



ENRICHERS
TRANSATLANTIC

GUIDE FOR APPLICANTS
***1ST CALL FOR OPEN IDEAS AND
CHALLENGES***



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1 INTRODUCTION

The document provides information and step-by-step guidance to support the participation in the first call of the Next Generation Internet Transatlantic Fellowship programme, namely the Open ideas and challenges call. NGI Enrichers is an European initiative funded under the Horizon Europe Research and Innovation Framework (HE), Grant Agreement number: 101070125, Call identifier: HORIZON-CL4-2021-HUMAN-01.

In addition to these guidelines, applicants are invited to get acquainted with the NGI Enrichers website and the additional documentation such as the application form and required materials etc.

1.1 GLOSSARY

Within the guidelines, you may find the following abbreviation and terms. Unless stated otherwise, the meaning of the terms shall be interpreted as presented below:

- **NGI Enrichers/Enrichers/Fellows:** Researchers and Innovators who will apply and potentially be selected to participate in the NGI Enrichers Programme. In the Application phase they are called **applicants**, while in the contracting phase, they will be defined as **beneficiary or fellow**.
- **European organisations:** organisations established in an EU Member State or Horizon Europe Associated Country.
- **US or Canadian Host Organisation:** US and Canadian organisation involved in the domain of Next Generation Internet hosting the Enricher.
- **Mentor:** expert appointed by the project to assist the Enricher with on-demand services before, during, and after their expedition.
- **Evaluator:** independent expert appointed and paid by NGI Enrichers to evaluate the applications of potential Fellows for the NGI Enrichers Fellowship programme.
- **Expedition:** 3 to 6 months fellowship stay for EU Fellows in US or Canadian Host Organisations.
- **Bootcamp:** Pre-departure immersive bootcamp to introduce the different NGI Enrichers and their projects and to prepare them for the expedition.
- **NGI Enrichers Consortium:** a team of 12 partners led by GAC Group (FR). The full list of members is available on the [NGI Enrichers website](#).
- **NGI Enrichers Programme Coordinator:** GAC Group (FR).

1.2 THE NGI INITIATIVE – NEXT GENERATION INTERNET



The **Next Generation Internet (NGI)** is a European Commission initiative that aims to shape the development and evolution of the Internet into an Internet of Humans. An Internet that responds to people's fundamental needs, including trust, security, and inclusion, while reflecting the values and the norms all citizens enjoy in Europe.

The European Commission investment in NGI research already supported around 1,000 Internet researchers and innovators involved in numerous projects. These investments will continue under the Horizon Europe programme to support top Internet innovators in the areas of:

- Trust and Data Sovereignty on the Internet;
- Trustworthy Open Search and Discovery;
- Internet Architecture and Decentralised Technologies;
- EU-US and EU-Canada cooperation and collaboration and related topics and application domains (see subsection 1.3.2 below).

1.3 NGI ENRICHERS FELLOWSHIP PROGRAMME

The **NGI Enrichers programme** supports European NGI researchers and innovators to spend 3-6 months in the US or to Canada. During the expeditions, researchers and innovators will work and collaborate with US and Canadian hosts organisations, enhancing knowledge-sharing and establishing long-term collaborations on NGI technologies, services, and standards. NGI related topics are explained in [subsection 1.3.2](#) below.

The programme provides **travel funding** and **living allowance** for visiting Fellows from Europe. It supports both Fellows and their host institutions with activities such as bootcamps, training, mentorship sessions, and community building.

The NGI Enrichers programme will launch **three rounds of calls**; this document refers to the 1st call, Track "Open ideas and Challenges". Each application round of the Programme encompasses three stages:

- **Selection phase:** At this stage applicants will submit their proposals for collaboration in the NGI field. Evaluators will select a limited number of EU Fellows from the pool of applications received, based on the excellence and impact of their proposals. Once selected, successful applicants will be invited to join the pre-departure immersive bootcamps (see [subsection 2.2](#) below for more information about the bootcamp and dates).
- **Pre-departure immersive bootcamp:** The objective of this phase is to prepare the selected Fellows for their exchange to North America. Beneficiaries will take part in activities to present their NGI projects, discuss administrative requirements and learn about tools and knowledge necessary for a successful exchange.
- **Expedition phase:** Once completed the bootcamp, applicants will sign the contract (called "sub-grantee agreement") and start their expedition. The expedition duration range from 3 to 6 months. Fellows will spend their expedition in the US or Canadian hosting institutions. During the expedition,

Fellows will be able to access on-demand support services for business development etc. They will also join online mentoring and peer-to-peer collaboration activities.

1.3.1 Which are the general requirements to apply to the Programme?

The Programme aims to support applications from EU Fellows with a proven track in the NGI sector. They can be:



Researchers (scientific/technical/engineering) working on different NGI relevant topics and application domains in the not-for-profit sector (e.g. higher education institutes, research infrastructures, non-profit organisations and charitable foundations, public research centres, etc.)



