



Experts and Evaluation

Guidelines for the evaluation of SMART Project Outlines and Full Project Proposals

GUIDELINES

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SMART Office

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Purpose of this document

This document consolidates the current procedural and content guidance for SMART proposal evaluation and serves as the reference for the evaluation process.

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1. Purpose and scope

This document establishes the basis for the participation of experts in the evaluation of proposals submitted to the SMART EUREKA Cluster. It describes the evaluation process, the selection and assignment of experts, the required standards of conduct and quality, the use of the online evaluation platform, and the criteria applied at Project Outline (PO) and Full Project Proposal (FPP) stages.

The provisions apply to all experts appointed to evaluate SMART proposals, including members of the SMART Technical Committee who act as evaluators and prepare Evaluation Summary Reports (ESRs).

2. Overall evaluation process

2.1 Two-stage call process

SMART periodically organises calls for collaborative R&D&I projects in advanced manufacturing. The call process follows two stages and is designed to combine an efficient timetable with a high-quality evaluation procedure.

2.1.1 Project Outline (PO)

The PO provides a concise overview of the project concept, objectives, expected impact and proposed consortium, even where all details have not yet been fully settled. It enables an early assessment and allows recommendations to be provided before preparation of the FPP.

The PO stage is mandatory. In exceptional cases, participants may submit a Full Project Proposal directly. The current wording and call arrangements are published on the [SMART Call Process page](#).

2.1.2 Full Project Proposal (FPP)

Consortia invited to the FPP stage submit an FPP. The FPP provides the detailed project content, implementation plan, consortium responsibilities, market rationale, technology approach, budget and management arrangements. The recommendations issued at PO stage should be addressed in the FPP.

Following FPP evaluation, the Technical Committee submits its recommendations to the SMART Board. The Board decides whether the proposal receives the SMART label, taking account of the technical evaluation and the feedback of the relevant Public Authorities.

2.2 Evaluation pathway

The same core pathway applies at both PO and FPP stages, with the depth and content of the assessment adapted to the corresponding evaluation form.

1

Initial check: The SMART Office checks completeness, eligibility, relevance to the SMART scope and, where applicable, engagement with the relevant Public Authorities.

2

Assignment of experts: Two experts are assigned to every proposal at both PO and FPP stages. One of the two experts is always a member of the SMART Technical Committee.

3

Online evaluation: The proposal and supporting documents are reviewed and the required comments, scores and recommendations are entered directly in the Cluster Projects Tool. Word evaluation forms are not used and completed evaluations are not returned by email.

4

Evaluation Summary Report: The Technical Committee expert (Rapporteur) prepares the ESR, consolidating the main findings of the evaluation process.

5

Decision and feedback: The ESR supports the discussions and decisions of the Technical Committee, Public Authorities and SMART Board, as applicable. It is also provided to the consortium as the formal feedback from the evaluation process.

2.3 Roles in the evaluation process

Role	Main responsibilities
SMART Office	Performs the initial checks; confirms expert availability; assigns proposals; provides platform access and instructions; monitors deadlines; supports evaluators; and performs quality-control checks.
Two assigned experts	Assess the proposal independently and objectively, enter comments and ratings in the platform, and provide a reasoned final recommendation.
Technical Committee expert (Rapporteur)	Acts as one of the two evaluators and is responsible for preparing the ESR on the basis of the complete evaluation record.
Technical Committee	Reviews the evaluation results and formulates recommendations at the relevant call stage.
Public Authorities	Provide country-specific feedback regarding priorities, eligibility and funding considerations and receive the ESR for the proposals involving their countries.
SMART Board	Decides on the labelling of FPPs on the basis of the applicable evaluation and governance process.

3. Becoming a SMART expert

3.1 Eligibility criteria

Candidates are expected to meet the following criteria:

- A university-level degree or equivalent professional qualification.
- A high level of expertise in one or more advanced manufacturing fields.
- Experience in R&D&I projects, including participation, management or evaluation.

- Availability for occasional short-term assignments within strict deadlines.
- A good command of written English.
- Sufficient digital skills to work securely in the online evaluation platform.

3.2 Application procedure

Candidates interested in joining the SMART expert panel should submit an English-language curriculum vitae to experts@smarteureka.com. A single file in Word or PDF format should be provided. Europass format may be used, although other clear professional formats are accepted.

Additional information may be requested regarding expertise in SMART technology domains, industrial and market experience, previous project-evaluation work and any other element relevant to the assessment of the candidate profile.

