



Establishing the European Geological
Surveys Research Area to deliver a
Geological Service for Europe

Deliverable

EVALUATION DOCUMENTS

Authors and affiliation:
Lisbeth Flindt Jørgensen

[GEUS]

E-mail of lead author:
lfj@geus.dk

Version: 28-04-2017

This report is part of a project that has received funding by the European Union's Horizon 2020 research and innovation programme under grant agreement number 731166.



Deliverable Data		
Deliverable number	D3.2	
Dissemination level	Public	
Deliverable name	Evaluation Documents	
Work package	WP3, Evaluation and Proposal Selection	
Lead WP/Deliverable beneficiary	GEUS	
Deliverable status		
Submitted (Author(s))	06/04/2017	Lisbeth Flindt Jørgensen
Verified (WP leader)	28/04/2017	Lisbeth Flindt Jørgensen
Approved (Coordinator)	28/04/2017	Yvonne Schavemaker

GENERAL INTRODUCTION

Deliverable 3.2 represent the evaluation documents, these include:

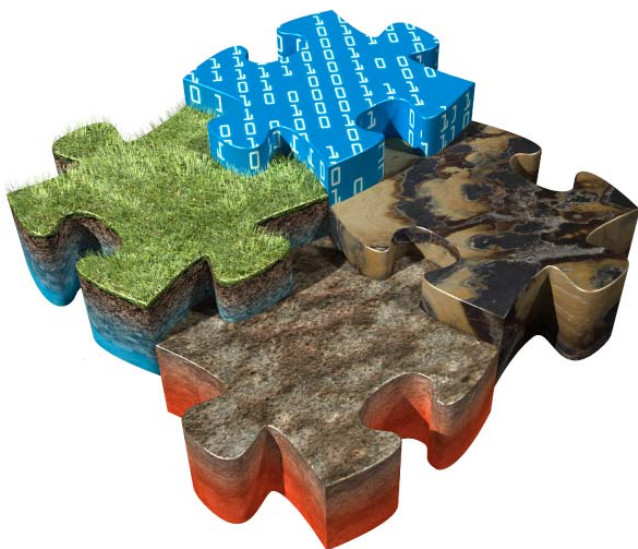
- Eligibility checklist and evaluation reporting forms for both evaluation stages. The Stage One evaluation is considered an assessment of Project ideas, and therefore the evaluation reporting form for Stage One corresponds to the “Assessment Sheet Stage One” in below table. For Stage Two the evaluation reporting form corresponds to Form 8B Evaluation Form
- Guidelines for External Reviewers of full proposals. Reviewers will be clearly informed on the expectations of the Executive Board and instructed by NWO. The guidelines correspond to Joint Call Document 8, delivered in D3.1, the evaluation form and an additional introductory session to the final evaluation and ranking held at the Expert Panel Meeting. Furthermore, the Guidance for evaluators of Horizon 2020 proposals (EC doc, September 2014) will be shared with the Expert Panel members.
- Terms of Reference for the Stakeholder council
- Qualification profile of expert panel members, corresponds to Form 8D
- Non-disclosure agreement (for external evaluators), corresponds to Form 8A

For the sake of completeness, Form 8C Payment to Independent Experts is included in this deliverable as well. This deliverable report of the evaluation documents for the GeoERA call result in a combination of the following documents:

<i>GeoERA Co-Fund action</i>	
	Terms of Reference Stakeholder Council
<i>Joint Call Phase</i>	
<i>Stage One - Call for Project Ideas</i>	
	Eligibility Checklist Stage One
	Assessment Sheet Stage One
<i>Stage Two - Call for Project Proposals</i>	
Form 8A	Code of conduct and declaration
Form 8B	Evaluation form
Form 8C	Payment to independent experts
Form 8D	Qualification Profile of Expert Panel members

TABLE OF CONTENTS

1. TERMS OF REFERENCE STAKEHOLDER COUNCIL
2. ELIGIBILITY CHECKLIST STAGE ONE
3. ASSESSMENT SHEET STAGE ONE
4. FORM 8A CODE OF CONDUCT AND DECLARATION
5. FROM 8B EVALUATION REPORTING FORM
6. FORM 8C PAYMENT TO INDEPENDENT EXPERTS
7. FORM 8D QUALIFICATION PROFILE OF EXPERT PANEL MEMBERS



GEOERA

**Establishing the European
Geological Surveys Research
Area to deliver a Geological
Service for Europe**

Stakeholder Council

Terms of Reference

Grant id. 731166

Date: December 5th 2016

1. This document

This document presents the terms of reference for the Stakeholder council – a body of the GeoERA organizational structure. The document describes the terms for selecting members of the stakeholder council, as well as the tasks they are asked to carry out and the conditions for the work.

The overall reference is the GeoERA Grant Agreement: Grant id. 731166.

2. GeoERA aim and objectives

More than 45 national and regional Geological Survey Organizations (GSOs) from more than 30 European countries have joined forces to develop the ERA-NET COFUND action *“Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe (GeoERA)”*. The overall goal of GeoERA is to integrate the participants’ information and knowledge on subsurface energy, water and raw materials resources to support sustainable use of the subsurface in addressing Europe’s grand challenges. Through a joint call for transnational projects, the GeoERA consortium will address the development of:

- Interoperable, pan-European data and information services on the distribution of geo-energy, groundwater and raw material resources and harmonized methods to assess these;
- Common assessment frameworks and methodologies supporting better understanding and management of the water-energy-raw materials nexus and potential impacts and risk of subsurface use;
- Knowledge and services aimed at European, national and regional policy makers, industry and other stakeholders.

The joint call covers four themes (see the table below) and has a budget of 30.3 M€, of which 10 M€ is provided by EC and the remainder is provided by the GeoERA participants as in-kind contribution to the funded transnational projects.

Themes and budget for the GeoERA call	
<i>Geo-Energy</i>	<i>10.3 M€</i>
<i>Groundwater</i>	<i>7.7 M€</i>
<i>Raw Materials</i>	<i>8.4 M€</i>
<i>Information Platform</i>	<i>3.9 M€</i>

Table 1: The four themes and the allocated budget for each of these in the GeoERA call. The Information Platform theme is cross-cutting and will integrate data and information from the other three themes

Through this joint effort, GeoERA will:

- Integrate national and regional research resources;
- Develop, improve and optimize harmonized pan-European coverage of geological data and information at a scale and resolution that is common to national and regional geological mapping programs;
- Contribute to the establishment of a common European Knowledge Base and to the joint provision of a Geological Service for Europe.