Researchers (social sciences and humanities) Social sciences and humanities researchers which can contribute to NGI relevant topics and work in the not-for-profit sector (e.g. higher education institutes, research infrastructures, non-profit organisations and charitable foundations, public research centres, etc.)

Researchers (multidisciplinary) working at the intersection of social and nature sciences, including technology, sociology, economics, environment, art, design, which can contribute to NGI relevant topics and work in the not-for-profit sector (e.g. higher education institutes, research infrastructures, non-profit organisations and charitable foundations, public research centres, etc.)



Innovators/Entrepreneurs working in different NGI relevant topics and application domains in the for-profit sector (e.g. start-ups, large companies, etc.).

The minimum **education requirement** is:

- **Master's degree for Researchers**
- **Bachelor's degree for Innovators/Entrepreneurs;** however, practical/associate degree might also be considered based on the quality of the project submitted, experience and other qualifications.

Applicants of any nationality are welcome, but they shall be current (at the moment of the application) **residents/taxpayers in an EU Member State or Horizon Europe Associated Country** ([updated list published by the EC](#)), as defined by the European Commission legal framework, or in **Switzerland**. This means that



applicants can **be employed** by a “legal entity” established in any of those countries or created under EU law, **or self-employed** (e.g. project owners).

Additional eligibility conditions will be presented in the following paragraphs.

1.3.2 Which are the research, technology and application domains?

Researchers and Innovators will have the chance to collaborate on **multidisciplinary topics** related to Next Generation Internet:

- **Human-centric internet values:** Autonomy, Interoperability, Cooperation, Openness, Inclusivity, Data protection, Data sovereignty, Data privacy, Transparency, etc.
- **Research and/or technology domains**, such as, IoT, 5/6G, Artificial Intelligence, Big Data, Blockchain, Cloud and Edge computing, Cybersecurity, Quantum computing and algorithms, Xtended Realities, Peer to peer technologies, Virtual Realities, Decentralized Internet, Trust, and data sovereignty, metaverse, digital commons, Web 3.0, greening of ICT, etc.
- **Application domains:** health, environment, energy transition, Industry 4.0, e-mobility, Autonomous V2X, immersive environment, intuitive user experience, lifelong learning, inclusiveness, digitalization, etc.

The programme will also support **any other technological foundations** on which future services and platforms will be built, with a human-centric approach considering social participation, open Internet, respect of the user’s consent, privacy, and security issues.

The list is not exhaustive, and it is up to the applicant to argue the relevance of the proposed topic to Next Generation Internet.

Applicants from **Social Sciences and the Humanities (SSH)** who believe they can contribute to Next Generation Internet related projects in technology fields are encouraged to apply as well.

1.3.3 What are the participation options?

The call offers two participation options:



Challenges: Hosting organisation from US and Canada – which have agreed to collaborate with the NGI Enrichers programme - defines specific research topics (challenges) related to the Next Generation Internet domain. The applicant can submit a proposal answering a challenge defined by the hosting organisation.



Participants are encouraged to choose this track if none of the proposed challenges matches their envisioned project or skills.

Open ideas: applicants submit a proposal around their ideas, products or services, selecting three preferred hosts among the list of organisations collaborating with the NGI Enrichers programme. The programme will facilitate the best match between the applicant and the host organisations based on the idea, product or service which has been proposed.

Note: Applicants should first check the available challenges and try to find a match with their project. If no challenges fit their idea, they have the option to apply for Open ideas track and submit their proposal selecting up to three host organisations among the available ones. **Please note that it is not possible to apply with the same project to both tracks: you select either a challenge or a submit an open idea.**

1.3.4 Who are the US and Canadian Host organisations?

Host organisations are public and private actors from the **US and Canada Internet ecosystems**. By bringing together academics and industry organisations, NGI Enrichers will ensure that EU Fellows can establish relevant research or innovation collaborations and exchange with US and Canadian NGI actors.

For the **Open ideas and Challenges call**, host organisations sign a separate **Memorandum of Understanding** with the NGI Enrichers programme. The list of Host organisations (and respective challenges, if any) can be found in the [NGI Enrichers official website](#).

Note: Host organisations that have signed the MoU can participate in two ways: by hosting fellows and by proposing challenges. They can also decided to do both: be open to host fellows with their own project and design challenges relevant to their area of interests.

1.3.5 Who is managing the Fellowship programme?

The NGI Enrichers project and its Fellowship programme are run by a consortium of twelve partners:





G.A.C. Group is a R&I management consultancy with headquarter in France and offices in other countries, with over 200 staff members and 2000+ private clients, including many innovative SMEs and start-ups, and having over 320 R&I partners across the world. G.A.C. particular focus is on innovation, performance for impact and international R&D and innovation collaboration.



