



D1.4 - Open call summary report 1

(Open Call 1, 2023)



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1 Executive Summary

IMPETUS is a Horizon Europe project which aims to enable and support citizen science initiatives. As part of that process, IMPETUS provides funding for citizen science initiatives through an open call. In this document, we set out a summary of the first open call, which ran from 10th January to 13th March 2023, with successful applicants joining the IMPETUS accelerator in June 2023.

This document may be of use to individuals and organisations looking to carry out their own open call, particularly in the areas of citizen science and sustainability, as well as policy makers, researchers and citizen science initiatives and administrators, who may obtain insight about the common issues and success factors in open calls.

The main findings of this document are as follows:

- We received 215 applications from a total of 37 countries, including 22 EU member states, 10 associated countries (or countries in the process of gaining associated status), one overseas territory, and four third countries.
- The most common country from which applications were received was Spain, with 38 applications. A significant number (31 applications) was also received from Italy.
- 24 applications were deemed ineligible with 191 selected for review. Of these 191, 107 were rejected prior to interview, while 84 were shortlisted for interview. Ultimately 42 of these projects were rejected upon interview, with a final 35 projects selected for the accelerator programme, and 7 projects selected for the reserve list.
- Applications were evenly balanced between the challenges, with 99 received for the 'Healthy Planet' challenge and 114 for the 'Cities for Life' challenge.
- During the application process we received 142 emails from applicants.
- We carried out two webinars, with a total of 159 attendees and a total of 510 subsequent views of webinar recordings on YouTube.



2 Introduction

IMPETUS is a Horizon Europe project which aims to enable and support citizen science initiatives. As part of that process, IMPETUS provides funding for citizen science initiatives through an open call. As a core element of these aims, IMPETUS aims to set-up and carry out a citizen science accelerator, involving a total of 125 citizen science initiatives (CSIs) over three years.

These CSIs are recruited through an open call process, consisting of three calls (one every year in 2023, 2024, and 2025), open to applicants from across the European Union, all overseas countries and territories linked to EU member states, and all third countries associated to or negotiating an association agreement with Horizon Europe (as of December 2022).

Two types of grants are offered: Kickstarting grants, supporting the setup or kickstart of new projects, offering €20,000; and Sustaining grants, supporting the further development and sustainability of existing projects, offering €10,000. Both project types were invited to apply in the same call, and successful projects to join the IMPETUS Accelerator, where they receive funding, support, training and mentoring, over the course of a six-month period.

This summary report covers the development and implementation of the first open call, which took place between 10th January and 13th March 2023. We provide details of the different stages of the call process (preparation, implementation, evaluation), and from the perspectives of different stakeholders, including applicants, consortium partners, the IMPETUS citizen panel, and external reviewers. We provide key statistics on the eligibility, review and evaluation outcomes of the applications, country of origin, inclusiveness, and focus of each application. We also describe the relationship with applicants through email correspondence and a series of webinars held to inform applicants and answer any queries. Finally, we identify lessons learned and summarise improvements that will be implemented in the second open call in 2024. All relevant documentation for the open call that is referenced in this document (guide for applicants, FAQ, short proposal template, declaration of honour) has been submitted as part of D1.1 in December 2022.



3 Summary of the call process

The IMPETUS open call is a competitive funding call intended to support European citizen science initiatives, with a particular focus on those initiatives addressing and providing data to measure indicators of the UN Sustainable Development Goals. Successful applicants gain access not only to funding, but also to an accelerator process designed to take initiatives through the process of designing and implementing citizen science activities, gathering data, and producing outputs, over the course of a six-month period. Each of the three open calls will follow the same structure, comprising five key phases: Preparation, Call, Eligibility checks, review, and interviews. Two following stages – Negotiation and Accelerator Launch – are part of the Accelerator process (and will thus be reported in D2.2). An overview of all phases is provided in Figure 1 below.