The Geological Knowledge Base will provide European stakeholders with access to objective and seamless data, information, knowledge and expertise on subsurface resources and their sustainable use and management.

3. Call procedure and implementation of GeoERA

The joint call will be conducted through a two-stage process, Stage 1 and 2, see figure 1 and table 2.

Stage 1 is a “Call for Ideas” which is open to all - participants, stakeholders, academia and the public. Any organization or person is invited to submit ideas for projects within each of the four themes, as well as cross-cutting issues across the themes, within the ***frame of the Theme Descriptions*** listed in the Annex. The Project Idea proposals received in call Stage 1 will provide input to the definition of call topics within the call text for each of the four themes in Stage 2.

Stage 2 is a “Call for project proposals”. This stage is open only to Beneficiaries of the GeoERA Grant Agreement. Third parties could join on own costs, but cannot become a Beneficiary of the EC-cofund.

A main task of the Stakeholder councils is to review and give advice on the draft Stage 2 call text (see Figure 1).

Provisional Time Schedule		
Stage	Description	Date (mm/year)
	Pre-Announcement	01/2017
Stage 1 Project Ideas	Launch of the Call for <i>Project Ideas</i>	04/2017
	Deadline for submission of proposed <i>Project Ideas</i>	07/2017
Stage 2 Project Proposals	Launch of the Call for <i>Project Proposals</i>	09/2017
	Deadline to submit <i>Project Proposals</i>	12/2017
	Selection of transnational projects	03/2018
Kick-off	Expected start of funded projects	06/2018
Close-out	Projects closing	12/2021

Table 2: Provisional time schedule for the Stage 1 and 2 process etc.

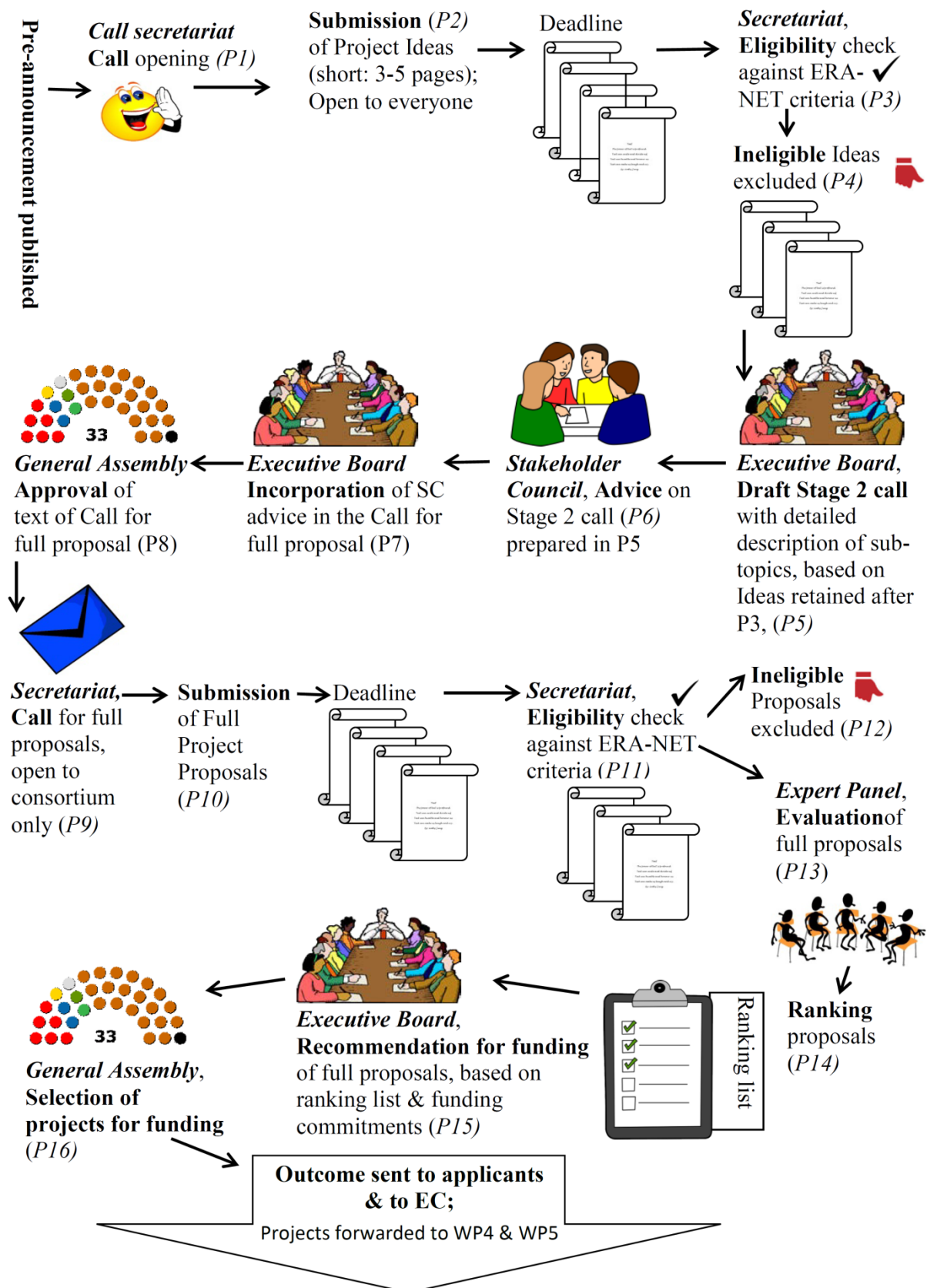


Figure 1: The call process.

4. Organizational structure

The GeoERA organizational structure is shown in Figure 2 below.