APRE is an Italian not-for-profit association with the mission to support the Italian scientific and industrial communities in accessing the opportunities of the Framework Programmes for R&I of the EC. APRE hosts the NCP for HE, and is a member of the EEN. It is present in +60 States worldwide, with +600 network nodes. APRE has a long-lasting experience in R&I international cooperation and science diplomacy activities, counting 83 partners outside the EU.



SPI is a private consulting company with headquarters in Portugal and an active centre of national and international networks connected to the R&I areas. From its onset, SPI has embraced the mission of managing projects that foster innovation and promote international opportunities, knowledge management, R&I, and entrepreneurship.



ENRICH GLOBAL is not-for-profit association with motto "Taking European innovation global". Several members of ENRICH GLOBAL are based in the US and are members of this consortium.



MITACS is a Canadian national network gathering companies, universities and local governments to develop R&D&I projects in CA. MITACS Globalink programme is designed to select specialists for a research internship supervised by one of the 66 Canadian member universities. The MITACS Accelerate programme has already supported over 10,000 internships nationally through its main programmes. MITACS works with 70+ partner





universities in Canada and with thousands of companies.

NCURA is a US not-for-profit professional society dedicated to advancing the profession of research administration through education and professional development programmes, the sharing of knowledge and experiences, and the fostering of a diverse, collegial, and respected global community.



EAEC is a US private member-driven social enterprise and Network. It is also part of the EEN 600+ organizations in the EU, and a worldwide presence, and aims at promoting Transatlantic cooperation, collaboration, trade and investment between EU and North-American companies, institutions and economic regions while fostering (Open) Innovation and Entrepreneurship.



TEMPLE is a US public university with eight campuses. As a Carnegie Classified R1 "Doctoral University with Highest Research Activity", TEMPLE runs a variety of research, education, and commercialization centres and institutes, including the Small Business Development Center leading the "ENRICH in the USA" initiative since January 2021.



AEI is an Ukrainian research and consultancy organisation acting as an innovation bridge between science, business, authorities and other stakeholders. AEI is a multidisciplinary team specialized in project management, analytical studies, dissemination, communication and public engagement.



HEAL – iSolutions Cybersecurity Agency is a spinoff company founded by an award-winning team based in Ukraine, US and Spain (R&D hub is based in Kyiv). The core technological solutions provided by HEAL include AI, federated learning, situation awareness, reasoning and decision support techniques.





FERMILAB is the main American particle physics laboratory and collaborates with more than 50 countries on physics experiments based in the US and elsewhere. Its mission is to drive discovery by performing pioneering research with national and global partners and developing new technologies for science. Funded by the Department of Energy, and located at Fermilab, Illinois, US, the Superconducting Quantum Materials and Systems (SQMS) is a national centre, with an international flavour, to bring about transformational advances in quantum information science as a part of the U.S. Quantum Initiative.

EUrelations is the first Research and Innovation Management Agency (RIMA) founded in Switzerland in 2005. EURelations designs and manages complex national and international collaboration projects, and supports the acquisition of funding and the know-how transfer between scientific disciplines and industrial sectors. EUrelations also develops methods and more systematic approaches for boosting research and innovation (R&I).

TABLE 1: NGI ENRICHERS CONSORTIUM

1.3.6 Who is funding the Fellowship Programme?

Financial support to selected Fellows for travel and subsistence in North America will be 100% sponsored through **EU public grants**. The NGI Enrichers Programme is made possible thanks to the strategic plan defined by the European Commission as part of the Next Generation Internet initiative. Funding will be released under a lump sum scheme plus travel reimbursement cost (see section 8 for further details on payment releases). The NGI Enrichers programme benefits also from **additional funding** allocated by the **Swiss government**.

All selected applicants will sign a dedicated Sub-grantee Funding Agreement with the NGI Enrichers Consortium coordinator, G.A.C. The funds attached to the Sub-grantee Funding Agreement come from the funds of Horizon Europe programme; the NGI Enrichers Consortium is managing the funds according to the **Grant Agreement Number 101070125** signed with the European Commission.

The relationship between the selected applicants and the European Commission through the NGI Enrichers Programme carries a set of obligations. It is the task of the selected applicants to comply with them, and of the NGI Enrichers Consortium to keep them adequately informed.



2 TIMELINE

The 1st Open ideas and Challenges call is part of the first round of applications and will follow a timeline in three stages, as explained in the introduction to the Fellowship Programme (see [section 1.3](#)).

2.1 SELECTION PHASE

1 Submission

Opening: The Open Ideas and Challenges call for proposals opens on the F6S platforms on **February 1st, 2023**.

Deadline: The deadline for submission via F6S Platform is the **March 31st, 2023 23h59 Brussels time**.

2 Evaluation

Evaluation period: Indicatively 2 months from the deadline to evaluate potential Fellows' applications for the first call "Open ideas and Challenges".

