Moreover, RSO must review the first draft of the proposed budget (and other sections of the application) at least one month prior to its submission to provide feedback and ensure that all expenses are eligible.

# Navigating Pillar II

## Eligibility Criteria

The program welcomes participation from across Canada's research ecosystem. Universities, research institutes, non-profits, SMEs, and industries can all participate, and are encouraged, with university faculty members and researchers having equal standing to their EU counterparts. *Importantly, the previous requirement for matching financial contributions from Canadian participants has been eliminated.*

## Pillar II Program Structure

Pillar II operates through collaborative projects identified by the European Commission (EC). It is divided into six clusters (Table 1), with each cluster divided into numerous destinations. In addition, each destination is made up of specific research topics, which are launched as calls for i) research and innovation actions (RIA), ii) innovation actions (IA), or iii) coordination and support actions (CSA).

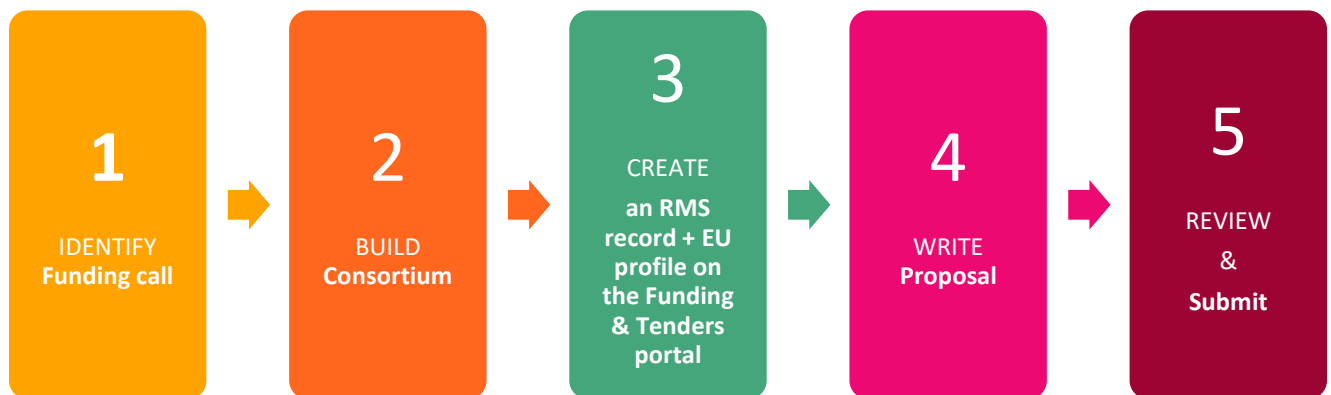| Cluster | Name |
|---|---|
| Cluster 1 | Health |
| Cluster 2 | Culture, Creativity and Inclusive Societies |
| Cluster 3 | Civil Security for Society |
| Cluster 4 | Digital Industry and Space |
| Cluster 5 | Climate, Energy and Mobility |
| Cluster 6 | Food, Bioeconomy, Natural Resources, Agriculture and Environment |

*Table 1 – Horizon Europe Pillar II Clusters*

Topics of interest are identified two years in advance by the European Commission and updated every two years. **Calls for 2025-2026 will open in April – May 2025**. Researchers can use this time to talk to their international partners about interest in Horizon Europe and work with UCalgary International to identify upcoming funding topics of interest that they may be considering applying to as we have access to draft (unpublished) versions of some HE topics for 2025. Pillar II mostly focuses on Technology Readiness Level 2-8 initiatives (i.e., not high-risk projects) implemented through two main mechanisms: Research and Innovation Actions (RIA) and Innovation Actions (IA) (Table 2).

| Type of Action | Funding Scheme |
|---|---|
| **Research & Innovation Actions (RIA)** | <ul><li>Research and Innovation Actions (RIA) projects focus on groundbreaking exploration and innovation, where you can pursue new scientific discoveries, test promising technologies, or develop innovative solutions that could transform products and services.</li><li>Your research can start at the early stages of development - perfect for exploring bold ideas and testing their potential.</li><li>Building your team requires joining forces with at least two other partners from different eligible countries, making sure at least one is from an EU member state. This partnership model encourages diverse perspectives and strengthens your research impact.</li><li>When it comes to funding, RIA projects offer robust support for your work. You'll receive full coverage (100%) of your eligible direct costs, plus an additional 25% to handle indirect expenses.</li></ul> |
| **Innovation Actions (IA)** | <ul><li>Innovation Actions (IA) projects turn promising research into real-world solutions. These projects focus on advancing mature technologies and ideas closer to market readiness. You will be developing prototypes, conducting pilot studies, testing innovations at scale, and exploring how to bring your solutions to market to transform theoretical possibilities into practical applications.</li><li>Like other Horizon Europe projects, a dynamic team is required to answer the funding call or topic. Partner with at least two other organizations from different eligible countries, ensuring at least one partner comes from an EU member state. This collaboration model helps bridge the gap between research and practical implementation.</li><li>The funding structure for IA projects reflects their market-oriented focus. *Universities and other not-for-profit organizations receive full funding – that is 100% of your eligible direct costs*, plus 25% for indirect expenses. For-profit partners receive 70% of their direct costs (note: some co-programmed partnerships offer 60%), plus the same 25% indirect cost coverage.</li></ul> |

*Table 2 – Types of Action*

With a competitive success rate of approximately 15%, strong and diverse partnerships are crucial. While the minimum requirement to build a consortium is three partners, successful consortia typically involve 8-12 partners collaborating over three to five years.