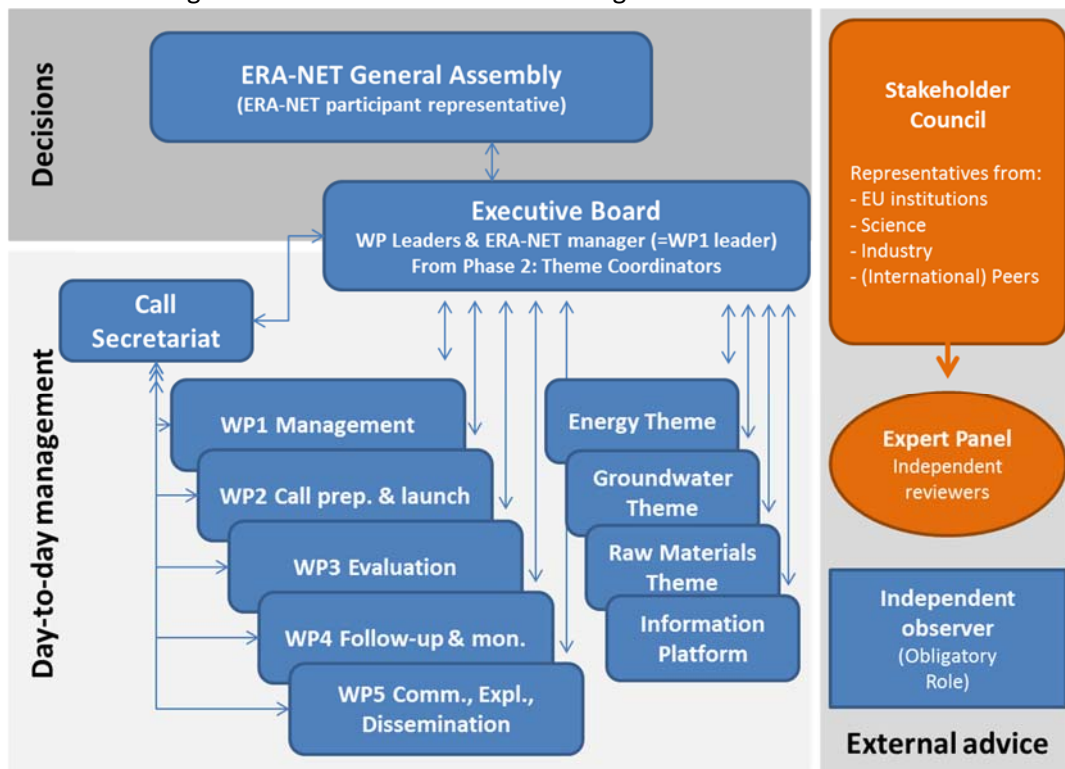


Figure 2: GeoERA organizational structure

The organization consists of:

- The General Assembly (GA) is the main decision body for the duration period of the GeoERA Grant Agreement. It consists of one representative from each partner in the GeoERA consortium; voting in the GA is done on the basis of one vote per country. The GA, among other things, is responsible for the approval of the call procedure and documentation (including the call text for both call stages), as well as for the final decision for funding of transnational projects.
- The Executive Board (EB) is responsible for the daily management of the project, and consists of the WP leaders, led by the Coordinator.
- The Call Secretariat maintains daily operations and consists of four GSOs (TNO, BGR, GEUS and GeoZS) led by the coordinator (TNO). The Call Secretariat supports the call process and carries out the coordination work divided into five work packages.
- When projects are funded, a Theme Coordinator will be selected for each theme (Geo-Energy, Groundwater, Raw Materials and Information Platform). These Theme Coordinators will become members of the EB.
- The Stakeholder Council (SC) consists of central stakeholders for the GeoERA products and is further described in this document. The SC is appointed by the GA.
- The Expert Panel (EP) consists of independent evaluators, who will evaluate and rank project proposals arising from the Stage 2 call. The ranking must be respected by EB and GA when funding the projects. The EP is proposed by the EB and approved by GA. The selection of Experts will be done by an independent research

organization – NWO (Netherlands Organization for Research) to secure independency and avoid conflicts of interest.

- The Independent Observer (IO) will monitor the effectiveness and quality of the call process as well as its compliance with EU co-funding rules. The IO is appointed by the GeoERA consortium.

5. Why a Stakeholder Council?

The grand challenges of Europe in the field of GeoERA themes are tasks shared by many organizations, public as well as private. GeoERA specifically aims to contribute to a common European Geological Knowledge Base and the development of a Geological Service for Europe, building on the data, information and knowledge held by Geological Survey Organization (GSOs)¹.

Such a Geological Service for Europe should support national and EU institutions in effective and evidence based policy and decision-making related to the subsurface.

The Geological Knowledge Base should also provide European stakeholders with access to objective and seamless data, information, knowledge and expertise on subsurface resources and their sustainable management.

To obtain these goals, input from dedicated main stakeholders on focus as well as on dissemination and exploitation of result from the GeoERA research activities are needed.

6. Stakeholder Council tasks

The Stakeholder Council will be appointed shortly after launching of the GeoERA project, January 1st 2017.

The Stakeholder Council is an advisory body and has three main tasks:

- Review and give advice on the Stage 2 call for project proposal. The EB will review Ideas as an outcome of Stage 1, evaluate these and write the Stage 2 call text for call for project proposals. This call text will be submitted to the SC for further input and to insure stakeholder relevance of GeoERA activities. After integration of SC's comments, the Stage 2 call text will be submitted to the GA for approval.
- Advice EB on the following issues:
 - External developments relevant for achieving progress towards the impacts of the call;
 - Maximizing GeoERA exploitation benefits;
 - Dissemination of GeoERA finding beyond the GeoERA consortium.
- Assist in the mid-term and final review of the Transnational Research Projects funded by GeoERA.

7. Members of the stakeholder council

¹ Geological Survey Organizations are mandated by their governments to gather - whether from third party exploration or in-house reconnaissance - and preserve subsurface data, to use those data to provide unbiased information on the structure and properties of the subsurface, and to make these data and information publicly available.

The Stakeholder Council will consist of 6-8 representatives of main stakeholders in the GeoERA. This includes:

- One representative from each of the following organizations: The European Commissions' Joint Research Centre (JRC), The European Environmental Agency (EEA), The European Plate Observatory System research infrastructure (EPOS): Further a representative for an international peer organization comparable to the partner organizations in GeoERA;
- 2-4 representatives from other stakeholders and stakeholder organizations working on European level, including industry.

8. Competences to be present in the Stakeholder Council and criteria for appointment

For the benefit of GeoERA and the stakeholders themselves, it is important that the representatives as a whole have profound insight into the four themes of GeoERA: Geo-Energy, Groundwater, Raw Materials resources and Information Platform including data management and dissemination.. Knowledge about the type of work GSO's perform is a desirable supplement, as GeoERA is a co-fund action that must be aligned with the task of the participating GSO's mandate.

