Horizon Europe Pillar II Quick Guide

Overview

Horizon Europe (HE) is the EU's and the world's largest research and innovation collaboration program with a budget of $140 billion (€95.5 billion, from 2021 to 2027). Key objectives of the funding program aim to tackle global challenges, achieve the UN's Sustainable Development Goals, and facilitate global collaboration across these priority research areas. As an associated country, Canada is eligible to apply to Pillar II project calls (agreement was signed on July 3, 2024). Pillar II projects are based on global challenges where a group of chosen partners (consortium) of Europeans, associated countries and others, work together to co-innovate on projects. Canadians look to HE to expand their capabilities, build on an innovation that can take two to six years to develop, and connect with potential future partners, clients and markets.

> *Association* *means Canadians can participate under equivalent conditions as legal entities from the EU Member States and receive grants directly from the European Commission.*

All types of cross-sector Canadian organizations are eligible to apply. A consortium can include academic researchers (colleges, universities, institutes), government organizations, businesses (any size), and associations. There is no mandatory checklist for types of partners. Europeans actively seek out Canadians to collaborate with as we are recognized as trusted international partners.

Navigating Horizon Europe and Pillar II

Horizon Europe research funding will look slightly different for Canadian researchers compared to Canadian funding programs, in terms of scope and objectives, team composition, application procedures, budgeting, and reporting requirements. HE funding operates on a reimbursement model and requires continuous adherence to EU protocols, and technical and financial reporting requirements. Detailed documentation of expenses and researcher time (timesheets) is critical to ensure the continued access to funds.

> *Important requirements*
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> - *All expenses must be eligible and documented for reimbursement*
> - *Regular technical and financial reporting is mandatory*
> - *Audits are possible, and researchers must prepare accordingly*
> - *Detailed timesheets and activity records must be maintained*
> - *Institutional budget review is required before participating on HE consortium application*

Assess Readiness to Apply

Western researchers who are considering participating in a HE consortium should conduct a readiness assessment to ensure they have the knowledge, experience, and human resources in place during the life cycle of the project. Since the administrative tasks can be time-consuming, it is critical that you have resources for managing the financial aspects of the project and carrying out the required administrative tasks, documentation and reporting over the lifetime of the grant (post-award). The Office of Research Services must review application drafts (Part A, proposal sections, and budgets) at least 3 weeks prior to the deadline, to provide critical feedback and to ensure that all expenses are eligible.

> ### *Partner First*
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> *Western University researchers should start their Horizon Europe funding journey as **partners** (vs. leading projects, as coordinators) to gain experience with complex and time-intensive administrative requirements. Note that partners are referred to as "participants" in the application. Researchers must factor in working with consortium partners in different time zones.*

Pillar II Overview and Program Structure

Horizon Europe's Pillar II is focused on global challenges and European industrial competitiveness. Pillar II has a budget of €53.5 billion for the 2021-2027 period and aims to address major societal challenges and enhance the EU's industrial competitiveness through collaborative research and innovation. Canadian organizations (universities, research institutes, not-for-profits, SMEs, and industries) are fully eligible to participate and receive funding for Pillar II projects. Any previous requirements for matching financial contributions from Canadian participants has been eliminated. Pillar II applications respond to calls for proposals for various topics under six funding clusters:

- Health

- Culture, Creativity & Inclusive Society

- Civil Security for Society

- Digital, Industry and Space

- Climate, Energy and Mobility

- Food, Bioeconomy, Natural Resources, Agriculture & Environment

The European Commission publishes calls for proposals based on the Horizon Europe work programmes and each cluster has its own work programme. Pillar II programs are collaborative projects with topics identified as important to the European Commission. Each cluster is composed of key *Destinations*. Destinations are based on the EU's policy priorities and the desired impact of the EU funding. Each destination is composed of research topics. These are then open to calls for 1) Research and Innovation Actions (RIAs); 2) Innovation Actions (IAs); or 3) Coordination and Support Actions (CSAs).

