Horizon Europe in Canada: Sharing Experience, Building Institutional Capacity, and Developing a Community of Practice

Workshop Session at CARA National Conference,
May 10, 2026



Contents

Report Information 2
Executive Summary 3
Introduction 4
Workshop at a Glance 5
Methodology 6
List of Participating Institutions 7
Key Takeaways 7
Recommendations and Best Practices for Canadian Institutions 8
Workshop Overview 10
Outcomes and Impact 15
Annex: Lessons Learned and Best Practices from Institutions outside Canada 16
References and Resources 21

Report Information

Version: Version 1.1, September 2026

Prepared by: Brice Rousseau (University of Toronto) and Derya Buyuktanir Karacan (EURAXESS North America), on behalf of the workshop note-taking team, under the coordination of the CARA Horizon Europe Committee.

Note-taking team: Derya Buyuktanir Karacan (EURAXESS North America), Michele La Vie-Bier (Simon Fraser University), Mark Philippo (University of British Columbia), Clotilde Ribaut (University of Ottawa), Brice Rousseau (University of Toronto).

Acknowledgements: The CARA Horizon Europe Committee gratefully acknowledges EURAXESS North America, the session's presenters and discussion leads, the note-taking team listed above, and the representatives of the 23 participating Canadian institutions who contributed their time, experience and candor to this session. Their input, along with the written contributions from the University of Otago, CNRS, the German Horizon Europe working group, the University of Munich and EURAXESS North America included in the Annex, made this report possible. The CARA Horizon Europe Committee would also like to thank the CARA National Conference Program Committee and Alison Prescott, Manager, Programs and Services at CARA for their invaluable support in the organization of this session.

Intended audience: This report is intended primarily for research administrators and pre- and post-award staff, and for international office and research office leadership, at Canadian universities, hospitals and research institutions engaged in, or considering, participation in Horizon Europe. It may also be of interest to institutional decision-makers, national funding bodies, and other CARA members with an interest in international research funding.

Suggested citation: CARA Horizon Europe Committee (2026). Horizon Europe in Canada: Sharing Experience, Building Institutional Capacity, and Developing a Community of Practice. Canadian Association of Research Administrators (CARA).

Executive Summary

This report summarizes a 3-hour workshop session held on May 10, 2026, at the CARA National Conference in Richmond, British Columbia, convened to gather the experience accumulated by Canadian institutions since Canada's association to Horizon Europe in 2024 and to identify priorities for future institutional and national action. Representatives of 23 Canadian institutions and EURAXESS North America took part, with additional written contributions from peer institutions in New Zealand, France, Germany and the United States included in the Annex.

Key messages:

- Institutional coordination remains a central challenge: most institutions lack a dedicated Horizon Europe role, and defining clear ownership across research, finance and legal units is still a work in progress, although a critical step for capacity building.
- Existing researcher networks are the primary driver of successful partnerships; institutions with limited European connections face a steeper path into consortia.
- A stronger, more coordinated national Community of Practice (focused especially on post-award budgeting and finance) is seen as both urgent and achievable, with CARA well placed to support and scale it.

Major recommendation themes:

- Internal structures, governance and capacity building (e.g., a designated internal contact point and a dedicated Horizon Europe working group).
- Opportunity identification and consortium development (e.g., long-term partnership building and early, centralized monitoring of work programmes).
- Proposal development and budget preparation (e.g., early involvement of legal and finance staff, and robust budgeting templates).
- Project start-up, implementation, monitoring and reporting (e.g., structured pre-/post-award handovers and proactive deadline tracking).

Future actions: participants confirmed CARA's role in building and scaling a national Horizon Europe Community of Practice, with particular emphasis on post-award budgeting and finance. With Horizon Europe approaching its end and the next European Framework Programme expected in 2028, the Committee intends for this report to evolve as institutional experience grows (see Outcomes and Impact, page 15).

Introduction

Since Canada's association to Horizon Europe in 2024, research institutions across the country have been navigating the opportunities and complexities of participating in one of the world's largest research and innovation funding programmes. A session was organized at the CARA National Conference in Richmond, BC on May 10, 2026, to gather and exchange the experience accumulated to date and to reflect collectively on future actions.

Representatives from 23 Canadian institutions and EURAXESS North America shared strategic perspectives, lessons learned from proposal development, consortium building, and grant management. The participants' expertise covered the whole project life cycle, from partnerships and proposal development to contract and grant management. They identified common barriers and challenges encountered in engaging with Horizon Europe and good practices that can support and strengthen future participation. Advice from institutions in Europe and New Zealand provided insightful contributions to those discussions.