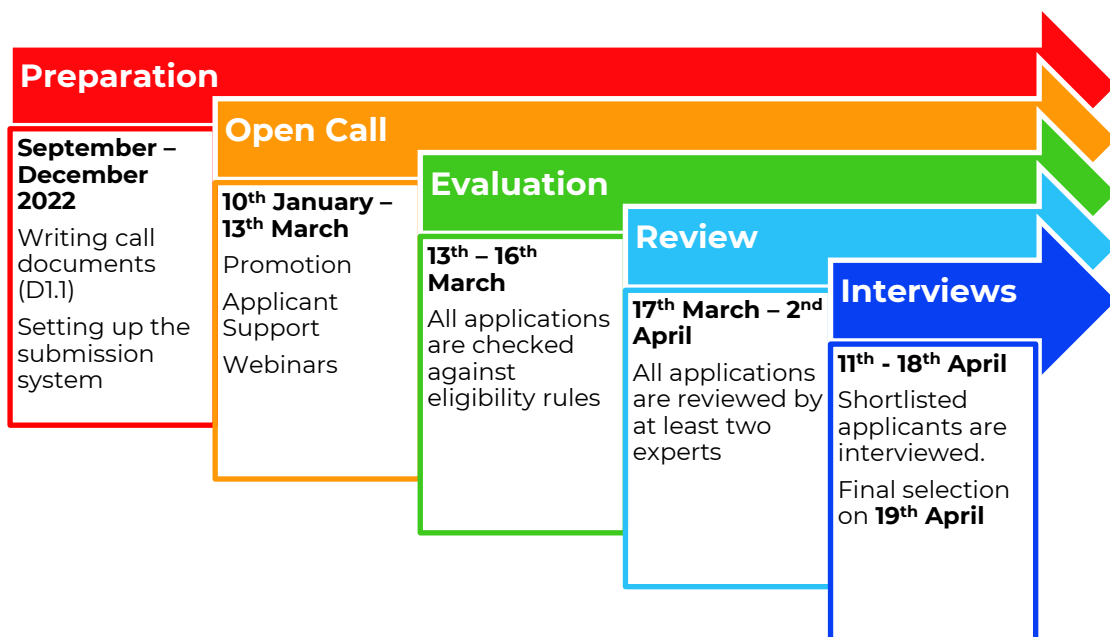


Figure 1: Summary and timeline of the first open call process

The open call process itself concludes at the end of the ‘Evaluation’ phase, where successful candidates are passed on to responsible consortium partners to proceed with onboarding: Zabala is in charge of due diligence and contracts; Science for Change is in charge of the Accelerator, including workplans and budgets. A more detailed timeline of these phases is provided in table 1 below:

Table 1: Key dates and milestones for the first IMPETUS open call

| Date | Milestone | Description |
|--------------------------------|-----------------------|---|
| 17 th December 2022 | Preparation completed | All call documents are prepared, the EasyChair system is set up and ready to receive applications |



| | | |
|--|------------------------------|---|
| 10 th January 2023 | Call opens | EasyChair open for applications. Call published on website and social media channels. |
| 24 th January 2023 | First webinar | Webinar 1 (recording) |
| 14 th February 2023 | Second webinar | Webinar 2 (recording) |
| 7 th /8 th March 2023 | Reviewer webinars | Webinars with external reviewers to explain the review process |
| 13 th March 2023 | Call closes | Open call / EasyChair platform closes for applications |
| 16 th March 2023 | Eligibility checks completed | All applications checked for eligibility. |
| 17 th March 2023 | Reviewing begins | Each application is reviewed by 3 reviewers |
| 2 nd April 2023 | Reviewing ends | Highest ranking applications are shortlisted for interview |
| 11 th – 18 th April 2023 | Interviews | Shortlisted applicants are interviewed by two members of the IMPETUS consortium |
| 19 th April 2023 | Final selection | IMPETUS consortium selects successful applicants |
| 20 th April 2023 | Notifications sent | IMPETUS informs applicants about the outcomes of the call; successful applicants handed over to Science for Change and Zabala for onboarding / contract negotiations. |

In the following sections, we will explain the individual phases of the open call process in more detail. Please note that some elements of the process were aligned between the open call for the accelerator (*Accelerator call*) and the open call for the European Union Prize for Citizen Science (*Prize call*). When we reference the *Open call* or *Call*, this refers to the Accelerator call only. Where both parts of the call are meant, this will be mentioned explicitly.

3.1 Preparation

Before we could begin to define the details of the open call, the IMPETUS consortium needed to agree a shared definition of citizen science. This was important to ensure that the consortium shared the same vision and would therefore agree on assessment criteria and the types of projects to join the Accelerator and be awarded the European Union Prize for Citizen Science later on. The definition was developed over several weeks and agreed in November 2022.



This was followed by the definition of the challenges for the open call. As per IMPETUS' GA, one challenge, seeking CSIs that would contribute to the Sustainable Development Goals and European Green Deal (*Consortium challenge*), was defined by the consortium; a second challenge was defined by the IMPETUS citizen panel (*Panel challenge*).