2.2 CONTRACTING

3 Contracting

When? The contracting process will take **as of April 2023, once the evaluation process is finalised**. Once signed the Sub-grantee Funding Agreement, Fellows will be ready to leave and to join the respective Host organisations.

What? Fellows will be asked to sign the Sub-grantee Funding Agreement and the required documentation for Contracting.

2.3 BOOTCAMP AND DEPARTURE

4 Bootcamp

When? Starting from **April 2023**

5 Departure

What? The bootcamp will be structured as follow:

- **Three virtual asynchronous trainings** prior to the bootcamp focusing on the “Perfect Pitch”, “Which visa do you need?”, and “NGI Fellows Tools and Platforms”. They will be accessible starting from April 2023.
- **Two-days in-person joint pre-departure bootcamp** which will take place **on 15-16 May 2023 in Rome**, at Temple University Rome Campus. Fellows will acquire the knowledge necessary for a successful exchange. Sessions will include: presentation of the EU-US, EU-CA and CA-US relationship, different cultural and business practices US/CA versus EU in negotiation, IP guidance, debate, teamwork and cooperation. Plus, an overview of the transatlantic R&I ecosystems and possible collaborations, alternative sources of funding and a farewell networking cocktail where local NGI stakeholders will be invited.
- **Half-day virtual bootcamp** to further explore the knowledge acquired during the in-person training. It will be country specific (Canada & USA).

Starting of the expedition The expedition can start **as of May 2023**, once the two-days in-person joint pre-departure bootcamp has been completed.

During the expedition – The Fellow will have access to a virtual on-demand mentoring programme and peer-to-peer collaboration discussion carried out through a dedicated Community Management Platform. They will also have to draft a short mid visit report (see [section 7.1](#)).

Ending of the expedition - The expedition ending will depend on the number of months requested by Fellows during the

application phase (3 to 6 months). At the end of the expedition, Fellows will be required to send a final report (see [section 7.1](#)) and to participate in the final event/Award ceremony on-line. **Ending of expedition for the first round of calls should be before the end of December 2023.**

Note: dates are initial estimates and might be subject to slight variations if agreed by the NGI Enrichers Consortium for the benefit of the Fellows.



3 LEGAL REQUIREMENTS

3.1 COUNTRY OF RESIDENCE

The NGI Enrichers Fellowship Programme is open to researchers and innovators of **any nationality**.

Applicants shall be **residents/taxpayers in:**



- **Member States (MS)** of the European Union (EU), including their outermost regions.
- **Overseas Countries and Territories (OCT)** linked to EU Member.
- **Horizon Europe Associated Countries** according to the [updated list published by the EC](#).
- **Switzerland**

TABLE 2: ADMISSIBLE COUNTRIES OF ESTABLISHMENT

This means that applicants can be:

- **Employed** by a “legal entity” established in any of those countries or **created under EU law**.
- **Self-employed** (e.g. project owners).

3.2 EDUCATION

The minimum **education requirement** is:

- **Master’s degree for Researchers**
- **Bachelor’s degree for Innovators/Entrepreneurs** (however, practical/associate degree might also be considered based on the quality of the project submitted, experience and other qualifications).

3.3 PASSPORT AND VISA

Applicants willing to join the programme must comply with the following eligibility criteria:

- Hold a **valid passport**
- If needed, being **eligible to receive a visa** from the US (J1 Exchange Visitor Visa) or Canada (Visitor Visa) government and comply with **medical insurance** rules (if any).





A **J-1 Visa** is one of the recommended visas for Fellows willing to spend their expedition in the US. A J-1 visa is a non-immigrant visa issued by the United States to research scholars, professors and exchange visitors. Information concerning J-1 visa application can be found at the following [link](#).



A **Visitor Visa** is the official recommended visa for Fellows willing to spend their expedition in Canada. The Visitor visa is a non-immigrant visa issued by the Canadian government to everyone who wants to spend up to 6 months in the country. Support concerning Visitor visa application can be found at the following [link](#).

TABLE 3: VISA REQUIREMENTS FOR US AND CANADA

Note: It is the **responsibility of the NGI Enricher** to ensure that the authorisations required (short or long-term stay visas or residence permits) are in order before the planned fellowship takes place (visa and medical insurance).

It is strongly recommended for authorisations to be requested from competent authorities **well in advance**, since the process may take several weeks.

The host organisation **will support Fellows** by providing an invitation/host letter for the visa. Additionally, the consortium will host a **webinar** for the fellows assisting them in choosing the right visa option for their travels in the US and in CA (if longer than 3 months).

VISA and travel protection insurance costs will be reimbursed upon cost justification. This is explained by the fact that VISA costs are subject to differences depending on travel duration and country of choice. It is the intention of this Action to avoid or remove any possible barrier to a fair access to this opportunity (see section 8).