The session was also an important milestone in building a community of practice to serve as a platform for sharing expertise, developing support specific to Canadian institutions, and coordinating engagement with other stakeholders.

This document summarizes the fruitful and dynamic discussions that took place during this 3-hour workshop. It is intended to evolve with the experience of research administrators at Canadian institutions and offer perspectives on capacity building, both at institutional and national levels. With Horizon Europe coming soon to an end and the next European Framework Program starting in 2028, we hope that those insights will help research administrators prepare early for optimizing Canada's participation in future funding opportunities.

Questions, comments and additional contributions can be directed to the Co-Chairs of the CARA Horizon Europe Committee, Brice Rousseau (brice.rousseau@utoronto.ca) and Karen Samis (karen.samis@queensu.ca).

Workshop at a Glance

Date	May 10, 2026
Venue / Conference	CARA National Conference, Richmond, British Columbia
Duration	1pm – 4pm
Organizers	Derya Buyuktanir Karacan, Mark Philippo, Alison Prescott, Clotilde Ribaut, Brice Rousseau
Session format	Three thematic parts combining discussion among Canadian institutions with written contributions from international peer institutions (see Methodology, below)
Note takers	Derya Buyuktanir Karacan, Michele La Vie-Bier, Mark Philippo, Clotilde Ribaut, Brice Rousseau
Institutions represented	23 Canadian institutions, plus EURAXESS North America; international contributions from New Zealand, France, Germany and the United States (Annex)
Number of individual participants	~ 50; institutional representation is listed in the following section



Methodology

This report is based on facilitated discussion during the May 10, 2026, workshop session, captured in real time by a team of five note takers representing EURAXESS North America and four Canadian institutions (see Report Information, page 2). Discussion was organized around three thematic parts: strategic considerations and internal structures; best practices in pre- and post-award administration; and knowledge exchange and Community of Practice. Those were complemented by lessons learned from peer institutions outside Canada provided in advance to the organizers and shared with the audience: a video from New Zealand and written contributions from France, Germany and the United States (all summarized in the annex).

Notes from the session were subsequently compiled and cross-checked among the note-taking team, then synthesized into the Key Takeaways and Recommendations presented in this report. The recommendations reflect recurring themes and areas of convergence identified across institutional experiences, rather than the position of any single institution; where perspectives diverged among participants (for example, on the effectiveness of matchmaking platforms) this is noted in the relevant section. This report has not undergone formal external review beyond the CARA Horizon Europe Committee and is intended as a working reference document, to be updated as institutional experience with Horizon Europe accumulates.

Workshop agenda:

1:00 - 1:10 pm	**Introduction & Icebreaker**
1:10 – 2:00 pm	**Part 1 – Focus on strategic aspects** • Presentation: Institutional support for Horizon Europe – From awareness to adoption (Brice Rousseau) • Presentation: Leveraging Pillar I to build strong Pillar II consortia (Derya B. Karacan) • Discussion in small groups
2:00 - 2:10 pm	**Break**
2:10 - 3:40 pm	**Part 2 – Focus on exchange on best practices in pre- and post-award** • Pre-award: introduction of topics (Clotilde Ribaut) and small groups discussion • Break • Post-award: introduction of topics (Mark Philippo) and small groups discussion
3:40 – 4:00 pm	**Part 3 – Next steps for the Community of Practice**

List of Participating Institutions

Brock University
Concordia University
McGill University
McMaster University
Polytechnique Montreal
Queens University
SickKids Hospital
Simon Fraser University
Université Laval
Université de Montreal
University Health Network
University of Alberta
University of British Columbia
University of Calgary
University of Guelph
University of Lethbridge
University of Manitoba
University of Ottawa
University of Saskatchewan
University of Toronto
University of Victoria
Western University
Yukon University
EURAXESS North America and George Washington University