Horizon Europe work programmes are typically released on an annual basis but are structured around a two-year cycle. The main work programme is usually released in the first year, outlining calls for proposals for the following two years. However, the European Commission also pre-publishes draft work programmes to allow for stakeholder feedback and transparency. Once draft work programmes have been circulated, this is an opportune time to for international partners to network and form project consortia as they identify suitable funding opportunities (e.g., topics). Pillar II projects focus on research that is at Technology Readiness Levels of 2-8 (not high-risk projects), carried out through RIAs or Innovation Actions (IAs.

Research and Innovation Actions (RIAs)	Innovation Actions (IAs)
• Research and Innovation Actions (RIAs) are funding instruments that primarily support projects aimed at generating new knowledge, exploring the feasibility of new or improved technologies, or developing the foundations of future technologies, products, processes, or services. • RIAs focus on fundamental or applied research; technology development and integration; testing and validation of small-scale prototypes in a laboratory or simulated environment. • Expected outcomes: Advancement of scientific knowledge; Scientific publications, data sets, methods, or early-stage technological results; Contribution to the policy objectives of the Horizon Europe programme • Funding rate: 100% of eligible costs for all participants; indirect costs are reimbursed at a flat rate of 25% of the eligible direct costs. • Typical consortium consists of international, multidisciplinary teams; for Pillar II calls, you must apply as a team of at least 3 partner organisations from 3 different EU or associated countries. At least one of the 3 partners must be from an EU country.	• Innovation Actions (IAs) are HE funding instruments that support projects close to the market—focusing on activities that turn research and technological ideas into practical solutions, such as prototypes, piloting, product validation, or market uptake. • IAs focus on prototyping, testing, demonstrating; large-scale product validation; market replication and innovation deployment; preparing innovations for commercialization. IAs are crucial for bridging the gap between lab research and real-world application, helping to drive European innovation to market. • Funding Rate: 70% of eligible costs for most participants; 100% for non-profit legal entities; indirect costs are typically reimbursed at a flat rate of 25% of the eligible direct costs. • Typical Consortium: Must apply as a team of at least 3 partner organisations from 3 different EU or associated countries. At least one of the 3 partners must be from an EU country; Often includes a mix of research institutions, industry (especially SMEs), and end users or public authorities.

Pillar II calls have an average success rate of 15% (calls in certain clusters have higher or lower success rates). Pillar II projects rely on strong international collaborations to be successful, and consortia are on average, composed of 8-12 international partners and in some cases even more.

Application Steps as a Partner (Western specific process)

As a partner, you will take on a specific part of the project, known as tasks, or work packages. The following steps will take you through the process *as a partner*:
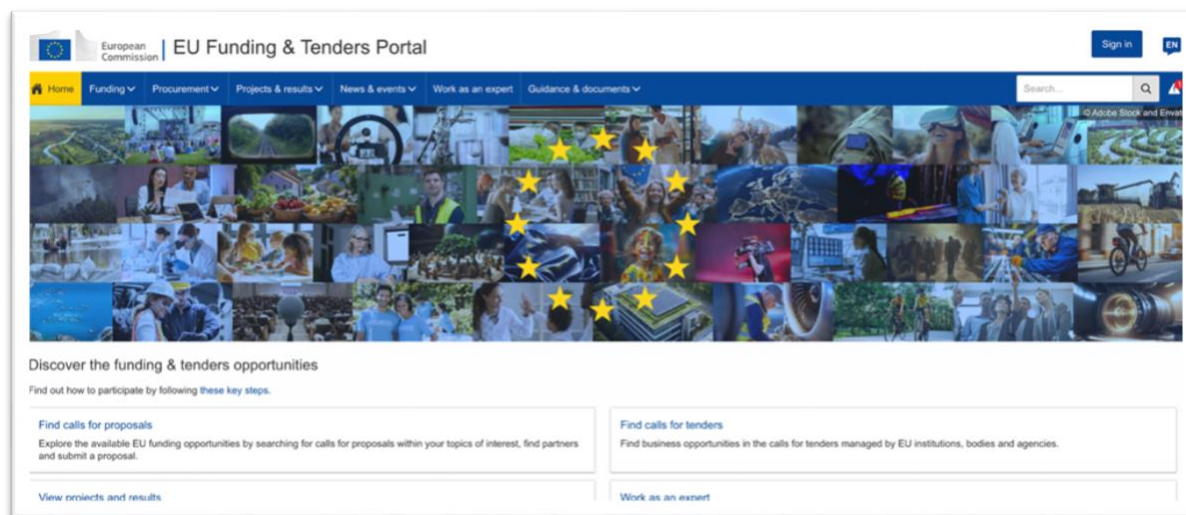
1. A suitable call is identified, and Western is invited to participate in a proposal by the consortium lead. The consortium lead is called a **coordinator** who is responsible for developing the consortium and managing the proposal submission process.
2. Once you have been invited to participate on a proposal, notify the Office of Research Services, Institutional Research Programs officer. Ideally you should notify ORS-IRP at least one month in advance.
3. The Pillar II consortium may already be established, or it will be built over the development period.
4. Each participating country (partner) creates their own EU profile on the EU Funding and Tenders portal to complete the required application forms.
5. Proposal and budget development phase; as a partner, you will be required to complete Part A of the proposal and develop a budget for your work packages.