3.4 CUMULATIVE FUNDING

Additional funding is defined as resources which the applicant has already secured by applying to previous calls or programmes. These resources are being used to develop the same idea/project which will be presented to the NGI Enrichers programme. If this is the case, the following logic apply:

- **Case 1 – Running project:** If the applicant has already secured funding for the same research project from another funding agency, and he will travel to the US/Canada and report to this funding agency, then it is not possible to cumulate funding of NGI Enrichers. However, the applicant can submit the application during the next call NGI Enrichers in 2023 or in 2024, when the first funding source will be over.



- **Case 2 – Running project near to conclusion** - If the applicant is already in the US/Canada to develop a project and wants to extend his stay with another research project (after the first one is concluded), he can apply to the NGI Enrichers Programme. However, he will not need travel cost coverage (this information should be highlighted in the application). Notice that the fellowships travel of NGI Enrichers , 1st cohort, starts in spring 2023 - summer 2023, so the new research project should start from this date (and consequently the previous research project should end before).
- **Case 3 – Funding complementing NGI Enrichers Fellowship:** Applicants can secure funding that complements the NGI Enrichers Transatlantic Fellowship (for instance, covering the additional expenses in the USA/Canada, such as lab cost or extra living expenses etc.). This additional funding can be requested on the same research project if the applicant confirms that the resources have been secured thanks to the application to the NGI Enrichers Transatlantic Fellowship programme.



4 SUBMISSION OF PROPOSAL

Submission of applications will be carried out via **F6S platform**, which directly links from the NGI Enrichers website. In order to successfully submit their proposal, applicants are required to:

- **Read carefully the relevant documents.**
- **Register their profile in the F6S platform.** Submissions received by any other channel will be automatically discarded.
- **Prepare the documentation for submission** presented and detailed below.

Note: it is strongly recommended **not to wait until the last minute** to submit the proposal. Inability to meet the call deadline (including technical issues and/or communication delays on the applicant's side), will automatically lead to rejection of the submission. The time of receipt of the proposal as recorded by the submission system in the F6S platform will be final.

4.1 DOCUMENTATION FOR SUBMISSION

To apply to the Open ideas and Challenges call applicants will be asked to fill the **application forms**.

The application forms are embedded in the F6S platform. The reference templates for the Online Submission Form can be found at the following links:

- [Form](#) to apply to Challenges;
- [Form](#) to apply to Open ideas;

Questions included in the form are complemented by a pitch deck designed to collect information concerning the project. The pitch deck template is explained in the following section and can be downloaded from the NGI Enrichers website.

All the submission documents have to comply with the following requirements:



PDF



Format: Any document requested in any of the phases must be submitted electronically with no restrictions for printing.

Language: English is the official language of the NGI Enrichers Programme. Proposals submitted in any other language will not be considered (except for administrative documents drafted in French by



- For Open ideas applicants: why are you interested in the host organization selected?
- **Timeline and milestones** - timeline and milestones of your project for the next 12 months (if it has already started, please include also an overview of the past 6-months), existing relationships and partnerships (e.g. Universities, Research Labs, Corporations), R&D funding already obtained or to be obtained.
- **Expected outputs**, outcomes and impacts of the expedition including the implementation strategy of project's results and the technology transfer approach (just if you plan to commercialize your solution).
- **Motivation** - how the project contribute to the Human-centric approach considering social participation, open Internet, respect of the user's consent, privacy, inclusion, resiliency, respect for the environment, sustainability, security, etc.

As explained in section 5.2.4, applications with a **score between 15/25 and 20/25** will be invited to **present their pitch deck** to the NGI Enrichers evaluation team and host organisation during a dedicated interview.

Note: The presentation **do not have to exceed** the number of slides already included in the template. Additional slides will not be considered.

4.2 PARTICIPATION OPTIONS

Has explained in sub section 1.3.1, the call has two participation options: challenges and open ideas. Depending on the participation option selected, the applicant will have to go through two different matchmaking process, structured as follow:



Challenges

What do you have to do? You will have to **select a challenge among the ones** defined by the US and Canadian hosting organisations part of the NGI Enrichers programme.

Who will select the hosting organisation? The hosting organisation will be the one who has launched the Challenge you selected to apply for.





Open ideas

Participants are encouraged to choose this track if none of the proposed challenges matches their envisioned project or skills.

What do you have to do? You will submit a proposal around your idea, product or service and **select three preferred hosts** among the [list of organisations](#) collaborating with the NGI Enrichers programme. You should identify and select the preferred US or Canadian host taking into consideration common priorities, such as your profile (Researcher or Innovator) and the focus are of your idea, product or service.

Who will select the hosting organisation? The programme will facilitate the best match between the applicant and the host organisations based on the idea, product or service which has been proposed.