Key Takeaways

- **Institutional coordination remains a central challenge, despite the presence of multiple relevant units.** Defining clear ownership of Horizon Europe responsibilities, establishing a recognized internal contact point, and ensuring finance and legal colleagues are engaged from the outset remain works in progress across institutions. The complexity is compounded by the fact that Horizon Europe typically represents an additional responsibility for staff rather than a dedicated role, and that existing expertise built around Tri-Agency or CFI frameworks does not readily transfer to Horizon Europe requirements.
- **Existing networks are the primary driver of successful partnerships.** Early adopters with established European networks require comparatively little institutional support, while researchers without such connections face a much steeper path. This points to the importance of investing early in relationship-building, supporting researcher mobility and networking, and leveraging programs such as NFRF-International and Mitacs as stepping stones toward Horizon Europe engagement.
- **Canada's unique structures require a stronger, more coordinated Community of Practice.** Building shared knowledge, particularly around post-award processes, budgeting, and finance, is seen as both urgent and achievable. CARA is well placed to support and scale this effort nationally. The CARA Horizon Europe Committee offers already mechanisms to exchange on Horizon Europe issues that could be further deployed. In addition, existing local initiatives offer opportunities to expand outreach.

Recommendations and Best Practices for Canadian Institutions

The numerous discussions during the round table highlighted some feasible solutions resumed below.

Internal Structures, Governance & Capacity Building

- Designate one internal point of contact (typically the research office or international office) responsible for centralizing Horizon Europe information and disseminating it appropriately across units.
- Build dedicated capacity for Horizon Europe (e.g., a project manager or financial officer, potentially funded through overhead recovery) rather than treating it as an add-on to existing roles.
- Create an internal Horizon Europe working group with representatives from research services, international partnerships, finance, legal, and audit to ensure regular information exchange between pre-award and post-award teams, and risk management.
- Develop institutional knowledge and capacity through templates, guidelines and training workshops for researchers and staff.
- Engage institutional leadership early to secure commitment on resource allocation, workload recognition, and long-term support.
- Connect with a community of practice (locally and through national platforms like CARA) to share expertise, especially on budgeting, finance, and post-award processes.

Opportunity Identification & Consortium Development

- Encourage and support long-term partnership development rather than call-by-call networking, leveraging existing institutional relationships, mobility programs, MSCA activities, Mitacs, NFRF-International and other collaboration mechanisms.
- Maintain a partner database and track outcomes of past collaborations (e.g., hosted MSCA fellows or international research projects outside Horizon Europe) to convert them into future consortium entry points.
- Offer seed funding or travel/networking support especially for researchers with strong potential but limited European connections, either through internal mechanisms or by identifying and promoting external funding opportunities (SSHRC, MITACS).
- Centrally monitor Horizon Europe work programmes (including early drafts) and proactively identify opportunities aligned with institutional strengths before researchers begin proposal development.
- Provide an early strategic review of potential applications by assessing eligibility, competitiveness and alignment with call objectives before significant effort is invested.
- Help researchers interpret the policy and impact expectations behind a call, so proposals directly address the evaluation criteria and are framed through an EU rather than national lens.

- Encourage researchers to enter consortia with defined leadership responsibilities, such as leading a work package, to strengthen institutional visibility and future coordination opportunities.

Proposal Development & Budget Preparation

- Start consortium planning early and confirm partner capacity, commitment and compliance requirements well before submission deadlines.
- Involve legal and finance staff early in proposal development to address GDPR, research security, ethics and contractual requirements before submission.
- Develop robust budgeting tools and templates that incorporate person-month calculations, benefits, inflation, exchange rates and audit costs where applicable.
- Carefully justify personnel costs and budget assumptions, particularly for graduate students and highly qualified personnel whose salaries may differ from European norms.
- Treat early applications as learning opportunities and systematically analyze evaluator feedback to improve future proposals and institutional practices.

Project Start-up, Implementation, Monitoring & Reporting

- Hold an internal handover meeting between pre-award and post-award teams to transfer all project-specific information.
- Organize a kick-off meeting with the PI, their administrative team, and central administration to clarify requirements, roles, and processes.
- Provide regular training for project teams on grant management, including eligible costs, documentation requirements, reporting obligations and internal processes.
- Proactively reach out to PIs on higher-budget or higher-risk projects ahead of financial reporting deadlines to catch problems early.
- Implement proactive monitoring, including deadline tracking, internal reporting, documentation reviews and regular checks, even for lump-sum grants.
- Plan ahead and maintain records for audit requirements on cost-based projects with budget above €430,000.

Workshop Overview

Part 1: *Strategic considerations and internal structures*

Many institutions already have multiple units engaged in international activities (e.g. pre-award, post-award, international partnerships, research collaborations, student mobility), though these units often operate in parallel rather than in a coordinated manner. The unit responsible for Horizon Europe varies between institutions, although it is mostly the international office or the research office.