The Consortium challenge was meant to focus on SDGs 6 (clean water and sanitation), 3 (good health and well-being) and 15 (life on land). This was aligned with The Green Deal target *Fresh air, clean water, healthy soil and biodiversity*. In addition, SDGs 4 (quality education), 5 (gender equality), 10 (reduced inequalities), 11 (sustainable cities and communities) and 13 (climate action) were meant to feature across *all* open calls. This was broadly aligned with the Green Deal target *Future-proof jobs and skills training for the transition*.

The challenge itself was collaboratively developed by multiple partners. T6 provided an initial overview of SDGs and indicators as defined during the project development, out of which KCL created a first draft for the challenge. This was subsequently discussed in consortium meetings, and finally refined into the challenge text *Citizen Science for a Healthy Planet* (see D1.1).

In order to create the Citizen panel challenge, IMPETUS recruited a panel of citizen science practitioners. The panel was recruited through a call published on the IMPETUS website, and a simple application form asking candidates to describe their relationship to citizen science, and outlining diversity criteria. Out of this, the ten most suitable candidates were selected by KCL and AE since the panel was meant to play a role in both the Accelerator and the Prize call.

The panel first came together in November 2022, met twice on a Teams call, and co-created the challenge text during and in-between meetings. The first meeting was focused on introductions and an initial brainstorm; the second meeting was focused on finalising the topic and creating a full draft of the text. The challenge text was then finalised by the IMPETUS consortium, to ensure the language was aligned with other call documents, and approved by the panel under the title *Cities for Life* (see D1.1).

Alongside the creation of the challenges, KCL created three key documents: the Guide for Applicants, an FAQ, and an application form (see all in D1.1). These were largely based on documents used in the ACTION project (<https://actionproject.eu/apply-2020/>), and refined to suite the different focus and process of IMPETUS.

Lastly, KCL prepared the application submission platform EasyChair. This included questions applicants needed to answer about their proposed project, the type of grant and challenge they applied for, as well as an initial impact assessment. Questions for the latter were aligned with WP5 to fit allow for later use in the projects' impact assessment.



3.2 Implementation

The open call was launched on 10th March. The entire call period was closely aligned between the Accelerator and Prize calls, to allow for maximum synergies. While we believe that this was beneficial in terms of reach, it was also a challenge in terms of clarity of communication. The Accelerator call was hosted on the IMPETUS website, while information on the Prize was available through the Ars Electronica portal. Details about the dissemination of both open calls will be provided in the dissemination section of the technical report.

3.2.1 Call information

The main source of information potential applicants had access to, was the IMPETUS website, with a dedicated page on the open call (<https://impetus4cs.eu/opencall/>). The website serves as the entry point for the call and offers all the documentation and information that an applicant needs to be aware of to apply, along with links to upcoming webinars, recordings of previous webinars, and the application platform EasyChair.

Applicants were strongly advised to read the Guide for Applicants and FAQ documents prior to beginning their application. These documents contained all the necessary information to submit a successful application to the open call, including the call aims, challenges, eligibility requirements, key dates, and template documents that must be submitted, as well as the review and notification processes and selection criteria.

In order to apply, applicants were asked to complete a short proposal document of a maximum of 4 pages, by filling in an application form provided for download from the IMPETUS website as well as EasyChair. The application form consisted of 22 questions, including a brief budget breakdown and an explanation of key costs. Questions were divided into four sections, according to the main criteria expected in a successful application: **Idea, Implementation, Team & Community, and Impact**

3.2.2 Applicant support

On launching the call, we also launched an email helpline (opencall@impetus4cs.eu) to field questions from potential applicants. This helpline was managed by KCL and aimed to respond to applicants within 2 working days wherever possible, with some longer turnaround times for questions with some degree of uncertainty or which required input from other consortium partners. During the application period, we received a total of 142 email queries from prospective applicants. These emails largely comprised two broad categories - questions about eligibility, and clarification about the topical focus, i.e. which challenge and grant type project ideas would fit into.

To assist applicants with the application process, answer questions and clarify the aims and objectives of the IMPETUS accelerator, we ran two webinars for potential applicants, one for each month that the call was open. These took place on Microsoft Teams, and were recorded and subsequently published on YouTube and the IMPETUS website. The first webinar took place on the 24th January, the second on 14th February. Each webinar lasted for approximately one and a half hours, and consisted of a



presentation explaining the application and evaluation process for both the Accelerator and Prize call, followed by plenty of time for questions.