9. Stakeholder Council meetings and involvement

The SC is expected to participate in the following "mandatory" meetings:

- a) Kick off Meeting (2 days) 17-18. January 2017 in Utrecht
This meeting will provide the SC members the opportunity to become familiar with the project objectives, its boundary conditions, and the call process
- b) SC consultation on Call text September 2017 (also GA-meeting)
- c) The Stakeholder Council is expected to review and comment on the Stage 2 call based on materials sent in advance of the meeting. The GeoERA Executive Board (EB) will present the content of, as well as the evaluation of Project Ideas received and other considerations underlying, the Stage 2 call text. The meeting will provide the EB with the opportunity to discuss the text and receive input from the SC. This input will be incorporated into the final call before submitting it for approval to the GA. After this approval the call Stage 2 will be launched.
As background materials SC will receive a review of the Ideas received through the call Stage 1. The Independent Observer will also participate in this meeting to monitor the effectiveness, quality and transparency of the process.
- d) Project Kick Off meeting August/September 2018
This meeting will provide the SC members the opportunity to become familiar with the objectives of the funded transnational projects, and with the monitoring process
- e) Midterm meeting (2 days) Marts/April 2020 (also GA meeting)
- f) Final Meeting/Conference November/December 2021 (also GA meeting)



- g) The Stakeholder Council will be invited to participate in all other GeoERA General Assembly meeting, which takes place twice a year, most likely in March-April and September-October.

10. Compensations to be paid by GeoERA

GeoERA will cover the cost for travel, accommodation and subsistence for participation in the “mandatory” meetings described above.

The participation in the other GeoERA GA (9g) are thought to be of mutual interest for GeoERA partners and the stakeholder and their organizations and GeoERA can only cover cost related to these meetings such as lunch, dinners etc., but not accommodation or travel cost.

ANNEX

Theme A: Geo-Energy

The scientific scope for Ideas focused on **Geo-Energy** shall consider hydrocarbons, energy derived from solid resources such as coal, geothermal energy from hydrothermal and petro-thermal resources, capacities for temporary storage of energy carriers and capacities for permanent storage of CO₂ and other energy effluents. Ideas shall fit under the following descriptions:

- To deliver harmonized pan-European information on:
 - Potential subsurface contributions with regards to energy resources and storage capacities;
 - Potential risks and environmental impacts associated with subsurface use for energy applications (e.g. seismic hazards);
 - Potential competition and interference between different uses of subsurface space, including interactions with surface infrastructures and near surface resources, and opportunities for synergies.

Theme B: Groundwater

The scientific scope for Ideas on **Groundwater** addresses the following eight societal themes:

- Groundwater & Drinking Water and Human Health, sustaining Europe's drinking water supply, including measures to prevent the further need for extensive purification;
- Groundwater & Agriculture, including aspects of water demands for irrigation and leaching of contaminants of diffuse sources to groundwater;
- Groundwater & Climate, including projected changes in groundwater recharge, extreme events (flooding and droughts) and adaptations towards resource management under CC conditions;
- Groundwater, Energy & Mining, including the interplay between the extraction of fossil fuels and groundwater, the storage of cold and heat and the use of geothermal systems, the abstraction of groundwater for mining purposes and the potentials of contamination by mining waste;
- Groundwater & Ecology, including the environmental objectives of the WFD for aquatic and terrestrial ecosystems in rivers and seas that are influenced by groundwater;
- Groundwater & Hazards, including sea water intrusion, landslides, induced and natural seismicity and land subsidence;
- Groundwater & Urbanized areas, including high-resolution characterization of the subsurface to support infrastructure and water and energy systems;
- Groundwater & Subsurface Spatial Planning as a management tools to promote sustainable use of the subsurface by different actors, ensuring future groundwater use and ecological and human wellbeing.

It requests Ideas relevant to at least one of these societal themes, which aim to deliver innovative harmonized groundwater information products and tools at three different scales:

- Pan-European products like maps and/or dedicated monitoring programs that create a form of harmonization between EU member states;
- Cross-border or multiple-country demonstration projects addressing issues or methodologies with high promise for deliverables relevant to harmonised future characterization and assessment tools;
- A smaller number of regional methodological studies, on the condition that they generate innovative and widely applicable information products or new methodologies and tools for harmonized assessment and/or characterization between GeoERA partners and European countries.

Theme C: Raw Materials

Of primary concern related to **Raw Materials** are a) security and sustainability of supply of mineral raw materials from EU domestic sources (primary and secondary); and b) managing competing uses of the European surface and subsurface, both on- and offshore.

The scientific scope of the present call for Ideas on Raw Materials “title” includes four main goals, hence:

- Extending, deepening, upgrading the quality of the pan-European primary and secondary continental and marine resources inventory;
- Updating contributions to and augmenting the coverage of the Annual Minerals Yearbook published by the Minerals4EU project;
- Performing pilot studies supporting exploration and development of mineral raw materials; and
- Implementation of innovative and efficient approaches throughout the value chain, with the aim of optimizing the use and management of the resources, while minimizing negative environmental, health and societal impacts.

With respect to the main challenges in the area of raw materials the Ideas shall aiming towards the goals and should address the development and application of new technologies, models and actions to both highlight the attractiveness of the mineral endowment of Member State jurisdictions, and ensure that any possible negative aspects are carefully managed.

Theme D: Information Platform

All Themes above share the objective to provide and disseminate spatial information on their respective resources and underpinning geological data.

The scientific scope of Ideas on **Information Platform** addresses collaborative approaches in the following research and innovation fields:

- Effectively integration of spatial information and all ICT-related and technical issues (database and dissemination) from the three Themes above;
- Establishing and promoting a cross-cutting information system which ensure practicability and cross-thematic integration for Themes mentioned in the call for Ideas;
- Building systems for integrating and consolidating data from regional/national level to EU level, thereby ensuring fast access to data that is as complete and up-to-date as possible;
- Establishing pan-European and more local (cross-border) databases with a coordinated structure to store raw data, interpretations, and models;
- Developing standards for interoperable cross-border and pan-European scale geological base maps and datasets for Europe, including stratigraphic correlation schemes, compatible model scales and resolutions, structural geological definitions, etc.;
- Registering and disseminating metadata including uncertainty figures about the maps, databases, products and services in a user-friendly way making it easy to find all data and to assess its relevance for a certain use;
- Setting up services to make data available according to INSPIRE and other standards making it easy to use data from different sources and thematic areas in combination and for instance solve question of conflicting interests in a certain area and depth;
- Building portals with user-friendly functions for search, visualization, analysis and download of data for management as well as research purposes in a regional to Pan European context (e.g. cross-thematic analyses for spatial planning purposes);
- Providing training and technical support to the data providers at regional and national level.