At Université de Montréal, a collaborative approach is in place between faculties and the international office. At Western University, the central research office serves as the intersection between research, internationalization and partnerships. At the University of Ottawa, Horizon Europe is managed by the international research office within the OVPRI. In some institutions, it falls under the post-award team (alongside US grants). At the University of Victoria, pre- and post-award teams are closely connected, while at Simon Fraser University, one Project Manager from Institutional Strategic Awards is dedicated to Horizon Europe, with a broader team drawn from SFU International, the Office of Research Services, and experts from Legal, Finance, and Research Accounting as needed.

There is broad consensus that Horizon Europe expertise is needed across the institution and all relevant portfolios (partnerships, contracts, finance). A key challenge is defining clear ownership — i.e., who is responsible for gathering and disseminating information to relevant units. Research services or the international office are generally seen as the natural internal and external contact point. International offices often maintain strong global relationships and may already be involved in proposal development, yet translating these connections into effective participation in Horizon Europe Pillar 2 remains difficult if knowledge of the program is limited.

Most institutions do not have a full-time person dedicated to Horizon Europe, which is challenging given the program's complexity. Building capacity to help researchers join consortia is also identified as a priority. While pre-award teams are generally familiar with Horizon Europe principles and challenges, post-award readiness requires strengthening. There is currently limited engagement from legal and finance departments, and a disconnect sometimes exists between the strategic ambition to encourage broad researcher participation and the actual readiness of finance departments to manage the associated funds.

The University of Calgary offers a notable example, having increased its dedicated capacity to five people working full time on Horizon Europe, enabling a higher volume of applications and stronger post-award project management.

The limited resources generally lead institutions to let researchers initiate collaborations based on their own networks and previous experience with Horizon Europe, and to focus their strategy on Pillar 2. However, the Marie Skłodowska-Curie Actions (MSCA) and the European

Research Council (ERC) are instruments that could be used to facilitate the development of strong European networks and facilitate success in Pillar 2 (although Canada is not associated to Pillar 1 of Horizon Europe). MSCA fellowships, staff exchanges, doctoral networks and postdoctoral fellowships create lasting cross-institutional ties that form the relational framework for future consortia. A Canadian university that hosts an MSCA fellow from a European institution, for example, is not simply supporting researcher mobility, it is establishing a natural entry point into future consortia led by that institution. ERC grants, meanwhile, confer the credibility and visibility that attract high-calibre partners and often position grantees as consortium leaders rather than peripheral participants. Institutions would take advantage considering these instruments as the first stage of a strategic partnership pipeline, one that moves from mobility to relationships, from relationships to trust, and from trust to consortium readiness. Research administrators are central to making this pipeline function. Institutions that systematically track MSCA fellows, document collaboration outcomes, maintain partner databases, and sustain relationships beyond funding cycles consistently outperform those that treat each project in isolation.

In that context, how is success in Horizon Europe currently assessed, beyond securing grants? It encompasses increased application volume, stronger partnership opportunities for principal investigators, and the development of richer institutional networks with greater resources to connect researchers across borders.

However, institutional support for faculty is seen as central; both in encouraging researchers to apply and in ensuring they do not engage independently without proper guidance. Capacity building and skills learning are essential to address the specific demands of Horizon Europe, compared to the national funding programs. Success in Horizon Europe requires indeed a shift in mindset, particularly regarding the top-down nature of Pillar 2 calls, alongside good understanding of the diverse funding schemes. Seed funding (either internal or external from MITACS and SSHRC) is useful to facilitate engagement. Staff exchange mechanisms with privileged EU partners are also seen as a valuable tool for building administrative expertise, especially given the demands of post-award processes such as audits.

A centralized Canadian resource addressing EU rules and regulations from a Canadian perspective is essential. Indeed, EU consortium leads and the National Contact Points in the EU may provide helpful advice based on their longer experience but lack familiarity with the Canadian context and the specific challenges of associated countries in general. Therefore, the support provided by Innovation, Science and Economic Development Canada (ISED) and the Canadian National Contact Points plays a significant role and further improvements are encouraged.

Finally, the question of consortium leadership also emerged as a meaningful marker of success, though a dilemma remains: while leading a consortium signals institutional strength, Canadian institutions currently tend to let European partners take the lead.