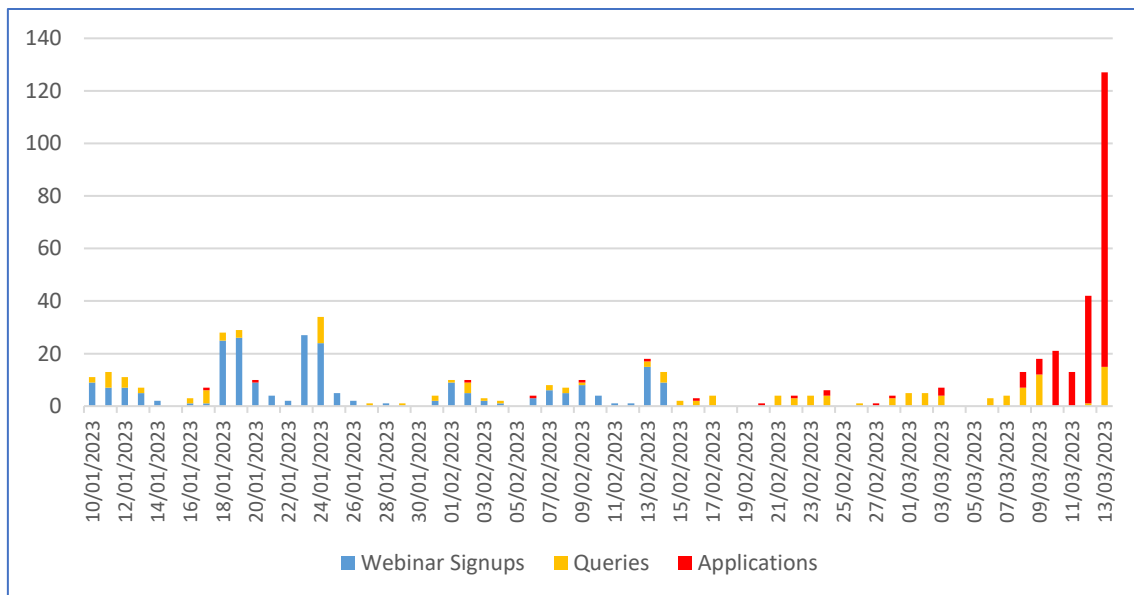
Registration for both webinars was made available with the launch of the open call on 10th January. Total registration counts, attendance figures and view counts for each webinar and video can be seen in table 5 below. Note that webinars used the same presentation and were all very similar, with the only difference in the questions from applicants asked throughout.

Table 2: Registration, attendance and views of webinars

| Date | Registration | Attendance | Views (as of 13 th July) |
|---------------------------|--------------|------------|-------------------------------------|
| 24 th January | 86 | 94 (110%) | 363 |
| 14 th February | 62 | 65 (105%) | 147 |
| Total | 148 | 159 | 510 |

Overall, email webinar signups were focused at the beginning of the project, queries were dotted across the entire call period, and applications received were highly focused at the very end; especially the last day – as can be seen in Figure 2.

Figure 2: Timeline of webinar registrations, email queries, and applications received



The open call closed on 13th March. While it was originally planned to close the call at noon CET, we added a grace period of 12 hours (until midnight), to allow more applicants to submit.



3.3 Eligibility checks

Once the call was closed, KCL conducted detailed eligibility checks for all received applications. Eligibility criteria were identical for both challenges, but slightly different for both types of grants, as shown in Table 3. All eligibility criteria had been listed in the guide for applicants and discussed in the open call webinars.

Table 3: Eligibility criteria by grant type

| Kickstarting | Sustaining |
|---|---|
| <ol style="list-style-type: none"> 1. Organisation + project location (in ERA or other country listed in guide for applicants; aligned with Prize call) 2. Declaration of Honour (signed) 3. Application form (max 4 pages, no changes to form) 4. Proposal to implement citizen science (aligned with IMPETUS definition) 5. Only one application per applicant | |
| <ol style="list-style-type: none"> 6. Project status (not started / started, but not implemented) | Project status (Actively engaging with a citizen science community collecting / analysing data or completing other project tasks) |

A total of 189 applications passed the eligibility checks. Detailed results and overall statistics are provided in section 4.1. All applications that passed eligibility checks proceeded to review.

3.4 Reviews

Reviews were conducted by both IMPETUS consortium members and external experts. Overall, 26 reviewers (11 internal, 5 external) conducted a total of 573 reviews. All reviews were conducted between 17th March and 2nd April. Reviewers were selected from a pool of experts associated to IMPETUS and its consortium partners. They were invited into to review at the end of 2022, and received training a week before reviews commenced.

