



Project Outline Proposer's Guide

Guidance for preparing and submitting a SMART Project Outline (PO)

GUIDE

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SMART Office

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1. Purpose and role of the Project Outline

The Project Outline (PO) is the first stage of the normal SMART call process. It provides a concise overview of the project concept, objectives, innovation, expected impact, consortium and implementation approach while allowing some elements to remain under development.

The PO supports early technical evaluation, preliminary discussions with National Funding Authorities (NFAs) and early feedback to the consortium. Projects invited to the next stage receive recommendations and improvements to be addressed when preparing the Full Project Proposal (FPP).

Key principle

A PO is not a shortened FPP. It should provide enough evidence to judge relevance, credibility, market potential, technological novelty and consortium quality, while avoiding the detailed WP/task descriptions required only at FPP stage.

2. Before preparing the PO

2.1 Use the current SMART documents

Always work from the latest documents published for the relevant call. The core PO submission package consists of the three mandatory items listed below. The project data completed in the Cluster Projects Tool must be fully consistent with all uploaded files.

- PO Template — complete the current SMART PO Template and submit the final version as a PDF.
- PO Cost Template — complete the current Excel workbook and submit it as a separate Excel file; the financial summary table must also be pasted into Section 5 of the PO Template.
- Letter of Intent (LoI) — submit one LoI for each participant, completed in accordance with the instructions in the current LoI template and signed by an authorised representative (electronic signature preferred). The signed LoIs are uploaded through the Cluster Projects Tool; no postal submission is required.
- SMART documents and templates: <https://www.smarteureka.com/submit-your-proposal/documents-and-templates/>
- Eligibility and selection criteria: <https://www.smarteureka.com/submit-your-proposal/eligibility-and-selection-criteria/>
- Funding and countries: <https://www.smarteureka.com/submit-your-proposal/funding-and-countries/>
- Cluster Projects Tool: <https://cluster-projects.eurestools.eu>

2.2 Eligibility and national funding checks

- The consortium must include at least two industrial companies from two different countries participating in the call.
- The project must have a civil purpose, be innovative and market-oriented, and fall within advanced manufacturing.
- SMART applies the following consortium-balance rule: participants from one country should not jointly account for 70% or more of the total project budget. Some countries may apply more restrictive national limits or consortium-balance rules; participants must therefore check the applicable national conditions with the relevant National Funding Authority (NFA).
- Each participating country should confirm the applicable national eligibility and funding route with its NFA before submission. Where a participant intends to self-fund, that participation route should also be confirmed where relevant.

- Partner names, countries, budgets, effort, starting date and duration must be identical in the PO narrative, the PO Cost Template and the Cluster Projects Tool.

2.3 Units and terminology

Use the same units everywhere

- Express all budget figures in k€.
- Express all human-resource figures in person-years (PY).
- Use the conversion 1 person-year (PY) = 12 person-months (PM).
- Use project months as M1, M2, M3, etc. when describing relative timing.

2.4 Use of generative AI tools

- Generative AI tools may be used to support proposal preparation, provided that applicants remain fully responsible for the accuracy, integrity and quality of the submitted content.
- Any **substantial use** of generative AI should be transparently disclosed; basic editorial support (e.g. language or style improvements) is not considered substantial use.
- Applicants should verify all AI-generated content and references and ensure that confidential, personal or intellectual-property-protected information is handled appropriately.

3. Submission package and process

1. Create or use the consortium project record in the Cluster Projects Tool and complete the required online data.
2. Prepare the PO narrative using the current SMART PO Template and export the final version to PDF.
3. Complete the separate PO Cost Template in Excel. Preserve the existing formula logic; if additional partner rows, years or other structural extensions are needed, adapt the workbook consistently and verify that all totals remain correct. Paste the completed financial summary table into Section 5 of the PO Template.
4. Prepare one Letter of Intent (LoI) for each participant. Follow the instructions in the current LoI template, complete the requested organisation and project information, and obtain the signature of an authorised representative; electronic signature is preferred.
5. Upload the PO PDF, the PO Cost Template in Excel and the signed LoI for every participant to the Cluster Projects Tool before the deadline stated in the current call calendar. No postal submission is required. Perform a final cross-check of partner, budget, effort and timing data before submission.
6. If the maximum number of documents that can be uploaded to the Cluster Projects Tool is reached, a practical option is to group supporting documents, such as individual LoIs, in a clearly named ZIP file, keep the individual files inside the archive clearly identifiable.

Submission consistency

The online form, narrative PDF, cost workbook and Letters of Intent must describe the same project and participants. Any difference in partner names, countries, total cost, PY, start date or duration can create eligibility or evaluation problems.

4. How the PO is evaluated

The current SMART PO evaluation form contains scored main sections and supporting non-scored fields. Evaluators use the proposal evidence to assign one score to each scored main section and provide qualitative conclusions and recommendations.