6. **Review:** Submit your application (Part A) and budget for review to ORS at least two weeks before the EU coordinator's internal deadline.
7. **Submit** a ROLA proposal for approval at least one week prior to the EU funding deadline.

EU Funding and Tenders Portal

Setup your EU Profile

Prior to participating on any Pillar II application, you will need to create your own EU Funding and Tenders portal login. When you create your EU F&T account, you may add Western's PIC (participant number) **988059752** to link our institution to your profile.

Application Forms in the EU Funding & Tenders Portal

Part A of the standard RIA/IA application collects administrative, legal, and financial information about the proposal and the participating organizations. It is structured, automatically generated from data entered into the portal, and submitted electronically. As a participant on the application, you will complete your participant affiliation and organizational data in this form. You will be required to complete a budget for your proposed research activities and personnel. Typical costs include personnel, subcontracting, travel, and equipment. Indirect costs are automatically calculated at 25%. Ethics and security declarations must also be completed by the entire consortium.

> *Budget Tips*
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> - *Include dedicated administrative support in your budget*
> - ***If you are requesting €430,000 or more**, make sure to include **audit costs** in your budget. All HE projects where a single participant receives €430,000 or more, require a **Certificate on the Financial Statements** prepared by an independent auditor. Audit costs are an eligible expense for Horizon Europe grants and we recommend including a minimum of CAD 20,000 in audit expenses under D. other direct costs.*
> - *Ensure consortium gender balance (for a stronger application)*
> - *Plan for open data sharing (for non-sensitive calls)*

> ***Gender Equality Plan***
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> *Western satisfies the EU requirements for a Gender Equality Plan through our institutional policies, practices and procedures. You may select "Yes" to the question in Part A, "Does the organization have a Gender Equality Plan (GEP) covering the elements listed below?"*

Part B—Technical Description

Part B is the core of the proposal, where applicants describe the project idea in detail—its scientific, technical, societal, and operational dimensions. It's evaluated by external experts and scored against three main evaluation criteria: excellence, impact, and quality and efficiency of the implementation.