3.3 Acceptance to the expert panel

Acceptance to the SMART expert panel is granted through the applicable SMART governance procedure after review of the candidate profile. Accepted candidates receive confirmation by email. Inclusion in the panel does not guarantee the assignment of proposals in every call.

4. Selection and assignment of experts

4.1 Availability

Shortly before each submission deadline, experts may be contacted to confirm their availability and willingness to perform evaluations. Experts who confirm availability are included in the list of candidates for that evaluation period.

4.2 Selection

Once ineligible or out-of-scope submissions have been filtered out, the SMART Office matches each proposal with experts whose knowledge and experience best fit the technical, market and industrial content of the proposal. The Technical Committee may support this matching process where necessary.

Two experts are selected for each proposal in both phases, and at least one of them must be a Technical Committee member. Reserve experts may also be identified to ensure continuity if an assignment cannot be accepted or completed.

An available expert may receive several assignments or no assignment. This may result from the number and subject matter of the proposals, the balance of workload, conflict-of-interest considerations or the availability of a more closely matched profile.

4.3 Assignment and platform access

Each assignment is confirmed by email. The communication specifies the proposal, the evaluation stage, the applicable deadline and any additional instructions. The proposal and the evaluation form are made available through the Cluster Projects Tool.

Receipt of the assignment must be acknowledged promptly. Any inability to complete the work within the specified period must be communicated immediately so that alternative arrangements can be made.

5. Performing an evaluation

5.1 General requirements

- Evaluations must be performed in English.

- The complete proposal and all relevant annexes must be reviewed before scores and conclusions are finalised.
- Comments, ratings and recommendations must be entered directly in the online platform.
- The evaluation must be independent, objective, evidence-based and free from prejudice.
- The full rating scale must be used appropriately; scores must not be clustered around the middle without justification.
- Every rating must be supported by comments that are specific to the proposal and consistent with the score awarded.
- Confidentiality and information-security requirements apply during and after the assignment.

5.2 Recommended working sequence

Step	Action
1	Confirm the assignment and review the deadline.
2	Check for any actual, potential or perceived conflict of interest before beginning the assessment.
3	Read the proposal, annexes and available financial or partner information in full.
4	Assess each main section and its associated fields using the guidance provided in the platform.
5	Enter clear comments and select a rating for each scored main section.
6	Complete the conclusions and recommendations after all substantive sections have been assessed.
7	Select the final recommendation: invitation to FPP at PO stage or labelling at FPP stage.
8	Check completeness, consistency, language and confidentiality before submitting the evaluation in the platform.
9	Where acting as the Technical Committee expert, prepare the ESR after both experts have completed their assessments.

5.3 Deadlines and availability changes

Evaluation deadlines are specified in the assignment communication and take precedence over general guidance. The evaluation window is normally measured in days or weeks rather than months. As an indicative reference, a single evaluation may be assigned with approximately five to seven days for completion, while several evaluations may require a coordinated timetable.

Personal or national holidays cannot normally be taken into account once an assignment has been accepted. Where circumstances change, the SMART Office must be informed as soon as possible. If progress cannot be confirmed or the evaluator cannot be reached, the assignment may be withdrawn and transferred to a reserve expert.

6. Quality standards and code of practice

6.1 Useful and relevant output

Evaluation comments form the basis of the consolidated feedback provided through the ESR. They must therefore be coherent, relevant, constructive and sufficiently specific to support the conclusions reached. Direct criticism is acceptable where it is fair, professional and supported by the proposal content.

Weaknesses that affect eligibility, credibility, feasibility, impact or labelling prospects must be clearly identified. Generic statements, formulaic text and comments copied from guidance documents or unrelated sources are not acceptable.

6.2 Expected quality

Evaluations are expected to meet a consistently high standard. Where an assessment is incomplete, contradictory, insufficiently justified or otherwise below the required standard, the evaluator may be asked to revise it. Continued failure to meet the required quality may result in refusal of compensation and removal from future assignments.

6.3 Code of practice

- Applications are evaluated independently and objectively.
- Sufficient time and attention are devoted to the complete proposal.
- Scores reflect the evidence in the proposal and use the entire 1-5 scale where appropriate.
- Comments clearly justify the rating awarded to the corresponding main section.
- Scores, comments, conclusions and final recommendations are mutually consistent.
- The assessment remains focused on the proposal under review and avoids unsupported assumptions.
- The confidential nature of the proposal, evaluation and deliberations is maintained at all times.