Note: Applicants should first check the available challenges and try to find a match with their project. If no challenges fit their idea, they have the option to apply for Open ideas track and submit their proposal selecting up to three host organisations among the available ones. **Please note that it is not possible to apply with the same project/idea to both tracks: you select either a challenge or a submit an open idea.**

4.3 SUPPORT AND SUBMISSION ERRORS

NGI Enrichers offers a **dedicated support channel (FAQ)** available at the [following link](#). All submitted questions will be answered via this page and available for all applicants.

Should the applicant **discover an error** in their submitted proposal, and provided the call deadline has not yet passed, they may contact the NGI Enrichers team at contact@enrichers.ngi.eu to request the possibility for re-submission. Only the latest version submitted before the call deadline will be considered for evaluation.

Note: Requests of re-submission or inquiries about the submission system or the call itself, received **after** the closure time of the call **will neither be considered nor answered**.



5 EVALUATION PROCESS

The evaluation process encompasses two steps: an **admissibility check** of the proposal and an **evaluation** performed by external experts. A schematic overview of the evaluation process is presented in the following sections.

5.1 ADMISSIBILITY CHECK

NGI Enrichers teams will filter submitted applications to discard the ones which do not comply with the admissibility criteria summarised below:

- The candidate has a **valid passport (confirmation by the applicant)**.
- When applying for funding the candidate is a **resident/taxpayer in an EU Member State, Horizon Europe Associated Country or Switzerland**, as defined in section 3.1.
- The candidate complies with the **education requirements** listed in section 3.2.
- The application has been submitted, before the call deadline, through the **F6S platform** and includes the attachments (the CV, etc.).

Note: Proposals marked as non-admissible will get a **rejection letter** with the reasons for being declared as such. No further feedback on the process will be given.

5.2 EVALUATION

Once completed the eligibility check, proposals will move to the evaluation performed by a team of external evaluators.

5.2.1 Who is involved in the evaluation?

Every proposal will be assessed by at least **two external evaluators** with different profiles (scientific, technical, engineering, social sciences/humanities and/or business). External evaluators will be recruited by the NGI Enrichers team and required to sign a code of conduct to avoid any potential conflict of interests.

5.2.2 Which are the evaluation criteria?

Proposals will be evaluated considering **five criteria**, each with the same weight on the overall score:



20%	<i>Excellence</i>	Experience, expertise and background of the candidate.
20%	<i>Originality and technical quality of the idea, concept or product</i>	
20%	<i>Vision and potential impact</i>	<p>Evaluated in terms of:</p> <ul style="list-style-type: none"> • Capacity to have a global impact. • Contribution to sustainable, high-quality jobs in the EU. • Contribution to the EU internet policy objectives by supporting a human-centred approach to technology development and sharing the EU vision and values with US and Canadian counterparts.
20%	<i>Technical quality of the proposed implementation</i>	
20%	<i>Quality of the overall application and motivation of the candidate</i>	

TABLE 5: EVALUATION CRITERIA

5.2.3 How evaluators will score proposals?

Reviewers will evaluate the proposals considering the above criteria. Each **criterion will yield a score from 1 to 5**. Decimal scores may be given. For each criterion under examination, score values correspond to the following assessments:

Result	Score	Details
Very poor	1	The criterion is addressed inadequately, or there are serious inherent weaknesses.
Poor	2	While the proposal broadly addresses the criterion, there are significant weaknesses.



Fair	3	The proposal addresses the criterion well, although improvements would be necessary.
Good	4	The proposal addresses the criterion very well, although certain improvements are still possible.
Excellent	5	The proposal successfully addresses all relevant aspects of the criterion in question. Any shortcomings are minor.

TABLE 6: EVALUATION SCORES

5.2.4 How is the evaluation structured?

The scientific evaluation will follow two steps:

1 Selection

Up to **18 applicants** will be selected at the end of the evaluation and invited to sign a contract – Sub-Grantee Funding Agreement – to participate in the NGI Enrichers Fellowship programme.

A minimum average **score of 15/25 for the overall score** will be the threshold required. Candidates with a **score between 15/25 and 20/25** will be interviewed by the host organisation along with the NGI Enrichers Team to present their pitch deck. Candidate with a **score between 21/25 and 25/25** will be interviewed by the sole host organisation.

For the **1st call for Challenges**, the host organisation leading the interview will be the one who has launched the Challenge selected by the applicant.

For the **1st call for Open ideas**, the interview will be led by the host organisation who has been indicated as first choice by the applicant. Only in case of a negative outcome resulting from the first interview, a second interview with other US or Canadian hosts will be organised, following the order set by the candidate in the selection of the three preferred host organisations.

In the case of a draw in the final scoring, the following criteria will be used (in descending order of priority):

- Higher score for the **'Excellence'** criterion
- Higher score for the **'Impact'** criterion.
- Higher score for the **'Implementation'** criterion.

The remaining candidates above the threshold will be included in a **backup candidate pool**.

