TETTRIs

Transforming European Taxonomy through Training, Research, and Innovations

Call for 3PP

Proposal Guidelines for Call for 3PP

TETTRIs

Funded by
the European Union

Application guidelines for the proposals for the Call for 3PP

The application guidelines for the proposals for the 3PP provide insight into the eligibility criteria, submission criteria and assessment procedure.

1. Eligibility, timelines and budget

1.1. Eligibility of the main applicant and project partners

The applicant for the 3PP can be a single applicant (Applicant) or a consortium of multiple applicants (formed by a Main Applicant and Partners). Please consider that the composition of the 3PP is encouraged to be a consortium of multiple expertise (i.e., 2-3 applicants). Within the consortium the Main Applicant is seen as the entity applying for the project. The project partners are seen as collaborating entities.

The call for 3PP is open to proposals from *institutions* (entities, associations or consortia) who are involved in research, education, conservation or innovation in *taxonomy* and other biodiversity-related topics. Any type of legal persons (e.g., museums, collections, research institutes, universities, SMEs, NGOs, public entities, etc.) are eligible without restriction or constraints as the main applicant or a partner. Involved parties in the project must have relevant expertise and experience in the proposed project area.

Organisations/beneficiaries in the TETTRIs project are not eligible parties in the call.

1.2. Eligible countries and territorial focus of implementation

- Member States of the European Union, including their outermost region described in Annex B of General Annexes of Horizon Europe Programme valid by the date of the call announcement (30th June 2023).
- Countries associated to Horizon Europe. Please see the Horizon Europe List of Participating Countries on the Portal information on the current list and on the position for Associated Countries valid by the date of the call announcement (1st of July 2023).
- Eligibility limitations for Hungary are set out by the Council Implementing Decision (EU) 2022/2506 of 15 December 2022 on measures for the protection of the Union budget against breaches of the principles of the rule of law in Hungary.[1]
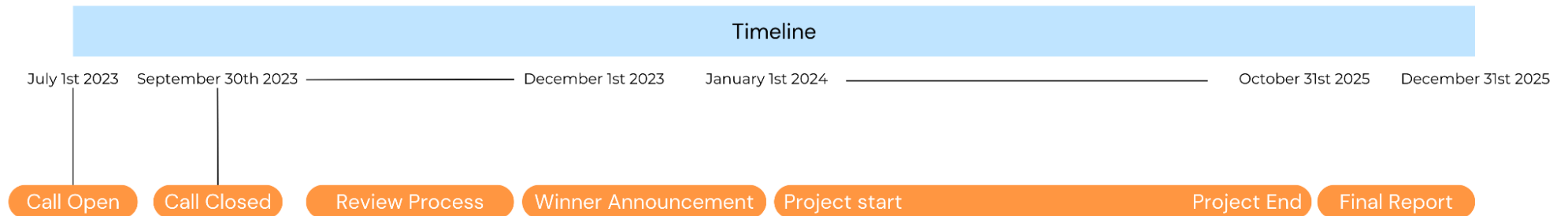
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[1] Individuals affiliated to entities falling under the public interest trusts or any entity maintained by such a public interest trust established on the basis of the Hungarian Act IX of 2021 are not eligible to apply to this call. See section 5 in the Guide for Applicants for more detail. Please indicate whether this applies to you.

1.3. 3PP timeline

The timelines for the 3PP are presented in the image below as well as the descriptive information.

- Open call: 30th June 2023 – 30th September 2023
- **Deadline: 30th September 2023, 23:59:59 CET**
- Review process: 2nd October – 1st December 2023.
- Announcement of grant recipients: December 2023.
- Earliest start date of 3PP: 1st January 2024.
- Latest end date for 3PP: 31st October 2025.
- The project can start and end any time between 1st January 2024 – 31st October 2025.
- The final report will be expected to be delivered within two months after the end of each project.

Timeline						
July 1st 2023	September 30th 2023	December 1st 2023	January 1st 2024		October 31st 2025	December 31st 2025
Call Open	Call Closed	Review Process	Winner Announcement	Project start ... Project End		Final Report

1.4. 3PP budget

The call for 3PP is granted through cascade funding from the TETTRIs project. The 3PP will be granted a 100% reimbursement of funding. The budget should fall between 50,000 euros and 200,000 euros.