Every application was assigned reviewers that between them covered:

1. Topical expertise
2. Expertise in citizen science and engagement
3. Expertise in IMPETUS

Most applications were reviewed by two reviewers who shared this expertise between them. Reviewers were assigned to projects based on the abstracts provided on application forms.

To complete reviews, reviewers were asked to fill in a score page within the EasyChair system, divided into four sections, with scores and comments for the idea, implementation, team and community, and impact – aligned with the four sections of the application form. Each section was to be evaluated on a scale of excellent (5), good (4), fair (3), poor (2) and very poor (1).



To support this process, each reviewer was given a document outlining the criteria, which broke down the expectations for each field and area for each point on the scale. There was no requirement that any given score be influenced by another - i.e., an application could in theory receive a 5 for idea, and a 1 for implementation. Reviewers were asked to clearly outline their reasoning and comments for each field and reviews were checked for consistency between scores and comments. We also attempted to rebalance review scores, so as to adjust scores of harsh and generous reviewers. However, this turned out to not have any effect on the final results, and has thus been dropped to simplify the process. All comments and an overall score were provided as feedback to applicants at the end of the evaluation phase, but individual scores for fields were not.

Detailed statistics about the outcome of the reviews is provided in section 4.2. All applicants were informed about the preliminary outcome of their application (rejected as ineligible, rejected after review – with feedback, shortlisted for interview) on 5th April. When receiving their reviews, applicants were given overall comments for each of the four areas, along with an overall score out of 5, averaged from all reviews their application received.

Upon completion of the reviews, all reviewers were asked to fill in a feedback form about the process. The outcomes of this will be used to revise the process for the next open call.

3.5 Interviews

IMPETUS conducted a total of 84 interviews over six days, between 11th – 18th April 2023. Shortlisted applicants received an invitation to interview by email, outlining the process:

The interview will consist of a short presentation by you of your proposed project, followed by questions from a panel. The presentation can be up to five minutes long, and should cover your idea, implementation plan, team, and anticipated impact. You may bring slides, but you do not have to. The Q&A will be 15 minutes, with a panel of two members of the IMPETUS team.

All interviewers were members of the IMPETUS consortium, specifically from KCL (chairing on all interviews), Nesta, T6, and Science for Change. All interviewers were provided with the application form and reviews for the specific project. Additionally, reviewers were given a set of example questions that could be used during the interview process if necessary. Interviewers recorded their notes and thoughts about each project, and their personal preference for them to proceed into the Accelerator (Yes/Maybe/No) in an excel table. Based on this information, the IMPETUS consortium made a final decision about projects to join the accelerator in a call on 19th April. Applicants were informed of the outcome on 20th April. At this point, successful applicants were passed on to partners SfC and Zabala, to proceed with contract negotiation and onboarding into the accelerator; these processes will be covered by D2.2.



4 Call results

In this section, we will outline the outcomes and statistics of the process described in section 3.

4.1 Eligibility

During the eligibility checks, applications were checked for adherence to the criteria of the call as listed in Table 3: Eligibility criteria by grant type.

Only 24 projects (11%) of applications were deemed ineligible at this stage, which was significantly lower than our initial expectation. For example, in the prior ACTION project, on which the open call process was based, we had experienced an ineligibility rate of 25%. The primary reason for this is likely the system changes implemented on the submission platform EasyChair, which prevented overlength applications from being submitted. Overlength had been the primary reason for ineligibility in past open calls.

The reasons for applications being deemed ineligible in the first IMPETUS open call can be seen in Table 4 below. Note that while 24 applications were deemed ineligible, applications may have had multiple issues; they were only counted under the first issue identified. For example, if an application had both been submitted from an ineligible country, and made changes to the application form, it would only be counted under the former, as further checks would not have been carried out.