Part 2: *Best practices in pre- and post-award*

2.1 Consortium building and partnerships

Across institutions, existing networks remain the most reliable foundation for consortium building. Early adopters with strong European connections tend to require less institutional support and often serve as key entry points for broader engagement. Researchers generally take the initiative in identifying partners, with research offices providing follow-up support. Several institutions have developed structured approaches. Simon Fraser University focuses primarily on Pillar 2, offering internal funding for travel and networking to help researchers with interest and potential but without existing consortia. Queen's University holds information sessions to build expertise and facilitate connections. The University of Toronto leverages Mitacs and Destination Horizon grants, as well as support from the International Office as pathways leading into Horizon Europe applications. The University of Saskatchewan sends its international team to European research administration conferences to learn directly from European counterparts. If the International Office has enough knowledge of Horizon Europe, they are also able to identify gaps in consortia.

Matchmaking events and platforms are generally perceived as less effective for establishing meaningful collaborations, particularly when prior relationships are not in place. Researchers report feeling overwhelmed by the volume of such events. Platforms like Crowdhelix (a UK-based paid subscription service) have been explored but are found to require significant time investment and often feel like cold outreach. Trusted, pre-existing partnerships, such as those maintained by University of Ottawa with European partners, are seen as considerably more productive.

Taking on coordinating or leadership roles within consortia remains a challenge. Institutions point to the need for more experienced principal investigators, stronger institutional backing, and dedicated support structures. ERC grant success was broadly seen as a future enabler of stronger leadership positioning, though none of the participating institutions currently have sufficient post-award research administration capacity to support such grants, resources that will need to be built once projects are awarded.

Partnership development should begin early and be grounded in demonstrated collaboration history, ideally evidenced through previously co-funded programs such as the NFRF-International. Working with experienced coordinators and ensuring the capacity and commitment of all partners is established well before an application is submitted are seen as essential. Time is needed not only for partnership development but also for understanding contractual and compliance requirements (including GDPR and research security considerations) which are increasingly shaping partnership decisions and collaboration models and include involving multiple actors internally. Rushing this process carries reputational risk if institutional obligations cannot be met.

2.2 Application process and budget

A clear and well-prepared budget is essential for smooth proposal development and subsequent grant management. At the proposal stage, budgets should reflect actual costs, with institutions prepared to negotiate within the consortium. Personnel costs and person-month calculations are particularly critical and warrant careful attention.

A recurring challenge is how to present costs for highly qualified personnel (HQP). Actual graduate student salaries at Canadian institutions may appear low compared to European norms, which can create misalignment with consortium expectations and raise questions from reviewers.

A practical challenge noted across institutions is that Horizon Europe responsibilities are often carried as an additional workload by staff whose primary duties lie elsewhere, making it harder to build and sustain expertise over time. Template and tip sheets were highlighted as useful tools to support staff in managing this complexity.

2.3 Reporting and post-award support

While awareness of Horizon Europe reporting requirements is growing, significant gaps remain. A key priority is clarifying the respective responsibilities of administrative units and principal investigators and ensuring stronger internal coordination between them.

A central area of uncertainty is audits. For cost-based budgets exceeding €430,000, an external audit is mandatory, and its cost should be built into the initial budget. At this stage, no institution represented has direct experience with this process. Most have applied for lump sum grants and may not yet have cost-based projects above this threshold. Even so, it was recommended that internal reporting mechanisms be maintained for lump sum grants as well, for institutional oversight and organizational learning. Strict deadline tracking is particularly important in the lump sum context.

Timesheets are required to track personnel costs under cost-based budgets, and there is a recognized need to educate both researchers and administrative staff on their use. A practical challenge also exists around how to budget for researcher time and how to transfer these funds to researchers if a proposal is successful.

Developing clear budget templates (accounting for inflation, exchange rates, and benefits) was identified as a practical and widely needed tool. Dissemination and acknowledgement of Horizon Europe funding across research initiatives also requires attention, with a project manager or designated party responsible for this reporting.

Participants also noted the importance of early engagement with leadership (e.g. Deans) to ensure alignment on resource allocation, workload, and long-term institutional commitment to Horizon Europe participation. It is especially relevant when it comes to financial administrators. They should be involved early in the process and have a good understanding of Horizon Europe policies

and procedures to avoid surprises at the post-award stage. Unfortunately, the contrast between Tri-Agency and Horizon Europe budgeting and reporting requirements is stark, meaning existing institutional expertise does not readily transfer.

Developing processes comparable to those in place for CFI grants was identified as a desirable goal, though currently no resources are available to do so. Using overhead funds to finance a dedicated financial officer was suggested as one potential solution.