The Main Applicant has to identify the budget distribution among participating partners. The budget has to be justified specifically as part of the project description, see below an overview of eligible and non-eligible costs.

Please note that there is NO overheads and that all eligible costs shall be put in EUROS.

Eligible cost categories	
Salaries	Those include staff Personal expenses (Salary costs) for project workers (researchers, technicians, curators, others).
Travel	**Travel tickets and other related costs, including meal allowance, accommodation and travel health insurance** related to the project activities for project workers (researchers, technicians, curators, others). Travelling: Use of private cars for field work will be eligible. Meal allowance per person per day: (per diem) There is no ceiling for meal allowance per person per day. The meal allowance calculation must be described in the project budget justification. The justification can be described easily using EU, national, international rules or standards, or it can be based on market research. It is eligible to use meal allowance for individuals, as well as for the group, in the form of direct shopping or meals at restaurants. Conference costs: If the dissemination of results of the 3PP is needed to be presented at the conference, it is possible to pay travel, meal allowance, accommodation and conference fees.
Equipment, rental and material costs	Equipment and material necessary for the project. The renting of laboratory space (laboratory bench fees), renting of training space (training room, car rental)
Other goods and services	External services, data management services, expenses for communication activities (phone), publication costs, lab consumables,, use of services supporting gender balance and inclusion (e.g., child-care services, assistance services, translation, and others necessary for the effective implementation of the project).
TETTRIs Consultants	
Travel and "per diems" allowance	Costs related to the TETTRIs consultants include travel allowance and "per diems" allowance for TETTRIs project consultants, trainers, trainees, stakeholders including citizen scientists, amateur taxonomists and others. For "per diems" rate please follow the calculations included here in the link above valid at the time of the launch of the call.
Non-eligible cost categories	
Projects generating profit	
Open access costs	
Overhead costs (electricity, water, cleaning and other building costs).	

2. Submission for proposals

2.1. Proposal form

The proposal should provide a clear justification for the proposed project, including its relevance to the TETTRIs project, its scientific merit, and potential impact. For any issues or questions you may have, please reach out to administrator.tettris@catalyze-group.com.

General information

1. **Title** of the proposal + **acronym**: The title should be concise and informative.

2. **Start of the project / End of the project**.
Earliest starting date of January 1st 2024, latest ending of October 31st 2025.
Minimum duration of 6 months, maximum duration of 22 months.

3. **Location of the project**
Country. Description of the local node, biodiversity hot-spot, protected area or taxonomy knowledge centre on which the project is focused. *max 150 words*

4. **Summary**
The summary should provide a brief overview of the proposed project, its objectives, methodology, and expected outcomes. *max 150 words*

5. **Major topic – please select:**
A project may touch on many different topics, but, **from the seven topics listed below**, applicants must select **ONLY ONE** as the **MAJOR** focus for their project.

   Topic 1. Species-level indexing of pollinator collections (Annex 1).

   Topic 2. Improving access to local taxon lists and taxon-related scientific data through pragmatic name-mapping workflows (Annex 2).

   Topic 3. The co-development of AI-based image recognition for European terrestrial molluscs (Annex 3)

   Topic 4. The co-development of AI-based sound recognition of European grasshoppers (Annex 4).

   Topic 5. Innovative molecular techniques for taxonomy: integrating genomic tools for the development of cost-efficient genetic markers for species identification and delimitation (Annex 5)

   Topic 6. The development of training programs for taxonomic research (Annex 6)

   Topic 7. Innovative cross-disciplinary projects focused on involvement of citizen scientists in monitoring biodiversity hotspots (Annex 7).

Please use this table to present answers to sections 1-5

Project information	
Title of the project	*Insert project name*
Project Acronym	*Insert project acronym*
Start date	*Insert start date*
Project duration	*Insert project duration*
End date	*Insert end date*

Location	Country. Description of the local node, biodiversity hotspot, protected area or taxonomy knowledge centre on which the project is focused. *max 150 words*
Project Summary	The summary should provide a brief overview of the proposed project, its objectives, methodology, and expected outcomes *max 150 words*
Topic selection	Please insert the selected topic and short argumentation *max 50 words*

6. Information about the main applicant and partners

The applicant describes information and background information of the Main Applicant and potential Partners.