2 Communication

Evaluation results will be compiled into a short **Evaluation Summary Report**, which will be sent out to applicants after being approved by the NGI Enrichers Consortium and external evaluators. Depending on the evaluation outcome applicants will receive via email:

- **Acceptance letter**, including the Evaluation Summary Report (ESR) and the invitation to the contracting phase and following steps.
- **Rejection letter**, including the Evaluation Summary Report (ESR) and a notification of inclusion in the backup candidate pool of conditions apply).

TABLE 7: EVALUATION STEPS

The list of selected fellows will be published on the web site of NGI Enrichers.



6 CONTRACTING PHASE

Indicatively, up to **18 selected applicants** - hereinafter defined as Fellows or Beneficiaries - will be invited to join the pre-departure immersive bootcamp, as explained in [section 2](#). In the meantime, they will finalise the contract to become Beneficiary of the NGI Fellowship Programme (NGI Enricher).

The goal of the contracting phase is **to fulfil all legal requirements** between the NGI Enrichers Consortium and every selected Enricher in the Open ideas and Challenges call.

A **Sub-grantee Agreement** will be signed between the NGI Enrichers Consortium (represented by its coordinator, GAC) and the selected applicant (Fellow).

Note: For the preparation and signature of the Sub-grantee Agreement, all mandatory documentation (see below) will be requested by the NGI Enrichers Consortium, with clear deadlines. Failure to meet any of these set deadlines will directly end the process and result in the applicant's rejection. Candidates on the backup pool will take the place of the rejected applicant instead.

6.1 MANDATORY DOCUMENTATION

If selected, fellows will be required to present:

- A copy of a **valid passport** (or residence permit if applicable);
- The **bank account details** where the funds will be transferred (in euros for all Fellows except Swiss passport holders, for which the account should be in Swiss Francs).

6.2 INTELLECTUAL PROPERTY RIGHTS

Fellows will need to agree the IP rights with the host organisations before the travel. NGI Enrichers is not part of this discussion.

The NGI Enrichers consortium **will guide the NGI Enricher** and offer different alternatives to IPR protection, as part of the training and bootcamps.



7 EXPEDITION

Once signed the Sub-grantee agreement, agreed the IP rights with the host organisation and fulfilled the administrative requirements to enter the selected country, NGI Enrichers (Fellows) will be ready to start their expedition.

Beside carrying out the planned activities in the host organisations, NGI Enrichers (Fellows) will have the opportunity to join **additional activities** to increase synergies and collaboration with the NGI ecosystem. These activities will be implemented **before, during and after the expedition**.

7.1 DURING THE EXPEDITION

During their stay in North America, Fellows will have the opportunity to access the following activities:

- **Virtual on-demand mentoring programme** with mentors gathered through a mentorship programme to ensure that each Fellow is supported and followed up at each stage of the process;
- **Peer-to-Peer collaboration discussions** to facilitate the interaction between fellows selected through the Open ideas and Challenges call;
- And eventually other relevant activities.

Both the activities will be carried out through a dedicated **Community Management Platform**. The platform will also provide a virtual space to further the cross-pollination of ideas and exchange, build lasting relationships beyond the programme, and track the outputs such as the numbers of patents, solutions' TRL progress, and jobs created etc.

Before departure, Fellows will receive the details about his/her contact point (person) within the NGI Enrichers implementing consortium. In case Fellow encounters a specific problem during the stay that requires intervention of the NGI Enrichers Programme, the Fellow should contact this contact person.

The Fellow should provide three documents to the contact point (person) or upload them via the Community Management Platform:

- **The email from the host organisation** (responsible person) confirming the arrival of the Fellow to the host organisation.
- **Short mid-visit report** (see Annex 2).
- **Final report** (see Annex 2), maximum 5-10 pages, update of the mid-term visit report. Extracts from the summary report (mid-term and final) will be published on the NGI Enricher website. Public sections will be clearly marked in the report template. Other extracts will be used to improve the NGI Enrichers Fellowship programme and shared through the Community Management Platform (e.g., as success stories or lesson learnt).

7.2 AFTER THE EXPEDITION

Fellows will be invited to take part in the virtual **award ceremony**. During the ceremony, Fellows will pitch their projects and the outcomes to a jury and have the opportunity to win an award as "best NGI collaborative project". Additional information about the event will be provided in due time.

Note: Exact dates for the NGI Enrichers events, including the webinars and the award ceremony, will be communicated to Fellows well in advance.

8 PAYMENTS

NGI Enrichers consortium will provide financial support to Fellows through their organisations. Funding will cover the following expenses:



Monthly lumps sum living allowance : EUR 3.800 - for every full month of stay, according to the duration indicated in the application. If the stay period includes less than a month, the allowance will be discounted proportionally to the number of days effectively spent abroad. Swiss passport holders will get equivalent in Swiss Francs.