# Steps to Applying

| 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|
| IDENTIFY **Funding call** | BUILD **Consortium** | CREATE **an RMS record + EU profile on the Funding & Tenders portal** | WRITE **Proposal** | REVIEW & **Submit** |

## Application Process Overview

The journey from concept to submission follows a clear pathway: identify a suitable call, build your consortium, create your EU profile, develop your proposal, and submit for review.

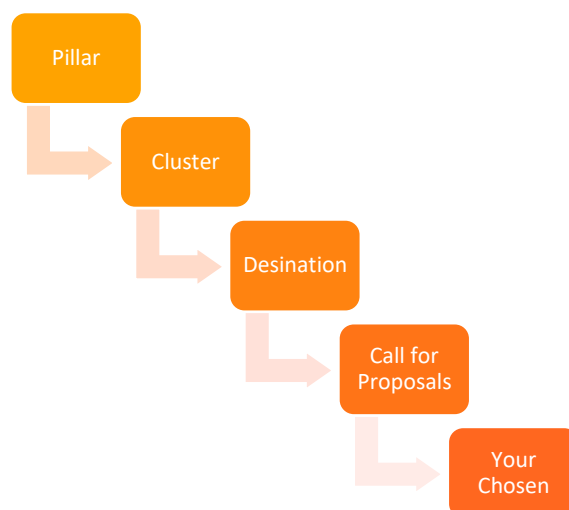**Starting early: experience shows that competitive proposals typically require 6-8 months of development time.**

# Detailed Application Guidelines

## Finding Your Call

The Funding and Tenders Portal serves as your gateway to opportunities*. The five-level competition structure helps narrow down specific opportunities aligned with your research interests.

**\*Specialist support teams in UCI and RSO can help you navigate the funding topics, policies and associated documentation, as requirements can vary significantly between calls.**

```
Pillar
   → Cluster
        → Desination
             → Call for Proposals
                  → Your Chosen
```

## Building Your Consortium

A strong consortium forms the backbone of any successful proposal. The minimum requirement calls for three partners: at least one organization from an EU member state, plus two more from either EU member states or associated countries like Canada*.

**\*Consider including partners from different sectors to strengthen your proposal's impact.**

Consequently, researchers must find several project partners. HE calls are collaborative projects leading to interdisciplinary teams and the size of the consortium depends on the nature of the proposal. Moreover, a consortium must include partners from different countries with the option to include different sectors (e.g., non-profits, SMEs, industries). Organizations from outside the EU or from countries not associated with HE can participate but are not eligible for funding.

Researchers must start the search for partners (international and national) early in the process. The European Commission provides tools, such as the Partner Search platform, to identify organizations based on their profile or previous participation.

The consortium must be led by a coordinator, who is responsible for developing the consortium and managing the proposal submission process.

Building new and leveraging existing strong international connections is vital for success in Horizon Europe. We strongly encourage researchers to participate in European matchmaking and brokerage events specifically created for Horizon Europe, where you can meet potential consortium partners face-to-face and showcase your expertise. These events often lead to direct invitations to join consortia and offer invaluable insights into emerging research priorities.

To support your HE networking efforts, consider applying for the University's Connector Grants program. This program provides travel funding for researchers engaged in transdisciplinary initiatives and international partnership development including Horizon Europe.



This funding can cover your travel and attendance at Horizon Europe brokerage events, consortium planning meetings, and related networking activities in Europe.

For more information about travel support, visit the [transdisciplinary connector grants web page](#).

While UCalgary can be the coordinator/lead institute, a lead organization who has prior experience with Horizon Europe program requirements is better positioned to take on this complex (mostly administrative) responsibility.

## EU Profile Setup

Before proceeding with any submission, you will need to establish your presence on the EU platform. Create your EU login account and link it to our institution using the **University PIC: 998757203**. This connection ensures proper institutional affiliation throughout the process.

## Proposal Development

Once the consortium members are finalized, the coordinator and partners must write a proposal. The proposal is divided into two parts: (Part A) administrative and (Part B) technical and research.

The proposal consists of two distinct parts:

**Part A** covers administrative elements, including participant data, legal declarations, budgets, and various required plans (Gender Equality, Ethics and Security self assessment).

Extra marks are granted for having a gender-balanced consortium.

**Part B** focuses on your research project, *detailing excellence, impact, open science, communication strategy*, and various cross-cutting considerations.

Success factors:
- Include dedicated administrative support in your budget
- Ensure consortium gender balance for additional scoring points
- Plan for open data sharing (for non-sensitive calls)
- Frame project impact from an EU perspective
- Demonstrated consideration of research security risks and mitigation measures

## Review and Submission Process

Plan to submit at least 48 hours (in the EU submission portal) before the deadline to avoid technical issues.

We recommend arranging for external review by asking peers outside the consortium, ensuring your proposal's impact and objectives are comprehensible to non-experts. Remember that sensitive research projects will undergo additional security review.

Note: The next Work Programme announcement is expected in spring 2025, with the final HE Work Programme following in 2026-2027.

## Additional Resources

ISED webpage on Horizon Europe

UCalgary International Horizon Europe Website

STI Guide for Canadians - Horizon Europe.pdf

## Contact Us

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