Please use this table to present the information on the applicants

insert more where necessary

Main Applicant	
Name	Insert the name of the organization/institution
VAT number	Insert VAT number or other ID numbers
Location	Insert address, country
Website	Insert link to website (if applicable)
Legal Signatory	Insert the legal representative of the organization/institution
Principal Investigator/ Project Lead	Insert the person responsible for the project
Contact information	Insert the main email address and phone number of PI
Background	Background and experience of the principal investigator/ project lead *max 100 words*
Role in Project	Describe the contribution of the principal investigator/ project lead into the project *max 100 words*
Additional involvement	Insert the name, area of expertise, and involvement of the additional people involved in the project *max 200 words*
Partner 1	
Name	Insert the name of the organization/institution
VAT number	Insert VAT number or other ID numbers
Location	Insert address, country
Website	Insert link to website (if applicable)
Legal Signatory	Insert the legal representative of the organization/institution
Principal Investigator/ Project Lead	Insert the person responsible for the project
Contact information	Insert the main email address and phone number of PI
Background	Background and experience of the principal investigator/ project lead *max 100 words*
Role in Project	Describe the contribution of the principal investigator/ project lead into the project *max 100 words*
Additional involvement	Insert the name, area of expertise, and involvement of the additional people involved in the project *max 200 words*

Excellence

7. Objectives of the project

Provide a background description of the project idea and clear definitions of the project objectives. *max 300 words*

8. Approach

Provide a description on the proposed approach (concept and methodology) in the project to achieve the proposed objectives in the project. *max 500 words*

9. Constitution of the project team / consortium (if applicable)

A description of the constitution of the project team/consortium, how each partner/team member relates to the project objectives and how different disciplines come together to achieve those project objectives. Finally, describe how the project team/consortium aims to collaborate operationally . *max 500 words*

10. The collaborative approach with TETTRIs

Based on your topic selection, please provide a brief description of how you foresee the collaboration with the TETTRIs consultants. Specific instructions on the TETTRIs topics are provided in the Annex 1-7. *max 150 words*

Impact

11. Impact

Specify how the proposed project contributes to addressing the needs of local nodes, biodiversity hotspots, protected areas or the taxonomic knowledge. Please relate to the specific impact description in the TETTRIs Topics (Annex 1-7). *max 500 words*

The proposal should describe;
- The expected impact of the project, including any potential applications or benefits to the broader scientific community.
- The contribution to taxonomic knowledge and increasing taxonomic research capacity.
- A potential continuation beyond the lifetime of the project.
- An indication on the potential stakeholders, users, target-groups that are involved (if relevant). As reference, please have a look at examples of a stakeholder grid (power-interest matrix).

12. Dissemination and communication

Describe how the outcomes of the project will be disseminated and communicated, as well as the stakeholders, users, target-groups that will be reached. At the basic level, the project partners have to publish information about the project on its website in accordance with the EU publicity rules. *max 200 words*

Quality and efficiency of the implementation

13. Work plan

Description of the different tasks (3-7 tasks), their descriptions, activities, and the timeframe of the tasks. Please fill out the tables below and provide a Gantt Chart presenting the timelines of the tasks in the project. Outputs will be described following specific instructions described in Topics 1-7 (Annex 1-7).

In case of larger projects it is compulsory to include a Project Management task. Larger projects are seen as projects with >3 partners, budget >€100k and/or longer than 12 months.

Task X: *name Task (Task Lead)*   **Months of Task [X-X]**

Task description, including the relating project objectives and activities (maximum 3).

max 400 words

    ***Objective of task** ...*

Output of Task	*Describe the envisioned result of the task*

Task X: *name Task (Task Lead)*   **Months of Task [X-X]**

Task description, including the relating project objectives and activities (maximum 3).

max 400 words

    ***Objective of task** ...*

Output of task	*Describe the envisioned result of the task.*

Task X: *name Task (Task Lead)*   **Months of Task [X-X]**

Task description, including the relating project objectives and activities (maximum 3).

max 400 words

    ***Objective of task** ...*

    Task description

Output of Task	*Describe the envisioned result of the task*

14. Requested budget

The budget should fall between 50,000 euros and 200,000 euros.