GEOERA PROJECT IDEA ELIGIBILITY CHECKLIST

[illegible]

[illegible]

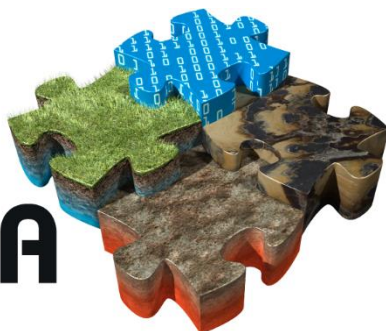
GEOERA PROJECT IDEA ASSESSMENT SHEET

[illegible]

Overview of criteria as described in Call Document JC No 6 for assessment by the GeoERA Executive Board

[illegible]

GeoERA



Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe

JOINT CALL DOCUMENT NO.8A

CODE OF CONDUCT AND DECLARATION

Stage Two - Project Proposals

Joint Call on applied geoscience in the fields of:

- Geo-energy
- Groundwater
- Raw materials
- Information platform

Version no: 1.0

Last change 31 March 2017 17:00



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 731166

TABLE OF CONTENTS

1	Scope	2
2	Performing the Evaluation	2
3	Impartiality	2
4	Confidentiality	3
5	Personal Data	5
6	Conditions of Evaluation	5



1 Scope

This form describes Code and Conduct in relation to performing GeoERA Stage Two evaluation. Each referee must complete a Form 8a: Code of Conduct and Declaration (i.e. it must be signed) and return it to GeoERA@nwo.nl prior to undertaking their evaluation. GeoERA will not grant access to proposals until a signed Form 8a has been received.

2 Performing the Evaluation

The independent expert works independently, in a personal capacity and not on behalf of any organisation.

The independent expert must:

- evaluate each proposal in a confidential and fair way, in accordance with Document 8: Evaluation and selection of GeoERA proposals.
- assist the Netherlands Organisation of Scientific Research (NWO) to the best of their abilities, professional skills, knowledge and applying the highest ethical and moral standards
- follow any instructions and time-schedules given by NWO and deliver consistently high quality work.

The independent expert may not delegate another person to carry out the work or be replaced by any other person. Therefore, if for any reason, they are unable to evaluate a proposal/project, they **MUST** inform NWO immediately.

If a legal entity involved in a proposal approaches the independent expert during the evaluation, the independent expert must immediately inform NWO.

3 Impartiality

The independent expert must perform their work impartially. To this end, the independent expert is required to:

- inform NWO of any conflicts of interest arising in the course of their work including any proposal competing with the proposal where the independent expert may have a conflict of interest;
- confirm there is no conflict of interest for each proposal they are evaluating by signing this declaration.



DEFINITION OF THE CONFLICT OF INTEREST: for a given proposal, a conflict of interest exists if an independent expert:

- was involved in the preparation of the proposal
- stands to benefit directly or indirectly if the proposal is accepted
- has a close family or personal relationship with any person representing an applicant legal entity
- is a director, trustee or partner or is in any way involved in the management of an applicant legal entity
- is employed or contracted by one of the applicant legal entities or any named subcontractors
- is already involved in GeoERA.

In the following situations NWO will decide whether a conflict of interest exists, taking account of the objective circumstances, available information and related risks when an independent expert:

- was employed by one of the applicant legal entities in the last three years
- is involved in a contract or grant agreement, grant decision or membership of management structures (e.g. member of management or advisory board etc.) or research collaboration with an applicant legal entity or the fellow researcher, or had been so in the last three years
- is in any other situation that could cast doubt on their ability to participate in the evaluation of the proposal impartially, or that could reasonably appear to do so in the eyes of an external third party.

CONSEQUENCES OF CONFLICTS OF INTEREST:

- If a conflict of interest is reported by the independent expert or established by NWO, the independent expert must not evaluate the proposal concerned, or take part in any discussions related to the proposal.
- If a conflict becomes apparent at any stage of the evaluation, the independent expert must immediately inform NWO. If a conflict is confirmed, the independent expert must stop evaluating the proposal concerned. Any comments and scores already given by the independent expert will be discounted. If necessary, the independent expert will be replaced.

If it is revealed during an evaluation that an independent expert has knowingly concealed a conflict of interest, the independent expert will be immediately excluded. Any consensus group in which they have participated will be declared null. The consensus group meeting will be reconvened and the proposal(s) concerned will be re-evaluated.

4 Confidentiality

NWO and the independent expert must treat confidentially any information and documents, in any form (i.e. paper or electronic), disclosed in writing or orally in relation to the evaluation.

The independent expert undertakes to observe strict confidentiality in relation to their work. To this end, the independent expert:



- must not use confidential information or documents for any purpose other than fulfilling their obligations under the Contract without prior written approval of NWO
- must not disclose, directly or indirectly, confidential information or documents relating to proposals or applicants, without prior written approval of NWO.

In particular, the independent expert:

- **MUST NOT DISCUSS** any proposal with others, including other independent experts or GeoERA staff not directly involved in evaluating the proposal, except during the formal discussion at the meetings moderated by NWO
- **MUST NOT DISCLOSE:**
 - any detail of the evaluation process and its outcomes or of any proposal submitted for evaluation for any purpose other than fulfilling their obligations under the appointment without prior written approval of NWO
 - their advice to NWO on any proposal, to the applicants or to any other person (including colleagues, students, etc.)
 - the names of other independent experts participating in the evaluation. The European Commission may be informed of the independent expert's names, and they may publish a list of names (as may NWO), however the proposals and projects assigned to each independent expert will not be disclosed.
- **MUST NOT COMMUNICATE** with applicants on any proposal:
 - during the evaluation, except in a review meeting organised by NWO as part of the evaluation process;
 - after the evaluation.

If the proposals are made available electronically to the independent expert who then works from their own or other suitable premises, they will be held personally responsible for maintaining the confidentiality of any documents or electronic files sent, and for returning, erasing or destroying all confidential documents or files upon completing the evaluation as instructed.

If the evaluation takes place in premises controlled by NWO, independent expert:

- must not remove from the premises proposals, copies or notes on evaluation, either on paper or in electronic form
- will be held personally responsible for maintaining the confidentiality of any documents or electronic files sent, and for returning, erasing or destroying all confidential documents or files on completing the evaluation as instructed.

If the independent expert seeks further information (for example through the internet, specialised databases, etc.) to complete their examination of the proposals, s/he:

- must respect the overall rules for confidentiality for obtaining such information
- must not contact applicants
- must not contact third parties without prior written approval of NWO.

These confidentiality obligations are binding on the independent expert during the evaluation and for five years starting from the date of the last payment made to the independent expert unless:



-
- NWO agrees to release the independent expert from the confidentiality obligations earlier
 - the confidential information becomes public through other channels
 - disclosure of the confidential information is required by law.