Canada's institutional structures differ meaningfully from European models, reinforcing the need for tailored approaches rather than direct replication. One practical suggestion was to develop, potentially in collaboration with ISED, a generalized timeline and checklist covering pre- and post-award processes.

Part 3: *Knowledge Exchange and Community of Practice*

A recurring theme was the need to strengthen knowledge-sharing mechanisms both within and across institutions.

Participants emphasized the importance of regular exchanges between internal units (pre-award, partnerships, and international offices) as well as thematic working groups to address specific challenges. the importance of creating regular exchanges between internal units (pre-award, partnerships, international offices).

Building local communities of practice was seen as a valuable approach, with the potential to feed into broader national and international networks. For example, UBC is currently leading a knowledge exchange group in this space. A dedicated CoP focused on budgeting, finance, and post-award processes was identified as a particular priority given the gaps highlighted throughout discussions.

CARA was highlighted as a key platform to support and scale such communities of practice at a national level. CARA has established a Horizon Europe Committee, composed of 13 volunteers. The Committee meets regularly to gather information, discuss current issues and coordinate activities. It also connects regularly with ISED to exchange information and identify opportunities for collaboration. Further, the Committee has setup a digital platform (MS Teams Channel) for asynchronous sharing of information on Horizon Europe and manages a mailing list of 160 members from multiple institutions across the country. Such tools could be further deployed to maximize sharing of best practices and relay any issues to decision-makers.

Outcomes and Impact

This workshop represented a concrete step toward establishing a national Community of Practice for Horizon Europe among Canadian research institutions. Immediate outcomes of the session include:

- Consolidation, through this report, of shared lessons and recommendations from 23 Canadian institutions into a single reference document for research offices and international offices engaging with Horizon Europe.
- Identification of post-award budgeting, finance and reporting as priority areas for a dedicated Community of Practice, building on existing local initiatives such as the knowledge-exchange group led by the University of British Columbia.
- Confirmation of CARA's role, through its Horizon Europe Committee, as the national platform to support and scale this Community of Practice, including continued exchange between pre-award, post-award and international office colleagues.

Looking ahead, participants identified the upcoming transition to the next European Framework Programme, expected to begin in 2028, as a strategic window for Canadian institutions to consolidate the institutional capacity, partnerships and administrative expertise discussed during this session. The CARA Horizon Europe Committee intends for this report to evolve over time as institutional experience accumulates. The Committee will coordinate the dissemination of this report, follow-up activities including gathering additional inputs and preparation of revised versions. Further initiatives will hopefully complement the report, including exchanges with international partners, notably during the upcoming INORMS Conference in April 2027 (held in collaboration with CARA in Montréal).

Annex: Lessons Learned and Best Practices from Institutions outside Canada

University of Otago, New Zealand

The University of Otago's Research and Enterprise team is approximately one year ahead of its Canadian counterparts in navigating the Horizon Europe funding landscape. Drawing on this experience, the team has identified six key lessons to support institutions beginning their own Horizon Europe journey.

Lesson 1: Horizon Europe is its own unique research ecosystem

Horizon Europe operates very differently from national funding schemes. Where national programmes typically support standalone research projects led by individual investigators, Horizon Europe is built around large-scale, mission-driven collaborations in which researchers from multiple institutions contribute expertise toward broad, policy-aligned goals. Therefore, Horizon Europe places a strong emphasis on demonstrable societal and economic impact, assessed against EU-defined metrics and positioning frameworks. Besides, the EU funding landscape has its own terminology, evaluation frameworks, and documentation conventions that differ significantly from national schemes.

Helping researchers understand and embrace this distinction is essential to aligning their mindsets with the programme's broader objectives. A key insight from Otago's experience is that research framing, proposal language, impact narratives, and logical structure must all be oriented through a European lens — even when the underlying research is global in scope.

Lesson 2: actively help researchers identify the right calls

Horizon Europe work programmes are dense and regularly changing. Research support teams play a critical role in helping researchers identify appropriate funding opportunities. A structured, three-step approach was found to significantly reduce wasted effort for all parties:

1. Scan centrally	Centralized scanning of upcoming calls to identify those relevant to institutional research strengths.
2. Sense-check	Early sense-checking of eligibility and strategic fit before researchers invest significant time.
3. Interpret ask	Help researchers interpret what a call is really asking for, ensuring proposals address the actual evaluation criteria.