Evaluation area	What is assessed	Status
Project overview	Project data displayed in the platform.	Not scored
Relevance to the SMART programme	Fit with SMART scope and objectives.	Scored
Rationale of the project	One-page description; problem statement and market value chain; project innovations and technology value chain/solutions.	Scored
Market and societal targeted impact	Expected impact and exploitation opportunities; market analysis; consortium and partner market access; UN SDGs.	Scored
Technology	Technological innovation and novelty in relation to the state of the art; state-of-the-art analysis.	Scored
Consortium overview	Roles and contributions; partner profiles; business and technology cooperation added value.	Scored
Writing quality	Readability; focus and conciseness.	Scored
Conclusions / recommendations	Overall strengths and weaknesses; recommended improvements.	Not scored

4.1 Rating scale

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

4.2 What this means for proposers

- Do not rely on a single section to demonstrate SMART relevance. The fit with advanced manufacturing, selected application sectors and research and innovation domains should be visible throughout the proposal.

- A strong score requires evidence, not only assertions. Quantify market, impact and technical claims wherever credible data are available.
- Recommendations from the PO evaluation should be addressed in the FPP stage.
- Writing quality is assessed across the whole document. Concision, structure, readable tables and useful diagrams therefore affect the evaluation.

5. Preparing the PO narrative

5.1 Project identification and key information

Complete the identification table exactly as requested in the PO Template: proposal full name, acronym, coordinator, planned starting date, duration, total PY, total eligible cost and the project abstract. The consortium list must use the same legal or agreed short names and countries as the cost workbook and online form.

Select the relevant SMART application sectors and research and innovation domains from the SMART Technology Roadmap. The selected sectors and domains must be coherent with the actual project scope and should be supported by the narrative, particularly the one-page description and the Technology section.

5.2 Section 1 - Rationale of the project

1.1 One-page description

- Provide a self-contained overview that can be understood without consulting the rest of the proposal.
- Cover the problem and market context, proposed innovations and solution, expected impact and exploitation opportunities, technological novelty and strategic relevance, consortium and high-level implementation logic.
- Use concrete language and keep technical detail to the minimum needed to make the concept credible.

1.2 Problem statement and market value chain

- Describe the problem or unmet need, current limitations and bottlenecks, and the users, customers or stakeholders affected.
- Map the relevant market value chain, including the main actors, processes, interfaces and dependencies.
- Show where the problem occurs, why it is important now and where the consortium is positioned. Do not turn this section into a detailed solution description.

1.3 Project innovations and technology value chain/solutions

- Explain the core project idea, principal innovations and objectives and link them directly to the problem and market need.
- Describe the technology value chain or solution architecture: functions, modules, building blocks, flows, interfaces and dependencies.
- Indicate the starting point, intended maturity and expected project results. Keep the detailed state-of-the-art comparison for Section 3.

5.3 Section 2 - Market and societal targeted impact

2.1 Expected impact and exploitation opportunities

Describe industrial, economic, market, societal and environmental effects; identify beneficiaries; link impacts to innovations/results; quantify expected change; explain exploitation routes, responsibilities and timing, including IP, standardisation or knowledge transfer where relevant.

2.2 Market analysis

Focus on the actual target markets and segments. Use current evidence on market size, growth, geography, customers, competitors, alternatives, barriers and threats. Explain future evolution and competitive differentiation, and identify sources and dates for quantitative data.

2.3 Consortium market access

Explain combined access to markets, customers, end users, validation environments and value-chain actors. Describe the joint route to exploitation and why the consortium is credible as a whole.

2.4 Partner market access

For every partner, link project results to target markets/users, current access channels, exploitation route and timing. For universities and research organisations, explain knowledge transfer, licensing, training, standardisation or other routes to impact.

2.5 Contribution to SDGs

Select only materially relevant UN SDGs and targets. Explain the causal link between project activities/results and the contribution, and quantify it with baselines or indicators wherever possible.

5.4 Section 3 - Technology

3.1 Summary of technological innovation and novelty in relation to the SoTA and strategic relevance

- Summarise the principal technological advances and compare them directly with the relevant state of the art.
- State what is genuinely novel, the technical challenge or breakthrough and how the proposal differs from existing products, prototypes, research results and related initiatives.
- Explain strategic relevance for advanced manufacturing, the selected SMART application sectors and research and innovation domains, and relevant European or international value chains.

3.2 State-of-the-art (SoTA) analysis

- Describe the current industrial and academic baseline, including products, prototypes, research, standards and trends where relevant.
- Use current sources and explain how related EUREKA, EU and other projects, including partners previous or ongoing work, relate to the proposal.
- Identify the limitations, gaps and unresolved technical challenges that the project will address. Avoid repeating the market analysis.

5.5 Section 4 - Consortium overview

4.1 Consortium roles and contributions

Use the matrix in the PO Template to show, for each partner, country/type, main role, key activities or responsibility, specific contribution/assets, expected results/exploitation role and key interfaces. The narrative should explain complementarity, balance and dependencies between partners and countries.

Use the following codes in the consortium matrix:

- Type: I = Industry / Large Company; S = SME (Small and Medium-sized Enterprise); U = University; R = Research Institute.
- Main role: C = Coordinator; P = Partner; SC = Subcontractor.