The applicant has to identify the budget distribution among the main applicants and each partner if the proposer is a group of entities.

Please read the rules about the eligibility of budget costs in the part "Application guidelines for the proposals for the Call for 3PP".

15. Budget Justification

The applicant has to justify the project proposal and explain the costs of budget items per partner. One part of the evaluation of projects will be based on the cost-effectiveness of the budget and the justification is necessary. Without justification of the budget, evaluation of the project will not be possible and the project will be rejected.

Salaries	
Main Applicant	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Total cost	€

Travel	
Main Applicant	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Partner	Cost

Justification of costs	
Total cost	€

Equipment, rental and material costs

Main Applicant	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Total cost	€

Other goods and services

Main Applicant	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Partner	Cost
Justification of costs	
Total cost	€

TETTRIs Consultants

# consultant	Cost
Justification of costs	

# consultant	Cost
Justification of costs	
# consultant	Cost
Justification of costs	
Total cost	**€**

Ethics and Gender & Diversity

The proposal should include both an ethical checklist and a gender diversity checklist as for the submission of EU proposals. This should clearly address human (personal data), environment (safe handling of endangered flora and fauna) and artificial intelligence (ensure that evolved artificial intelligence tools are trustworthy and not based on prejudices against race, sex, or special needs) issues.

Ethical check

Please fill out the ethical issue table as produced by the European Commission as Annex 2, and be referred to the information in Annex 8

Gender & Diversity check

Please fill out the gender and diversity grid and be referred to the information in Annex 9

2.2.   Submission of proposal

The deadline for submitting proposals is 30th September 2023, 23:59:59 CEST using the online submission portal – Submit your Proposal

3. Qualification, Assessment and Evaluation process/criteria

The evaluation committee consists of two parties, the 3PP Administrator and the Community Implementation Board (CIB). The 3PP Administrator is specialised in organising and evaluating proposals, in monitoring and assessing the approved 3PP, and finally in disseminating their outcomes. TETTRIs envisages subcontracting those tasks to an external experienced service provider. The Community Implementation Board (CIB) of TETTRIs is composed of individuals whose expertise cover various societal sectors relevant to TETTRIs and have in-depth knowledge on the critical areas that the project is focusing on, such as taxonomic research, citizen science and biodiversity conservation.

The qualification, assessment and evaluation process for project proposals will be done in four steps.

> Level 1. Eligibility check
> Level 2. Basic quality assessment
> Level 3. Top-quality assessment
> Level 4. Ranking and selection

Level 1: Eligibility Check

The Evaluation Committee will:

- Verify if the applicant and partners meet the eligibility criteria outlined in the call for proposals
- Check if the proposal was submitted within the deadline and includes all required documents and information. If not, the applicant will be contacted in order to submit the missing details.
- Check if there is a selected main topic in the proposal. If not, the applicant will be contacted in order to specify the main topic.
- Check if the budget requested and timelines are within the boundaries described in the Call.

Level 2: Basic Quality Assessment

The Evaluation Committee will:

- Check if the applicant is experienced in the main selected topic of the project, e.g., the applicant or partners have a good track record for delivering the outputs:
    - *This will be checked based on the information provided in part 6 of the general information.*
- Check if the proposal meets the specific eligibility and quality criteria for the selected topic.
    - *This will be checked based on the information provided in the excellence, impact and implementation section.*
- Assess the collaborative approach; the cooperation with TETTRIs consultants, specialists or trainers is planned in the project in line with the specific descriptions of the Topics :
    - *This will be assessed based on the information provided in part 8 of the excellence section*
- Assess the described outcomes related to the expected outcomes as described in the Topics:
    - *This will be assessed based on the instructions in the topic descriptions, excellence and impact section*
- Assess the practical impact described in the proposal:
    - *This will be assessed based on the information provided in part 10 of the impact section*
- Assess the proposed stakeholder engagement towards the practical impact.