Lesson 3: build institutional readiness early

Individual research teams cannot succeed in Pillar 2 without institutional infrastructure to support them. Association with Horizon Europe brings specific institutional requirements across four key

policy areas. Addressing these proactively allows research support teams to focus their energy on enabling high-quality proposals rather than managing compliance reactively.

Financial Regulations	Horizon Europe has specific, non-negotiable rules around eligible costs, financial reporting, and audit requirements that differ from most national frameworks.
Ethics & Data	Strict requirements govern research ethics, data management plans, and data protection compliance throughout the project lifecycle.
Open Science	Horizon Europe mandates open access publishing and open data practices for all funded projects.
Post-Award Culture	The collaborative, multi-partner nature of EU projects creates a distinct project management culture that institutions need to be prepared for operationally.

Institutional readiness as long-term investment

The institutions that perform well in Pillar 2 treat participation not as a series of isolated applications, but as a long-term capability investment. This means training research support staff in EU-specific processes, developing internal systems for managing person months and financial compliance, and creating support structures that allow any research team to engage with an opportunity quickly when it arises.

Lesson 4: Building Capability Through Iterative Learning

Pillar II is highly competitive, even for institutions with decades of EU experience. For those new to the programme, the most effective approach is to adopt a long-term, iterative mindset, treating early applications as a structured learning process rather than immediate shots at funding.

Evaluator feedback in Horizon Europe is typically detailed and substantive. Systematic analysis of this feedback across applications is one of the most reliable ways to identify institutional gaps and improve future proposals.

1. Apply & learn	Treat early applications as part of a deliberate learning process, with the explicit goal of understanding evaluator expectations and programme conventions.
2. Use feedback	Analyze evaluator comments carefully to identify recurring gaps in proposal framing, evidence, or alignment with EU policy goals.
3. Build confidence	Progress gradually from partner to workpackage lead. This is a smart, risk-reducing progression over time.

Lesson 5: invest in building strong international partnerships

Successful Horizon Europe teams begin cultivating international partnerships well before any specific call is announced. Early partnership development involves building shared understanding, aligning research agendas, and establishing clear roles and expectations among consortium members. This groundwork lays the foundation for smoother and more effective collaboration throughout the project lifecycle.

The following three-step approach, used by Otago, supports early and effective consortium entry:

1. Engage early	Use National Contact Points (NCPs) and attend brokerage events to begin building relationships with potential European partners well in advance of any specific call. Use long-standing relationships to form networks.
2. Monitor drafts	Keep a close watch on draft Work Programmes to identify relevant topics coming down the pipeline, allowing time for early positioning and partner alignment.
3. Signal leadership	Rather than approaching partners with an offer to contribute, clearly communicate what your team can lead. Offering to take ownership of a work package significantly increases your attractiveness as a partner.

Managing geographic distance

For institutions in countries such as New Zealand, geographic distance is a genuine logistical factor. However, it is not an insurmountable barrier to successful Pillar II participation. Effective distance management relies on clear planning and communication rather than proximity.

Lesson 6: sustain support beyond the funding decision

Research support should not be concluded once a project is funded. Structured onboarding processes and ongoing shared learning across the research team contribute meaningfully to reducing compliance challenges later in the project. Continued engagement from research management staff — including through structured project monitoring and shared learning forums — is essential to long-term project success.

Key takeaway

The overarching lesson from Otago's experience is the value of building researcher confidence through partnership. Treating research management as a genuine collaboration between support staff and researchers has been central to the university's success in Horizon Europe.

Centre National de la Recherche Scientifique (CNRS), France

CNRS ranks as the top beneficiary and leading participant in Horizon Europe (across the three pillars). With a network of around 100 engineers specialising in European projects, CNRS offers personalised support in setting up a coordinated collaborative project. They shared some precious advice to help prepare budgets.

For grants with actual costs:
- Check eligibility of costs and provide proper justification
- Use overheads to cover some ineligible expenses (allocate costs for permanent staff and reclassify them as “overheads” for the laboratories)
- Personal costs are not easy to harmonize
- Equipment depreciation: demonstrate X% utilization on the project, which requires the establishment of a laboratory notebook and/or equipment
- Internal services: ensure that the cost calculation for the use of internal platforms is auditable

For lump sums grants:
- A more thorough and careful budget planning process is required, compared to the reimbursement of actual costs
- All expenses must be eligible
- Work packages implementation is critical: establish robust governance and monitoring processes
- Reviewers can cut the personnel costs, if not properly justified
- Check the average costs on the dashboard, and if your expenses exceed them, explain why

Federal Working Group of EU Liaison Officers at Higher Education Institutions, Germany

The "Bundesarbeitskreis (BAK) der EU-Referent/innen an Hochschulen" helps standardize advice, resolve administrative issues, and share best practices through specialized working groups (e.g., law and project management) across German academic institutions. It also relays administrative issues to policymakers like the German Federal Ministry of Research, Technology and Space. The group shared the following generic advice.