5 Personal Data

All personal data processed in connection with the evaluation process, must be processed in accordance with Regulation (EC) No 45/2001 of the European Parliament and of the Council (18 December 2000) on the protection of individuals with regard to the processing of personal data by the Community institutions and bodies and on the free movement of such data.

Independent experts have the right of recourse to the European Data Protection Supervisor.

They may also, on written request, gain access to their personal data (and correct it) by contacting the GeoERA secretariat.

6 Conditions of Evaluation

All results of the evaluation are the property of GeoERA, except where industrial or intellectual property rights exist.

GeoERA shall not, for any reason, be liable for damage sustained during the evaluation. In addition, the provisions of Form 8a: Code of Conduct and Declaration do not constitute an employment agreement and GeoERA is not liable to provide compensation in the event of injury or illness.



I, the undersigned, confirm that I have read, understood and accept Form 8a: Code of Conduct and Declaration.

Call Title: GeoERA Stage Two Call

I declare that I am not (to my knowledge), directly or indirectly involved in any proposal in this Call, other than the conflicts of interest declared below:

Proposal number	Conflict of interest

If I later discover any additional conflicts of interest I will update this declaration and contact the GeoERA secretariat (geoera@tno.nl) immediately.

I accept responsibility for maintaining the confidentiality of all documents or electronic files used in the evaluation process and for erasing or destroying all documents and files upon completing my evaluation.

I will not disclose details of the proposal(s) or project(s), the evaluation process or its outcomes, or other independent expert's identities without written approval from GeoERA.

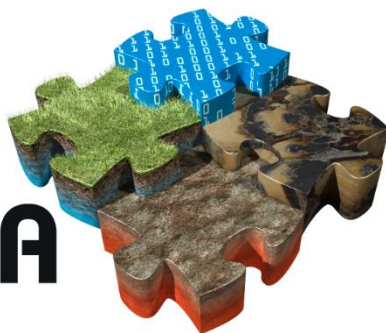
I agree to the use of my personal data for the purpose of the evaluation and according to the provisions set out in Form 8a: Code of Conduct and Declaration.

Signed:

Name:

Date:

GeoERA



Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe

JOINT CALL DOCUMENT NO.8B

EVALUATION FORM

Stage Two - Project Proposals

Joint Call on applied geoscience in the fields of:

- Geo-energy
- Groundwater
- Raw materials
- Information platform

Version no: 1.0

Last change 31 March 2017 17:04



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 731166

TABLE OF CONTENTS

Evaluation Form	2
Scoring.....	3



Evaluation Form

GeoERA call topic		Conformity with the topic objectives	Tick one
Proposal number		Fully conforms and addresses all the objectives	
Acronym		Partially conforms & any deviation is appropriately justified	
Total score	/15 Threshold 10/15	Does not conform, OR any deviation is NOT justified	
Is the proposal suitable for funding?	Yes/No	Date of evaluation	
Does each participant have the necessary basic operational capacity to carry out their proposed activities? Yes/No		If no, please add comments:	

CRITERIA	ASPECTS TO CONSIDER:	REFEREES COMMENTS:	SCORES
EXCELLENCE	<p>To the extent that the proposed work corresponds to the topic description of the call:</p> <ul style="list-style-type: none"> Clarity and pertinence of the objectives Soundness of the concept, and credibility of the proposed methodology Extent that the proposed work is beyond the state of the art, and demonstrates innovation potential (e.g. ground-breaking objectives, novel concepts and approaches, new products, services or business and organizational models) Appropriate consideration of interdisciplinary approaches (in particular interactions with other GeoERA themes) and use of stakeholder knowledge 		/5
			Threshold 3/5
IMPACT	<ul style="list-style-type: none"> The extent to which the outputs of the project would contribute to each of the expected impacts listed in the Stage 2 Call under the relevant topic Any substantial impacts not mentioned in the Stage 2 Call, that would enhance innovation capacity, creating new market opportunities, strengthen competitive-ness and growth of companies, Address issues related to climate change or the environment, cover the interest of multiple European countries, or bring other important benefits for society; The quality of the proposed measures to¹: <ul style="list-style-type: none"> Exploit and disseminate the project results (including management of IPR), and to manage research data where relevant Communicate the project activities to different target audiences 		/5
			Threshold 3/5

¹ Proposed measures and approaches should specifically take into account, and align with, IPR and data management agreements and communication activities described in the overall GeoERA Grant Agreement and Consortium Agreement



QUALITY AND EFFICIENCY OF THE IMPLEMENTATION	<ul style="list-style-type: none">○ Quality and effectiveness of the work plan, including extent to which the resources assigned to work packages are in line with their objectives and deliverables;○ Appropriateness of the management structures and procedures, including risk and innovation management²;○ Complementarity of the participants and extent to which the consortium as whole brings together the necessary expertise;○ Appropriateness of the allocation of tasks, ensuring that all participants have a valid role and adequate resources in the project to fulfil that role.		/5
			Threshold 3/5

Scoring

Scores must be in the range 0-5. Evaluators will be asked to score proposals as they were submitted, rather than on their potential if certain changes were to be made. When an evaluator identifies significant shortcomings, he or she must reflect this by awarding a lower score for the criterion concerned.

Interpretation of the scores

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.

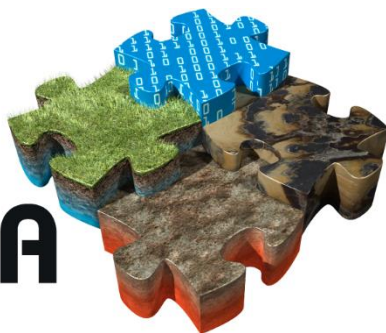
5 — Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Thresholds

The threshold for individual criteria is 3. The overall threshold, applying to the sum of the three individual scores, is 10.

² Specific guidelines for project management structures agreed in the overall GeoERA Grant Agreement and Consortium Agreement must be taken into account

GeoERA



Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe

JOINT CALL DOCUMENT NO.8C

PAYMENT TO INDEPENDENT EXPERTS

Stage Two - Project Proposals

Joint Call on applied geoscience in the fields of:

- Geo-energy
- Groundwater
- Raw materials
- Information platform

Version no: 1.0

Last change 31 March 2017 17:07



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 731166

TABLE OF CONTENTS

1	Scope	2
2	Eligible claims	2
2.1	Honorarium	2
2.2	Travel Expenses	2
2.3	Accommodation Expenses	3
3	How to claim.....	3



1 Scope

This form explains how independent experts, who are part of the Expert Panel, can claim an honorarium and expenses for participation in the GeoERA evaluation process. This does not account for the Technical Experts, who perform on online evaluation.