Evaluation Process for RIAs & IAs

The evaluation process first involves and eligibility check, ensuring there are at a minimum 3 partners from 3 different EU/Associated Countries. Independent experts assess the proposal using three criteria: Excellence (scientific/technical quality and innovation); Impact (expected benefits, uptake, and exploitation; this is especially key for IAs); and Implementation (feasibility, resources, and consortium strength). Each section is scored 0–5; a minimum of 10/15 overall and 3/5 per section is required for funding; proposals are ranked and if successful, teams work with the European Commission or an agency to finalize the grant agreement. Evaluation results are available within 5 months of deadline, and a grant agreement is signed within 8 months.
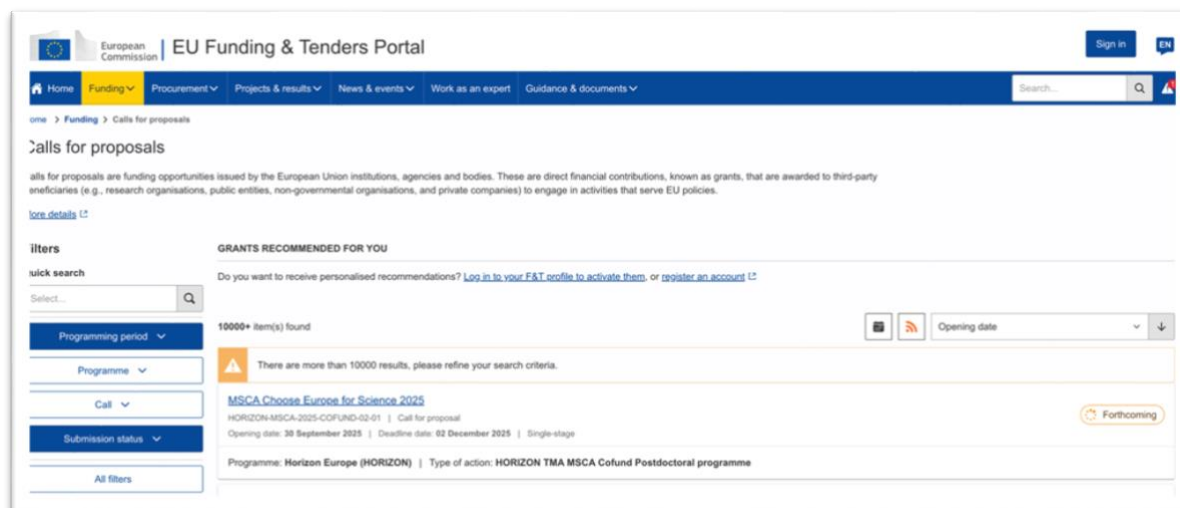
Finding Calls and Topics

All open, forthcoming and closed funding calls are located in the [EU Funding and Tenders portal](#). An ORS officer can assist you with navigating the EU funding opportunities and locating suitable calls and topics.

1. Go to the EU Funding & Tenders Portal

From the homepage, Go to **Funding** at the top menu, then select **Calls for Proposals**.

Discover the funding & tenders opportunities

2. Use Search Filters

Filter and refine your search on the left-hand search box using:

- Programming Period > 2021-2027
- Programme > Horizon Europe
- Call > Scroll through calls by Cluster (e.g., CL2)
- Submission status > Choose "Open and Forthcoming", uncheck "Closed" to refine results

3. Browse the List of Calls

For each call listed, you can view the title and topic ID (*e.g., HORIZON-CL6-2025-BIODIV-01-01*); type of action (RIA, IA, etc.); deadline, and budget.

Clicking a call title opens the full call page, which includes the summary and objectives; scope and expected outcomes; eligibility and submission rules; and call documents (work programme, templates). From the call page you can also access the full work programme (e.g., CL2, Culture, Creativity and Inclusive Society); topic-specific guidance; proposal templates (Part A and Part B); evaluation criteria, and FAQs.

Find Project Partners and Build Networks

While Western encourages researchers to participate in HE projects as partners rather than coordinators, building international networks remains essential. Expanding your global connections is key to long-term success in HE consortia. Western's ORS encourages faculty to attend networking and brokerage events, where you can pitch your research and connect with potential collaborators. The EU regularly hosts Info Days focused on specific clusters or topics, offering valuable opportunities to engage.

> ***Get Your Research Pitch Ready***
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> *Elevate your networking experience by creating a short summary of your research in 1 or 2 slides—also known as a "pitch." Brokerage and networking events will allow researchers a short amount of time (5 min) to pitch their research to the audience in a couple of slides. See:* How to Pitch Your Research

Seed funding to support building HE networks, and proposal development can be a valuable way to jump start to your funding plans. SSHRC's Destination Horizon grants, for example, help build HE networks and proposals. Additional seed opportunities will be forthcoming.

Resources

Western Research Horizon Europe Program Page and Horizon Toolbox [Western login required]

Government of Canada sites:

Horizon Europe—ISED

National Contact Points

EU sites:

EU Funding and Tenders Portal

Horizon Europe (main EU site)

Horizon Europe—Who Should Apply

Horizon Europe Program Guide

CORDIS Project Database

Horizon Europe Country Profiles

Horizon Europe National Contact Points Portal

Horizon Europe Info Days

Gender Equality in Research and Innovation