6.4 Use of artificial intelligence

Artificial intelligence tools must not replace the expert's own reading, analysis or judgement. Experts may not use AI to summarise or assess a proposal, generate evaluation comments, scores or recommendations, or otherwise perform substantive parts of the evaluation on their behalf.

Confidential proposal content or personal data must not be uploaded to external AI tools. AI may be used for general information searches or to improve the language, grammar or clarity of the expert's own text, provided that no confidential information is disclosed and that the expert verifies the resulting output and remains fully responsible for the final evaluation.

7. Evaluation output and Evaluation Summary Report

7.1 Online evaluation record

Each expert completes the applicable PO or FPP form in the Cluster Projects Tool. The online record contains the section ratings, qualitative comments, conclusions, recommendations and final Yes/No recommendation. No separate Word evaluation template is completed or returned by email.

The individual evaluation records are internal working documents. They support the preparation of the ESR and the subsequent review by the SMART bodies involved in the call process.

7.2 Evaluation Summary Report (ESR)

The Technical Committee expert assigned to the proposal is responsible for preparing the ESR after completion of the two expert assessments. The ESR constitutes the formal consolidated record of the evaluation process.

The ESR should:

- Present the main strengths and weaknesses of the proposal in a balanced manner.
- Reflect the ratings and substantive findings recorded during the evaluation.
- Identify mandatory and recommended improvements, where applicable.
- State and justify the final recommendation for the relevant stage.
- Resolve or clearly address any material divergence between the two assessments before finalisation.
- Avoid disclosing evaluator identities or including internal comments that are not appropriate for external feedback.

External feedback

The ESR is provided to the relevant Public Authorities and to the project consortium. It is the formal feedback document from the SMART evaluation process.

8. Confidentiality, data protection and information security

8.1 Confidentiality within SMART

SMART applies a peer-review approach while protecting the identity of evaluators and the confidentiality of proposals and assessments. Access to individual evaluation records is restricted to persons who require the information for the evaluation, governance, audit or programme-review process.

Such access may include the SMART Office, Technical Committee members, relevant Public Authorities, the Eureka Secretariat, authorised auditors and organisations or individuals formally appointed to assess the performance of the SMART programme. Applicable confidentiality obligations must be respected in every case.

The participation of an expert in the evaluation of a specific proposal is not publicly disclosed. Where references are requested, confirmation may be limited to whether evaluation work has been performed, without endorsement of the expert or disclosure of particular assignments.

8.2 Obligations of experts

- All proposal data, documents, deliberations and evaluation records must be treated as confidential during and after the assignment.
- Proposal content may not be copied, disclosed, discussed or used for any purpose outside the evaluation process.
- Access credentials must not be shared and the platform must be accessed only through secure devices and connections.
- Any local copy created for the assessment must be protected and securely deleted when it is no longer required.
- A suspected loss, disclosure or unauthorised access must be reported immediately to the SMART Office.

A breach of confidentiality or information-security obligations may lead to suspension of compensation, exclusion from the expert panel and, in serious cases, legal action.

8.3 Data protection

Personal data supplied by experts are processed for the administration of the expert panel, assignment of evaluations, payment and programme management. Processing is carried out in accordance with the applicable European Union and Spanish data-protection framework. Questions concerning the processing of personal data may be addressed to the SMART Office at info@smarteureka.com.

9. Conflict of interest

9.1 General principle

Any circumstance that compromises, may compromise or could reasonably appear to compromise impartiality must be declared immediately. A conflict may become apparent before or after an assignment has been accepted. Early disclosure allows the proposal to be reassigned without prejudice to future participation in the expert panel.

Failure to declare a known conflict of interest is treated as a serious breach. Consequences may include exclusion from future SMART or Eureka evaluation work, reimbursement of fees and notification of the relevant Public Authorities or ministries.

9.2 Situations requiring assessment

Category	Examples
Disqualifying	The expert was involved in preparing the proposal; stands to benefit directly from its acceptance or rejection; has a close family relationship with a person representing an applicant; is a director, trustee or partner of an applicant entity; is employed by an applicant entity; or is in another situation that prevents objective evaluation.
Potentially disqualifying	The expert was employed by an applicant entity within the previous two years; is or recently was involved in a contract or research collaboration with an applicant entity; or is in another situation that could cast doubt on impartiality in the eyes of an informed external party.

An expert must not have submitted or otherwise be involved in a proposal being assessed during the relevant evaluation period. Any doubt must be referred to experts@smarteureka.com before the evaluation proceeds.