2 Eligible claims

Performing the evaluation Expert Panel members are not remunerated but will be entitled to an honorarium for evaluating proposals. This is an ex gratia payment, not a payment for the supply of services to GeoERA. In addition to the honorarium, Independent Experts from the Expert Panel can claim their major travel expense and the cost of hotel accommodation associated with attending the review meeting.

All claims must be received within one month of the review meeting and should be kept to a reasonable minimum. VAT and other taxes where identifiable cannot be reimbursed due to EC funding rules. Please note that for airline tickets; fuel, insurance and security surcharges are not classified as taxes and are reimbursable. However, Air Passenger Duty is classified as a tax and cannot be reimbursed.

2.1 Honorarium

The honorarium is a fixed amount of €250 for evaluating proposals. It is ONLY paid to Independent Experts from the Expert Panel who satisfactorily complete the full evaluation process. The honorarium is offered to the Experts as recognition of their expertise, a reward for their contribution to the review process, and to cover minor expenses such as additional meals and local transport (bus, tram, metro, taxi, parking, petrol costs, etc.).

2.2 Travel Expenses

The major travel expense to the review meeting is reimbursed on the basis of actual expenditure. The most economical means of travelling must be chosen. This is usually an economy train fare or economy flight, non-flexible. Please note that for air travel, the air ticket, e-ticket or receipt are all acceptable as proof of purchase. If travelling by car, mileage must be noted and will be paid at 30 cents per km. Receipts for petrol must be provided.

All additional minor transport expenses are considered covered by the honorarium. In the case of expenses in currencies other than EURO, the GeoERA secretariat will apply the European Commission's monthly accounting rate (for the invoice date). The rates are published at

http://ec.europa.eu/budget/contracts_grants/info_contracts/infoeuro/index_en.cfm



2.3 Accommodation Expenses

A review meeting will be held at The Hague, The Netherlands, chosen by the Netherlands Organisation for Scientific Research (NWO). The accommodation is reimbursed for the duration of the review conference or consensus group meeting. However, please note that GeoERA are unable to reimburse costs for VAT.

In the exceptional circumstance that an extra night's accommodation enables an Independent Expert to obtain cheaper travel (i.e. saving more than the hotel's nightly rate) then this extra night may be claimed. However, in such cases, the GeoERA Secretariat (info@geoera.eu) must be contacted in advance.

3 How to claim

The honorarium is usually paid to individual Independent Experts; however GeoERA recognises that some companies/institutions do not allow this. Therefore, the claim form enables you to indicate if it should be paid to your company/institution rather than your personal account, or if the honorarium cannot be accepted.

Expenses are usually reimbursed to your company, however if you incurred the expenses yourself you may claim these back directly. Proof of expenses is required, and in most circumstances original receipts are required for each item, but, if your company requires the original receipts for their accounts, we will accept photocopies of receipts.

All claims MUST be received on Form 8c (below): Payment to Independent Experts, within one month of the review conference or consensus group meeting, otherwise payment cannot be made.

The completed claim form, with the receipts attached, should be sent to: GeoERA, att. Yvonne Schavemaker, TNO Utrecht, P.O. Box 80015, NL – 3508 TA Utrecht.



BASIC DATA

NAME OF REVIEW MEETING	
DATE AND LOCATION OF MEETING	
NAME OF INDEPENDENT EXPERT	
NAME AND ADDRESS OF EMPLOYER	
EXPERT'S TELEPHONE NUMBER	
EXPERT'S EMAIL	

CLAIM DETAILS:

	AMOUNT CLAIMED (€)	RECEIPT INCLUDED	DATE OF EXPENDITURE	DETAILS (e.g. travel, accommodation)	REIMBURSE (delete as appropriate)
HONORARIUM	250 € or 0 €	n/a	n/a	Honorarium for evaluation	expert/employer
HOTEL COSTS		Yes/No			expert /employer
ECONOMY TRAIN- FARE/FLIGHT		Yes/No			expert /employer
OTHER COSTS		Yes/No			expert /employer
TOTAL (€)					

BANKING DETAILS:

	EXPERT'S ACCOUNT	EMPLOYER'S ACCOUNT
NAME OF ACCOUNT HOLDER (as registered with the bank)		
ADDRESS OF ACCOUNT HOLDER (as registered with the bank)		
CONTACT PERSON FOR THE ACCOUNT HOLDER (e.g. company financial contact)	n/a	Name: Tel: Email:
BANK NAME		
FULL BRANCH ADDRESS		



(P.O. BOX not acceptable)			
UK:	Account number		
	Bank code		
EUROPE:	Swift address code		
	IBAN number		
US:	A.B.A/routing code		

SEND TO: GeoERA, att. Yvonne Schavemaker, TNO Utrecht, P.O. Box 80015, NL – 3508 TA Utrecht.



Establishing the European Geological Surveys Research Area to deliver a Geological Service for Europe

JOINT CALL DOCUMENT NO.8D

QUALIFICATION PROFILE OF EXPERT PANEL MEMBERS

Stage Two - Project Proposals

Joint Call on applied geoscience in the fields of:

- Geo-energy
- Groundwater
- Raw materials
- Information platform

Version no. 1

Last change 30 April 2017 20:23



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 731166

Qualification profile of expert panel members

The evaluation of proposals submitted for the GeoERA Stage Two Call for projects will be carried out by Independent Experts in two steps:

1. An initial written review by **Technical Experts**
2. An final review by an **Expert Panel** who will meet face-to-face for evaluation and ranking of the proposals

Experts will be selected from the international community, for the Technical Experts with a focus on the proposals, and for the Expert Panel with a focus on the themes and cooperation and tasks of geological surveys , as indicated by the GeoERA Executive Board.

The Experts must all fulfil the following criteria:

- High professional expertise in at least one of the themes Geo-energy, Groundwater, Raw materials, or Information Platform as evidenced by a recognized track record;
- Knowledge and experience in the exploitation and transfer of research outcomes to society, industry and policy;
- Experiences with international cooperation in science and technology;
- Familiar with the tasks of Geological Survey Organisations;
- Possess language skills appropriate for reading and understanding proposal text in English.

NWO will seek a balance in geographical diversity, age, and gender. Besides, a balance between academics and experts with industrial or other relevant experience will be secured. The experts will be chosen to avoid potential conflict of interest according to the NWO code of conduct on Conflict of Interest. NWO takes all reasonable steps to ensure that experts will not be faced with a conflict of interest between their own research/business interests, and their evaluation activities of GeoERA project proposals. All Experts must abide by and sign the Code of Conduct and Declaration prior to beginning any evaluation..