Table 4: Summary of eligibility issues for applications in the first open call

| Reason for ineligibility | # of applications | % |
|--|--------------------------|----------|
| Ineligible country | 6 | 25,00 |
| Changes made to application form | 4 | 16,67 |
| Not meeting citizen science definition | 3 | 12,50 |
| Ineligible for grant type | 3 | 12,50 |
| Declaration of Honour not signed | 3 | 12,50 |
| Duplicate | 2 | 8,33 |
| Withdrawn | 2 | 8,33 |
| Multiple submissions by applicant | 1 | 4,17 |

The most common reason for ineligibility was the applications being submitted from ineligible countries. We received five applications from Peru, Bolivia, Colombia and Indonesia; and one application from a German institution seeking to implement a



project outside the ERA. Four applications were submitted in invalid forms, either adapting the IMPETUS application template (most commonly by removing questions to gain space for text) or disregarding it altogether. Three applications were submitted for incorrect grant types, all of which were established projects that had applied for kickstarting grants. The consortium discussed whether such applications could potentially be reassigned to the correct grant type. However, this idea was discarded, since the projects would have to be delivered with only half the budget, and this would have required substantial changes to the projects' scope. Three further applications sought funding to design and launch products and had no citizen science or research-based aims. One applicant submitted two proposals, in which case only the first submission proceeded to review.

4.2 Reviews

A total of 191 eligible applications proceeded to review. Most of these applications received three reviews from a pool of 26 reviewers. Each IMPETUS partner (with the exception of Ars Electronica, who ran the review process for *Prize* applications at the same time) contributed to the reviews.

Each reviewer assigned up to five points for each of four application areas (max of 20 points). Applicants needed to reach a minimum of 12 points on average, and must not have been scored below 3 in any one area by any one reviewer, to qualify for an interview. On average, projects reached 14.23 points, with one notable exception – Sustaining projects in the Cities for Life challenge scored an average of 11.86.

Consequently, while applications for sustaining grants were received in both challenges, all five sustaining grants were awarded to projects from the *Healthy Planet* challenge. We assume that this is because projects in environmental monitoring and related fields are more established in the citizen science community, and were therefore further advanced, making them more suitable to the Sustaining grants.

Table 5: Average points reached by challenge and grant type

| | Kickstarting | Sustaining |
|-----------------|---------------------|-------------------|
| Cities for Life | 14.48 | 11.86 |
| Healthy Planet | 14.12 | 14.65 |