- Raise awareness among researchers and ensure that timesheets are completed
- Always double check calculations on personnel cost. This category still is the most error prone. Strictly apply the fixed divisor of 215 days when calculating daily rates based on annual salaries.
- Make sure to follow your institution’s rules for the purchase of goods and services, keep all necessary documents from offers to invoices, all clearly showing a reference to the project, be it the acronym or GA number.
- A kick-off meeting before the project’s start is very helpful to advise the project team of the dos and don’ts of EU grant management.
- A regular exchange between pre-award and post-award teams helps eliminate problems and streamline processes.

Ludwig-Maximilians-University of Munich, Germany

LMU Munich is among Germany's most research-intensive universities and one of the top recipients of EU funding in the country. Researchers are supported centrally through the international branch of the Research Office, from proposal preparation to project implementation and reporting. The team has implemented the following processes.

Although many internal divisions need to be aware of the specificities of Horizon Europe, it is important to identify a unit within the central administration that would be the point of contact and notably have the responsibility to follow headlines, stay up to date about the publications of new

documents and other important announcements. In our case this is the pre-award team, because this is the one in contact with other external stakeholders (NCPs, national and international working groups…). This unit leads an internal "Horizon Europe working group" composed of representatives from other units (financial, audit, legal). It disseminates relevant information but also ensures that any issues in post-award are communicated and shared with others internally. This regular exchange of information is essential to improve internal support, pre- and post-award processes and mitigate risks.

Multiple resources can be used to ensure smooth management of the grants:

- Tailored guidelines summarize key aspects that include all relevant internal contact person, clarify responsibilities, specify internal processes
- Workshops on project management are organized for researchers as well as administrators at the faculty level, in collaboration with all central units involved in post-award. This one-day workshop includes an overview of the eligibility of costs, important documents, reporting processes, and includes exercises based on real projects at the university. If organized in person, those events are also a good opportunity to break the barriers between researchers and the different administrative levels.
- For successful projects, a meeting is organized during the grant preparation phase between units in charge of pre- and post-award to ensure that all project specific information is efficiently communicated
- After signing the grant agreement, a kick-off meeting is organized with the PI, their administrative team, the faculty and central administration to go through the guidelines and internal processes, clarify questions and responsibilities before the project starts and discuss any project-specific aspects.
- During project implementation, the research office will contact PIs involved in projects that have been previously identified as important (due to the budget size or any other specific aspect), ahead of financial reporting to eventually identify any problems early.
- The internal unit in charge of audits will also implement internal audits at regular intervals to identify potential errors.

EURAXESS North America, United States

EURAXESS North America is a European Commission initiative that gives researchers in the United States and Canada free access to information on research in Europe, funding opportunities, international collaboration and transnational mobility.

In the United States, some universities have dedicated teams supporting Principal Investigators leading consortia. They include administration, finance, research writing (post docs), ethics, research security (internally dedicated to project or consultant).

References and Resources

The following official resources may be useful for institutions following up on the topics discussed in this report:

- Horizon Europe (European Commission overview): https://research-and-innovation.ec.europa.eu/funding/funding-opportunities/funding-programmes-and-open-calls/horizon-europe_en
- EURAXESS North America: https://euraxess.ec.europa.eu/worldwide/north-america
- Canada's Horizon Europe National Contact Points (Innovation, Science and Economic Development Canada): https://ised-isde.canada.ca/site/ised/en/horizon-europe-contact-information
- Canadian Association of Research Administrators: https://cara-acaar.ca/
- EU Funding & Tenders Portal: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home
- Horizon Europe Online Manual: https://webgate.ec.europa.eu/funding-tenders-opportunities/spaces/OM/pages/1867795/Online+Manual
- Horizon Europe Standard Application Form: https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/temp-form/af/af_he-ria-ia_en.pdf
- Horizon Europe Reference Documents (including timesheet template): https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/reference-documents?programmePeriod=2021-2027&frameworkProgramme=43108390