Travel and visa costs reimbursement (including cost of 'travel protection' insurance required for the visa, travel for training to attend the bootcamp, and one transatlantic travel): up to 3.000 euros upon cost justification. The travel reimbursement covers only economy class tickets (not the business, nor first class). The boarding passes (electronic form or paper form) must be provided as part of the expenses claim.

'Travel protection' Insurance costs will be reimbursed also for Fellows not needing a Visa.

TABLE 8: EXPENSES COVERED BY FUNDING

The payment to the Fellows will be divided into four different tranches for the lumps sum and one tranche for cost reimbursement, as follows:

25%

25% Of the lump sum fund will be released once the following requirements are met and the relevant cost claims are submitted:

- Having **signed the Sub-Grantee Funding Agreement** and the required documentation for Contracting provided.
- Having a **valid visa issued** to the United States or Canada
- **No Suspension of Entry**, e.g. as Immigrants and Non-immigrants of People Who Pose a Risk of Transmitting 2019 Novel Coronavirus and Other Appropriate Measures to address This Risk.

25%

25% Of the lump sum fund will be released once the following requirements are met:

- Having attended the pre-departure immersion bootcamp
- Arrival confirmation from the host

25%

25% Of the lump sum fund will be released once the following requirements are met:

- Submission of mid-term report (template provided by Programme)

25%

25% Of the lump sum fund will be released once the following requirements are met:

- Submission of the final report (template provided by Programme)
- Participation in the Award Ceremony (indicatively, at the end of 2023).

Payment is dependent on the successful completion of the Expedition.

TABLE 9: DISBURSMENT OF FUNDING

In addition, cost reimbursement will be done once as soon as all travel/visa justifications having been submitted.

The **overall amount of funding** each Enricher can receive (lump sum + visa/insurance reimbursement) is:

- Up to **EUR 14,400** for a **3-month Expedition**.
- Up to **EUR 25,800** for a **6-month Expedition**.

There will be maximum 30 days delays between submission of the document for the milestones, and the transfer of payment to the Fellow.

Note: In the event travelling to the US and Canada will still be proscribed or limited, NGI Enrichers will propose alternative expedition options.



9 ANNEXES

9.1 ANNEX 2 – REPORT TEMPLATES (INDICATIVE)

The short mid-term report and the final one will be structured as follow. Some extracts from both report will be public, while other will be confidential. This will be clearly indicated in the template provided to the fellow.

MID-TERM SHORT REPORT: 1-2 pages which will be published on the website:

- **Photo** of the fellow
- **Name of the fellow**, organisation/position
- **Profile:** Researcher or innovator
- **Host organisation**, lab, location, country, weblink to the host organisation or lab.
- **Dates of the expeditions**
- **Project title**
- **Topics and application domain:** to be selected from the list of topics and application domains
- **Media:**
 - One picture from open-source about the project/fellowship, or own picture
 - Link to 1-3 minute video recorded by the fellow with their phone or webcam (self-interview, or any other format), about the fellow's NGI Enrichers experience and the project (more guidance will be provided on).
- **Project summary** – including purpose and challenge: why such a project?
- **Key result**, starting from the expected results included in the application form
- **Impact of the fellowships** starting from the expected impact described in the application form. For instance:
 - Development/advancement of innovative technologies
 - Testing technologies (demo, pilot...)
 - Testing technologies on the market in the US/Canada
 - Sound Scientific Validation
 - Advancing standards
 - Strengthening research collaboration with the US/Canada



- Strengthening innovation collaboration with the US/Canada
- Building solid connections and partnerships in Europe and in the US/Canada
- Accelerated contacts/engagements with investors, VCs
- Accelerated contacts/engagements with R&D partners for future collaborations
- Accelerated business partnerships for developed technologies/solutions
- Reinforced integration of social sciences and humanities in the project
- Fundraising (proposals to public organisations) - indicate, in the US/Canada or Europe
- Expanding collaboration within the NGI community
- Technical integration of the products
- Mirrored fellowship from the host organisation to Europe
- Paper submission for further publication – indicate, only EU author(s), or jointly with the host organisation;
- Conference attendance with paper/poster/ proceedings
- Start-up establishment
- Career advancement
- New Job opportunities

CONFIDENTIAL PART: additional 5-10 pages

- **Host counterpart name**
- **Introduction:** Project's objectives and purpose
- **Report on activities** performed during the expedition including:
 - Summary of main achievements of the project
 - List of results with a brief explanation for each of them
 - Milestones achieved during the fellowship
- **Exploitation:** such as granting an EU and US patent to establish the IPR between the innovators, publishing the outcomes at a scientific conference, proposal submissions, business plan creation focusing on creating a new start-up and approaching VC fund and others.
- **Next steps / impact pathway:** what will be the next steps to further develop the project? How is the impact maximisation planned?
- **Conclusion**