10. Compensation and quality control

Expert evaluators are compensated in accordance with the applicable provisions of the SMART Rules and Regulations and the instructions communicated for the assignment.

Submitted evaluations may be selected for quality control. Where amendments are required, the evaluator must correct and resubmit the assessment within the requested period. Compensation may be withheld where substantive quality issues remain unaddressed.

11. Evaluation framework and rating scale

11.1 Common rating scale for PO and FPP

Score	Rating	Definition
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Score	Rating	Definition
1	Very low	Unacceptable or missing
2	Low	Insufficient, lacking or inadequate
3	Satisfactory	Sufficient quality
4	Good	High quality
5	Excellent	Outstanding work

A numerical rating is selected only for the main sections that include a rating field in the platform. The associated text fields provide the evidence and reasoning underpinning the main-section score. Final invitation or labelling recommendations are recorded separately as Yes/No decisions and must be justified.

11.2 Rating principles

- A score of 1 is appropriate where the relevant content is unacceptable or absent.
- A score of 3 indicates that the section reaches a sufficient standard but may still require improvement.
- A score of 5 is reserved for outstanding work and should not be used merely because no major weakness has been identified.
- The score must reflect the section as a whole, taking account of all associated fields.
- Positive comments paired with a low score, or substantial weaknesses paired with a high score, must be avoided unless the apparent inconsistency is explicitly explained.

12. Project Outline evaluation

12.1 Purpose of the PO evaluation

The PO evaluation determines whether the project idea is sufficiently relevant, credible and promising to be invited to prepare an FPP. The assessment should identify the main strengths and weaknesses and provide clear mandatory and recommended improvements for the next stage.

12.2 PO evaluation form

Section	Fields / assessment focus	Rating
Project overview	Project data automatically displayed in the platform.	Not scored
Relevance to the SMART programme	Comments on fit with SMART scope and objectives.	Main section
Conclusions	Plus; Minus. This section should be completed after the substantive assessment.	Not scored
Recommendations for FPP	Mandatory improvements; Recommended improvements.	Not scored
Rationale of the project	One-page description; Problem statement and market value chain; Project innovations and technology value chain/solutions.	Main section

Section	Fields / assessment focus	Rating
Market and societal targeted impact	Expected impact and exploitation opportunities; Market analysis; Consortium market access; Partner market access; Contribution to UN Sustainable Development Goals.	Main section
Technology	Summary of technological innovation and novelty in relation to the state of the art and strategic relevance; State-of-the-art analysis.	Main section
Consortium overview	Consortium roles and contributions; Partner descriptions/profiles; Cooperation added value at business level; Cooperation added value at technology level.	Main section
Writing quality	Readability; Focus and conciseness.	Main section
Additional remarks	Any relevant comment not appropriately covered elsewhere.	Not scored
Recommendation to invite for FPP	Yes / No.	Final decision
Summary and justification for FPP recommendation	Concise justification of the final recommendation.	Not scored

12.3 PO conclusions and recommendations

The Plus and Minus fields should summarise the overall strengths and weaknesses after all scored areas have been assessed. Mandatory recommendations should identify changes required for a credible FPP. Recommended improvements should identify measures that would strengthen the proposal but are not necessarily conditions for progression.

The final Yes/No recommendation must be consistent with the scores, comments and seriousness of any mandatory improvement. The summary should explain the basis for the recommendation in clear terms suitable for consolidation in the ESR.

13. Full Project Proposal evaluation

13.1 Purpose of the FPP evaluation

The FPP evaluation determines whether the fully developed proposal merits the SMART label. It requires a detailed assessment of the project rationale, market and societal impact, technology, consortium, implementation approach and writing quality.

13.2 FPP evaluation form

Section	Fields / assessment focus	Rating
Project overview	Project data automatically displayed in the platform.	Not scored
Conclusions	Plus: overall positive aspects and main strengths. Minus: overall negative aspects and main weaknesses. This section should be completed at the end.	Not scored

