

Work Plan 2026-2027
Guidelines for the selection procedure
Version XXX

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1. Introduction

This document aims to assist Work Package Leaders (WPL), Project Leaders (PLs) and Task Force Leaders (TFLs) in the selection of contributions provided by the Beneficiaries, i.e. the appropriate competencies and resources to EUROfusion's Work Plan 2026-2027. In order to plan the activities for the abovementioned period, the Programme Management Unit (PMU) has launched several calls for participation in Work Package (WP) activities. After the call's deadline, the Project Leaders / Task Force Leaders will evaluate all submitted contributions by Beneficiaries following the procedure described in this document.

2. Selection procedure

2.1 Scoring

After the call deadline, the PLs / TFLs will remotely evaluate each submitted proposal using the Selection template annexed to the Call and according to the evaluation criteria listed in section 2.3 of this document. While PLs / TFLs are encouraged to use a scoring system from 0 to 5, in cases where the proposed scale and the abovementioned eligibility criteria are not fit for purpose, a different scale defined by the PLs / TFLs may also be used, so long as it is reported to the Programme Management Unit (PMU) in advance.

Proposed scoring system:

0 – 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.

Based on the scores, the PLs/TFLs will then select the contributions for the Work Plan 2026-2027. The PMU will assist the PLs/TFLs, at every step of the process, if needed.

2.3 Selection criteria

All submitted proposals will be assessed against the following criteria, if indicated:

1. Experience and technical competence of proposed human resources in the field.
 - a. Quality and relevant experience of the individual participants.
 - b. Quality of the team as a whole (including complementarity and balance).
 - c. Extent to which their input would contribute to advance the work in the WP.
 - d. Adequacy of the proposed human effort (in person-month).

2. Experience and technical competence of the Beneficiary and the proposed industrial subcontractors in the field of the activity.
 - a. Extent to which the proposed activities for industrial subcontracting would contribute to advance the work in the WP.
 - b. Adequacy of the proposed budget for the period 2026-2027.
 - c. Technical competence and relevant experience of the proposed industrial subcontractors in the field of the activity.
 - d. Competence of the technical expert(s) foreseen to follow-up the tender procedure and the task.

3. Relevance of the equipment and other goods and services proposed by the Beneficiary for the successful completion of the WP's deliverables.
 - a. Extent to which the proposed equipment and other goods and services contribute to achieve the WP deliverables.
 - b. Adequacy of the proposed budget and procurement spending profile for the period 2026-2027.
 - c. Experience of the Beneficiary in the associated field to provide technical support to the procurement of equipment and other goods and services.

4. Relevance and availability of the proposed facilities for the successful completion of the WP's deliverables.
 - a. Type and characteristics of the proposed facilities to meet the WP's objectives.
 - b. Adequacy of the proposed availability of the facility for the period 2026-2027.
 - c. Extent to which their capabilities contribute to achieve the deliverables in the WP.

5. Relevance of the proposed facility investment for the successful completion of WP deliverables.
 - a. Extent to which the type, characteristics and objectives of the proposed facility investment contributes to achieve the WP deliverables.
 - b. Adequacy of the proposed timeline to build or upgrade the facility.

- c. Adequacy of the proposed budget and the investment profile for the facility investment.

2.4 Clarifications and / negotiation with Beneficiaries

During the evaluation period, the PLs/TFLs may also contact the representatives of the Beneficiaries for further clarification and for negotiation on the activities and the size of the contribution, if needed. Upon completion of the assessment, the PLs / TFLs will make a recommendation to the PMU including a justification for the selection of the Beneficiaries' resources to execute the tasks within each WP, as well as the financial resources required for this purpose.

3. Access to proposals and reporting requirements

The PMU will ensure that the PLs / TFLs have access to all proposals right after the Call deadline. The Selection template (xlsx. Format) annexed to the Call comprises five sections, each of which require a score and a well-founded justification. The bullet points listed under each section are there to help PLs / TFLs develop their justification / explanation for their selection. After the selection is finalized, the filled Selection template including the scores and justifications should be saved under the following folder in IDM following the naming convention of <WPXXX-Document title>. The associated financial information, however, should be entered into by the PLs/TFLs in the IMS system under the Indicative Resources section in the form of a two-year indicative resource allocation. There is no need to send hard copies to the PMU.

4. Communication to Beneficiaries

Following the selection of the proposals the allocation of the financial resources will be communicated to all Beneficiaries at the first General Assembly.