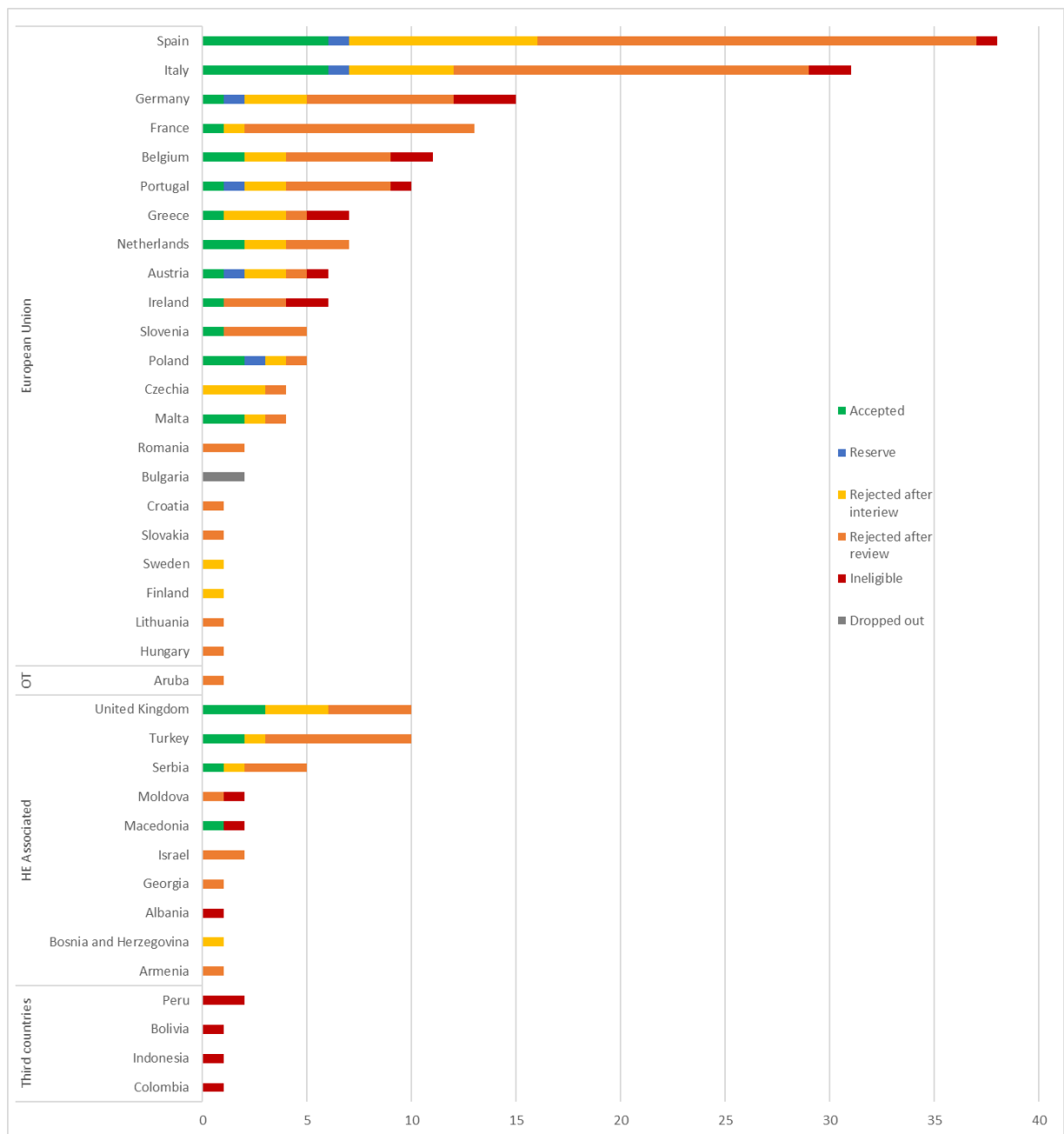
4.3 Final selection & diversity

For the first open call, we received applications from a total of 37 countries, of which 22 were EU member states, 10 associated countries or in the process of association, one overseas territory, and four ineligible third countries. These are shown in Figure 2 below. In terms of the number of applications received, 85 were received from EU member states, 26 were received from associated countries and 4 were received from ineligible (third) countries.



We note that 40% of submission were received from organisations based in countries where the IMPETUS consortium partners are based (Spain, Italy, Austria, UK). However, we believe that this is primarily due to these countries having large, existing citizen science communities that were activated through our call. We were particularly pleased with our reach beyond the 'usual suspects', including 10 applications from Turkey, and a total of 34 applications from 15 countries across South-Eastern Europe. Overall, we are proud of the geographical reach we have achieved in our first open call, which has already vastly exceeded our overall KPI of 20 countries.

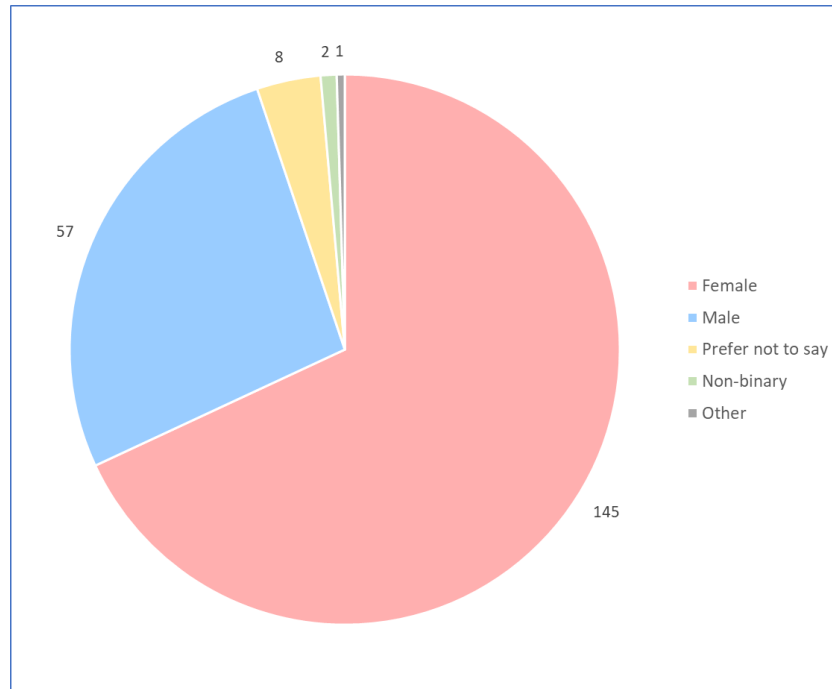
Figure 3: Applications and selection outcome by country





We were particularly pleased by the gender distribution among applicants: 68% of projects leads identified as female. This also translated into the final selection, where 73% of successful projects are led by women. Again, we have achieved and surpassed our KPI (50% non-male led projects) with ease.