Section	Fields / assessment focus	Rating
Recommendations	Key aspects to be improved.	Not scored
One-page description	Is there a clear and convincing one-page description of the project?	Not scored
Rationale of the project	Problem statement; Solution concept; Expected project outputs.	Main section
Market and societal targeted impact	Market analysis; Market value chain; Consortium market access; Partner market access; Contribution to UN Sustainable Development Goals.	Main section
Technology	State-of-the-art analysis; Summary of technological innovation and novelty in relation to the state of the art and strategic relevance; Quantified KPIs including dissemination; Technology value chain/solutions.	Main section
Consortium overview	Partner descriptions; Consortium roles and contributions; Cooperation added value at business level; Cooperation added value at technology level.	Main section
Realisation	Project structure; Main milestones; Work-package description and summary of effort allocation per work package; Deliverables.	Main section
Writing quality	Readability; Focus and conciseness.	Main section
Additional remarks	Any additional comment not covered above that should be communicated to the evaluation committee.	Not scored
Recommendation for labelling	Yes / No.	Final decision
Short summary and justification for the labelling recommendation	Concise justification of the final recommendation.	Not scored

13.3 Detailed guidance for FPP sections

Area	Guiding question
Rationale - Problem statement	Is the problem or need clearly described, and does the consortium demonstrate a solid understanding of the context?
Rationale - Solution concept	Is the project idea convincing, and does the proposed solution effectively address the identified problem or need?
Rationale - Expected outputs	Are the project outputs clearly defined?
Impact - Market analysis	Is the analysis clear, relevant and focused, including trends, competitors and potential threats? Is the industrial impact clear and credible?
Impact - Market value chain	Are the processes for developing, producing and delivering the product or service clearly described?

Area	Guiding question
Impact - Consortium market access	Is the consortium well positioned to achieve significant exploitation results and does it demonstrate credible access to the target markets?
Impact - Partner market access	Does each partner have adequate capabilities and positioning to reach the target market?
Impact - UN SDGs	Does the proposal demonstrate a clear contribution to sustainability and relevant Sustainable Development Goals?
Technology - State of the art	Is the analysis clear, relevant and up to date?
Technology - Innovation and novelty	Is the level of innovation clearly described? Is the novelty compared with the state of the art significant, and is the strategic relevance well justified?
Technology - KPIs and dissemination	Are clear and measurable KPIs defined to assess success? Is there a credible dissemination and communication strategy?
Technology - Value chain/solutions	Is the technology value chain clearly described and coherent?
Consortium - Partner descriptions	Are partner capabilities and strengths clearly described? Are relevant aspects such as gender balance appropriately considered?
Consortium - Roles and contributions	Are roles clearly defined? Are partners complementary and well balanced? Is the international collaboration strong and meaningful?
Consortium - Business added value	Does cooperation create clear business added value? Are there gaps or overlaps?
Consortium - Technology added value	Does cooperation create clear technological added value? Are there gaps or redundancies?
Realisation - Project structure	Is the project logically structured and feasible?
Realisation - Milestones	Are milestones clearly defined and appropriate for monitoring project progress?
Realisation - Work packages and effort	Are work packages and tasks clear? Are partner contributions well defined? Are effort and cost allocations realistic and consistent?
Realisation - Deliverables	Are relevant deliverables defined, and is their number reasonable and appropriate?
Writing quality - Readability	Is the proposal clear, coherent and well written?
Writing quality - Focus and conciseness	Is the proposal focused and concise? Does it avoid unnecessary detail and comply with length requirements?

13.4 FPP recommendation and ESR

The recommendation for labelling must be based on the proposal as submitted and must be consistent with the six scored main sections. Recommendations for improvement may be included even where labelling is supported. Where labelling is not supported, the principal reasons must be stated clearly and linked to the substantive evaluation findings.

The Technical Committee expert consolidates the two evaluations in the ESR. The short summary and justification in the platform should therefore be drafted with sufficient clarity to support an accurate and useful consolidated report.

14. Final submission checklist

Check	Confirmation
Conflict of interest	No actual, potential or perceived conflict remains undeclared.
Completeness	All mandatory fields, scores and final recommendations have been completed.
Evidence	Comments refer to the proposal content and explain the reasons for the score.
Consistency	Scores, comments, conclusions, recommendations and the final Yes/No decision are aligned.
Specificity	Generic, copied or formulaic comments have been removed.
Language	The evaluation is clear, professional and written in English.
Confidentiality	No inappropriate internal information, evaluator identity or third-party confidential material has been included.
Platform submission	The final review has been completed before selecting Submit.
ESR responsibility	Where applicable, the Technical Committee expert has prepared a balanced ESR based on the two assessments.

15. Contact

Questions concerning assignments, conflicts of interest, technical access, deadlines or evaluation requirements should be addressed to:

SMART Office
experts@smarteureka.com | www.smarteureka.com