4.2 Partner descriptions/profiles

Provide a concise, project-specific profile for each partner. Focus on relevant business or mission, expertise, infrastructure, track record, key personnel, proposed role and capacity to exploit, transfer or use the results. Avoid generic corporate descriptions.

4.3 Cooperation added value: business level

Explain what the partners can achieve together that they could not achieve independently, including value-chain completeness, end-user/customer involvement, business benefits and international added value. Identify business gaps or overlaps and how they will be managed.

4.4 Cooperation added value: technology level

Explain technological complementarity, unique capabilities, integration and knowledge exchange. Demonstrate why international cooperation is needed and identify technical gaps, redundancies or critical dependencies and how they are addressed.

5.6 Section 5 - Cost information table

Complete the separate PO Cost Template with the estimated cost and personnel effort per year and per partner. In Section 5 of the PO Template, replace the example with an image or screenshot of the completed financial summary table so evaluators can see the same figures in the narrative proposal.

Use the Excel template as the source of the figures; do not manually recreate or alter calculated values. Costs must be expressed in k€ and effort in person-years (PY), using 1 PY = 12 PM. The pasted table, the Excel workbook and the Cluster Projects Tool must contain identical partner, effort and cost information.

5.7 Section 6 - Rationale for SMART procedure and public funding

Explain the rationale for using the SMART procedure and for public funding, covering the following points where relevant:

- National gain: benefits for the participating countries, contribution to national strategies, competitiveness, standardisation, knowledge dissemination, productivity, wellbeing or other relevant national effects, and the benefit of international collaboration.
- Return on investment (RoI): how the investment by companies and Public Authorities is expected to generate value, revenues, jobs, productivity, industrial activity or economic growth.
- Value creation of the national sub-consortium: how cooperation and cross-fertilisation between national participants create additional value.
- Balance of the national participation: explain the contribution and effort balance between companies, SMEs, research organisations and other participants where relevant.
- NFA contact: confirm that project partners have contacted the relevant National Funding Authorities to check national eligibility and funding conditions.

6. Completing the PO Cost Template

The PO Cost Template is a separate Excel workbook and must remain consistent with the narrative and online form. Use the light-green editable cells and do not overwrite formulas.

Area	Current workbook structure
Time	Year 1, Year 2, Year 3 and Total.
Effort	Person-years (PY) for each partner and year; total PY calculated automatically.
Costs	Labour cost, material cost and subcontracting cost in k€; annual and total costs calculated automatically.
Partners	The current workbook contains seven partner rows.
Consistency	Partner order/names, PY and costs must match the PO narrative and Cluster Projects Tool.

If the workbook structure is insufficient

The template may be extended when needed. Add partner rows, years or other structural elements using the existing formatting and formula logic as the pattern, and verify that all totals remain correct and consistent with the PO narrative and Cluster Projects Tool.

7. Final quality and consistency checklist

- Use the latest PO Template, PO Cost Template and Letter of Intent template for the call.
- Replace all angle-bracket and square-bracket placeholders and remove the green guidance boxes before final submission.
- Confirm that all partner names, countries, total budget, PY, start date and duration match across the PDF, Excel and online form.
- Check eligibility and national funding conditions with the relevant NFAs.
- Confirm that participants from one country do not jointly account for 70% or more of the total project budget, and check whether any participating country applies a more restrictive national limit or balance rule.
- Use k€ and PY consistently; 1 PY = 12 PM.
- Ensure SMART relevance and advanced-manufacturing scope are explicit and that the selected sectors and research and innovation domains are consistent with the SMART Technology Roadmap and supported by the proposal narrative.
- Use recent, identified sources for market and state-of-the-art claims.
- Make expected impacts and technical advances measurable wherever possible.
- Use figures, diagrams and tables when they improve understanding, but keep the proposal focused and concise.
- Confirm that one signed Letter of Intent has been prepared for every participant in accordance with the LoI template instructions and uploaded to the Cluster Projects Tool; electronic signature is preferred and no postal submission is required.
- Where generative AI has been used substantially in proposal preparation, ensure that its use is transparently disclosed and that all AI-generated content and references have been verified.
- Perform a final writing-quality review for clarity, coherence, conciseness and internal consistency.

8. After submission

The SMART Office performs the initial checks and the proposal is reviewed within the SMART evaluation and decision process, together with the relevant Public Authorities / NFAs. The evaluation identifies strengths, weaknesses and recommended improvements. The final PO decision determines whether the consortium is invited to prepare an FPP.

If invited, use the PO evaluation feedback as an explicit input to the FPP preparation. Material changes in consortium, budget, effort or scope should be justified and checked with the SMART Office and relevant NFAs.

9. Contact and references

SMART Office: info@smarteureka.com | www.smarteureka.com

Current call documents: <https://www.smarteureka.com/submit-your-proposal/documents-and-templates/>

Funding and NFA information: <https://www.smarteureka.com/submit-your-proposal/funding-and-countries/>

Cluster Projects Tool: <https://cluster-projects.eurestools.eu>