Figure 4: Applications by lead gender

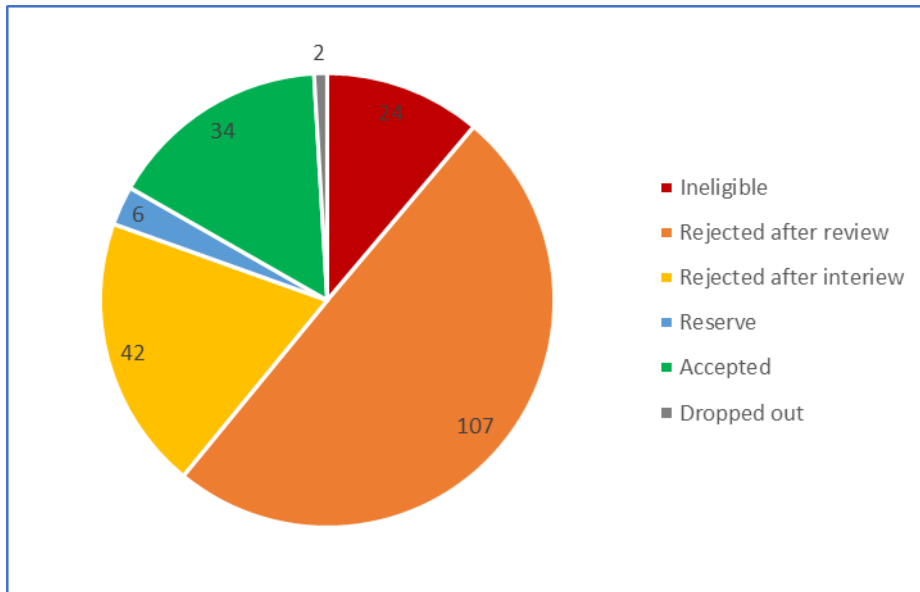


Lastly, while we did not collect structured data on target groups of the projects, our review of the selected projects has shown that 23 of 34 projects (68%) engage on vulnerable groups. The primary groups involved in these projects are minors (14 projects), participants with disabilities (6 projects), patients (4 projects), and refugees (3 projects).

4.4 Evaluation outcomes

For the first IMPETUS open call, we received 215 applications, landing slightly below the target of 300 applications set out in the grant agreement. However, the quality of the applications was much higher than expected, enabling us to select the target number of CSIs for this call (35 – 30 kickstarting and 5 sustaining grants). A breakdown of evaluation outcomes can be seen in Figure 5 below.

Figure 5: Overall application outcomes



The number of applications was well balanced between both challenges, with a slight preference for the *Cities for Life* challenge. An overview of applications and selected projects, split by challenges and grant type, is provided in Table 6.

Table 6: Applications and selected projects by challenge and grant type

| | Kickstarting | Sustaining |
|-----------------|---------------------|-------------------|
| Cities for Life | 19/101 | 0/13 |
| Healthy Planet | 10/70 | 5/29 |

Table 7 summarises the types of applicants selected in the first OC:

Table 7: Types of applicants in selected projects

| Type of applicant | # | % |
|---------------------------------------|----------|----------|
| Mix of legal entities and individuals | 1 | 2.94 |
| Individual Legal Entity | 27 | 79.41 |
| Consortium of legal entities | 4 | 11.76 |
| Individual | 1 | 2.94 |
| Group of individuals | 1 | 2.94 |



5 Lessons learned

Overall, we consider the first open call very successful, having achieved nearly all of our KPIs already. The call itself, the documentation, and the review and selection process has worked well and received good feedback from both external and internal reviewers. While a detailed analysis of all feedback is still to be conducted, we can summarise some initial learnings that we will take forward into the second and third open call:

1. Provide more clarity to applicants about eligibility and *suitability* of projects to the different challenges and grant types. While there was no broader issue around this, we have received many queries from applicants about this, indicating that we could have communicated clearer to start with.
2. Establish an even closer link between the *Accelerator* and *Prize* call. While this has worked well in principle, our impression is that the two parts of the call were not necessarily perceived as belonging together, and both being run by IMPETUS.
3. Provide more detailed guidance on the use of EasyChair, and ensure applicants are aware that they should receive a confirmation email after submission.
4. Better align the application form questions with review criteria. While this had been done in the first call already, we found that in practice, most projects do not answer the questions we asked the way we expected; we will realign this based on the experience we now have.
5. Collect more and more structured data about applicants. We found that more detailed information about the research area, and applicant organisations (especially in the case of consortia) would have made both reviews, and the progression to negotiation and contracts, easier. This will also allow us to better understand the applicants profile and closer align the results of the Accelerator and Prize calls.