- o *This will be assessed based on the information provided in part 11 of the impact section*
- Check/conform to the ethics grid, gender equality and diversity.
  - o *This will be checked based on the information provided in the ethics section and part 12 of the impact section*

Level 3: Advanced Quality assessment

The Evaluation Committee will:

Evaluate the submitted proposals based upon their excellence, impact, quality and efficiency of implementation. Within each evaluation section the proposals will be scored based on the scoring rate below:

0 – The proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

1 – Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 – Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.

3 – Good. The proposal addresses the criterion well, but a number of shortcomings are present.

4 – Very Good. The proposal addresses the criterion very well, but a small number of shortcomings are present.

5 – Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

1. Excellence (30/100%)

The following aspects will be taken into account, to the extent that the proposed work and the work described in the work programme are aligned:

- Clarity of the project's objectives, and the extent to which the proposed work is ambitious, and goes beyond the state of the art.
- Sufficiency and competence of the collaborative approach, and how the collaboration with TETTRIs consultants will be hosted in an efficient manner.
- Soundness of the proposed methodology, including the underlying concepts, models, assumptions, appropriate consideration of the gender dimension in research and innovation content.

2. Impact (40/100%)

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme of the proposal, and the likely scale and significance of the results foreseen.
- Suitable approach to implement stakeholder engagement and to reach practical impact, considering the support of gender balance, inclusive activities and including citizen science.
- Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and communication plan.

3. Quality and efficiency of the implementation (30/100%)

The following aspects will be taken into account, to the extent that the proposed work corresponds to the description in the work programme:

- Quality and effectiveness of the work plan, and appropriateness of the effort assigned to work packages, and the resources overall.
- Capacity and role of each participant, and the extent to which the consortium as a whole brings together the necessary expertise.
- Efficient budget distribution considering the activities within the project and the expertise necessary for the implementation of actions.

Level 4: Ranking and Selection

Based on the scoring in the top-quality assessment the Evaluation Committee will:

- Select the highest-ranked project proposals for funding
- Consider the indicative division of the budget in the call for proposals.
- Create a final list of project proposals to be supported.

4. Proposal approval

4.1. Approval information

4.1.1. 3PP Contract

Applicants who are selected for funding will receive an email notification with the invite to sign the binding contract with CETAF. Once the 3PP Contract (the "Contract") has been signed, the Main Applicant will be responsible for managing the grant and distributing the funds among other project partners. In case of a consortium project, it is highly advised to set up a collaboration agreement.

4.1.2. 3PP Funding Schedule

The funding schedule will be as follows:

- 30% will be paid as a pre-finance funding no later than 10 days after the official project start.
- Additional finance funding will be made mid-way through the project, following a technical report and review meeting. This funding will be up to 45% of the requested budget.
- Final funding of 25% will be made following approval of the Final Technical and Financial Report.

The terms of 3PP Funding will be part of the 3PP Contract to be signed between the project partners and CETAF.

4.1.3. 3PP Reporting

The Main Applicant will be required to provide progress updates on the output of tasks based on progress and a final report at the end of the project. The Main Applicant should expect a minimum of two reports, reporting frequency is linked to the length of the project. The final report should include a summary of the project's outputs and clearly describe the outcomes and links to impact, as well as any challenges or obstacles they have encountered. This report should be supplemented by a financial report. Projects should also be evaluated to ensure that they meet the requirements of the cascading grant mechanism and contribute to the overall goals of the TETTRIs project. A reporting template will be provided at the time of reporting.

4.2. Projects communication and dissemination

4.2.1. Communication

Coordinated by Natural History Museum of Denmark, 3PP communication activities should aim to raise awareness about results, communicate progress, and educate a broad audience about the benefits of the TETTRIs innovations. They should also aim to establish the credibility of the expected novel methods and tools of the project methods within the general public, generating exposure and visibility for TETTRIs. Moreover, engaging with the general public and societal actors will increase awareness of taxonomy in general to a wide range of audiences.

4.2.2. Dissemination

Dissemination activities will be targeted toward researchers in taxonomy, non-professional taxonomists, users in need of taxonomic knowledge for their practice, and decision makers in policy, governance, spatial planning and various academic bodies. These parties are the crucial stakeholders to further develop, implement, and improve the TETTRIs innovations. Project partners should disseminate to these audiences through appropriate communication channels in collaboration with CETAF.