All Independent Experts will be selected by the Netherlands Organisation for Scientific Research (NWO) using international databases, such as ExpertLookup. A description of the process of selection of Experts is described in NWO Staff Manual Chapter 8 (Annex A)

Technical Experts:

Each proposal will be reviewed in a written procedure by at least three technical experts.

These will be selected using the same criteria as the Independent Experts, but with a narrower focus and deeper knowledge on the specific topics of the individual proposals (rather than the call).

Expert Panel:

For the second step the Expert Panel will consist of up to 12 persons. Each proposal, with its technical reviews, will be evaluated by at least three appropriate members of the Expert Panel. The panel will provide the ranking of the proposals in each of the themes and will advise the GeoERA Executive board, which in turn will advise the GeoERA General Assembly on the project to fund under GeoERA.

Annex A –

NWO staff manual - Translation of Chapter 8

Method 8: Expert Lookup

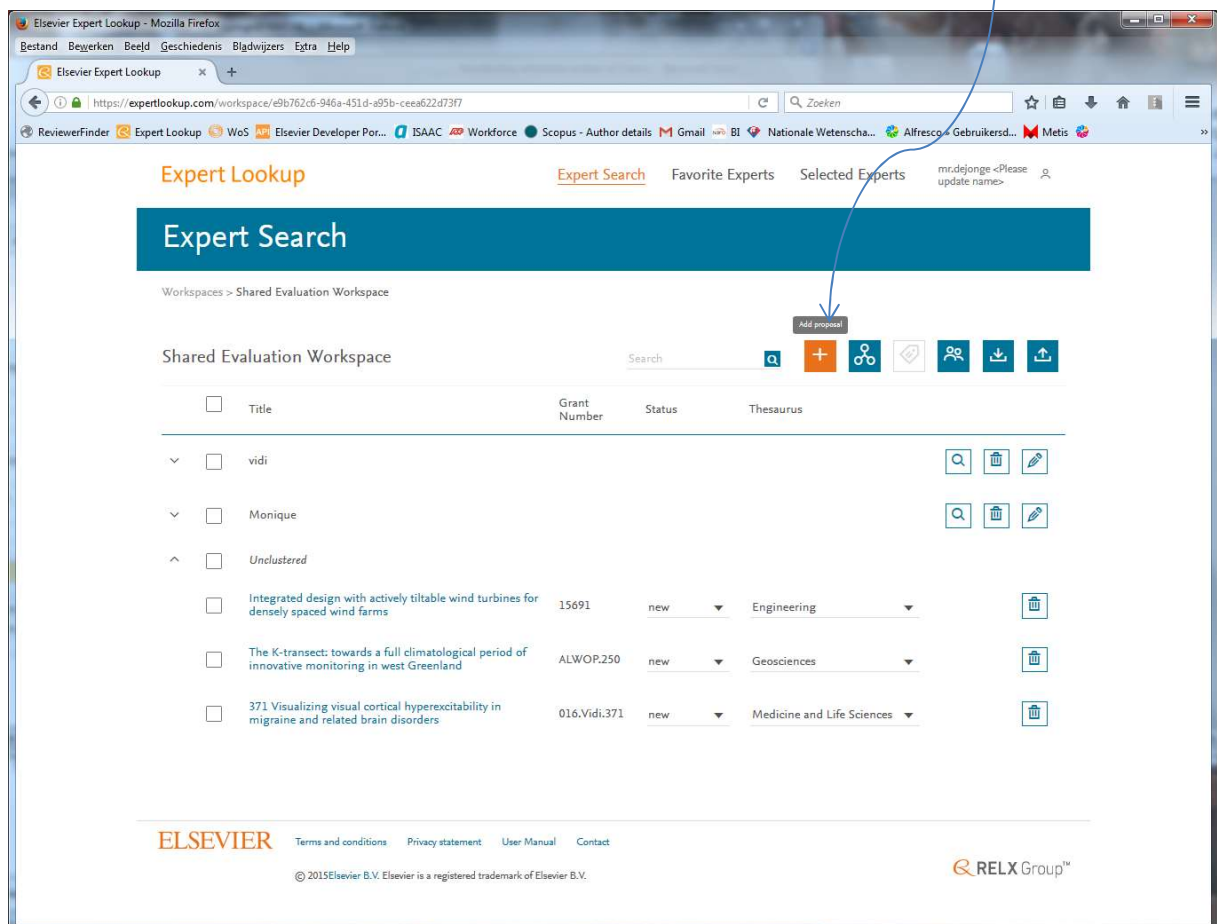
- Search portal: <https://expertlookup.com/NWO>
- Login: Username and password through application manager

Expert Lookup is the updated version of Elsevier Reviewerfinder (Chapter 6). Elsevier has based the application on their Scopus literature database covering papers, books and professional publications (<https://www.elsevier.com/solutions/scopus/content>). This is a web-based application specifically aimed at finding experts for peer-review. Expert Lookup uses the same fingerprinting and thesaurus as Reviewerfinder. It is important to offer a piece of text to develop a fingerprint; this can be the abstract, the proposal, or other relevant texts. It implements a text-recognition algorithm to search for related publications, as opposed to author-recognition as many other tools do. The result is that Expert Lookup, in theory, will be able to query outside the citation-network of author compared to other strategies (chapters 1-5).

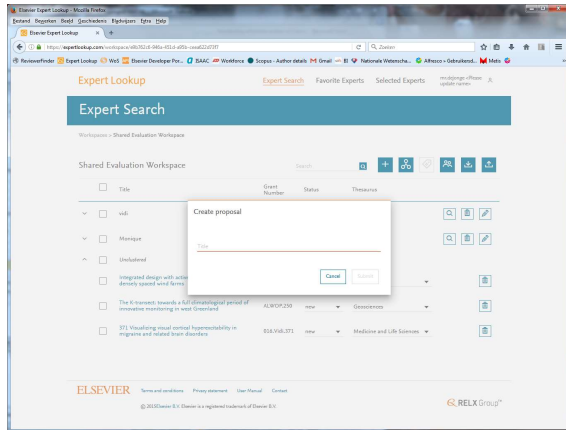
On top of that the application offers an automatic check on professional conflict of interest between applicants and potential reviewers. This increases the probability of finding less close cooperating reviewers and a more objective assessment of proposals.

Step 1

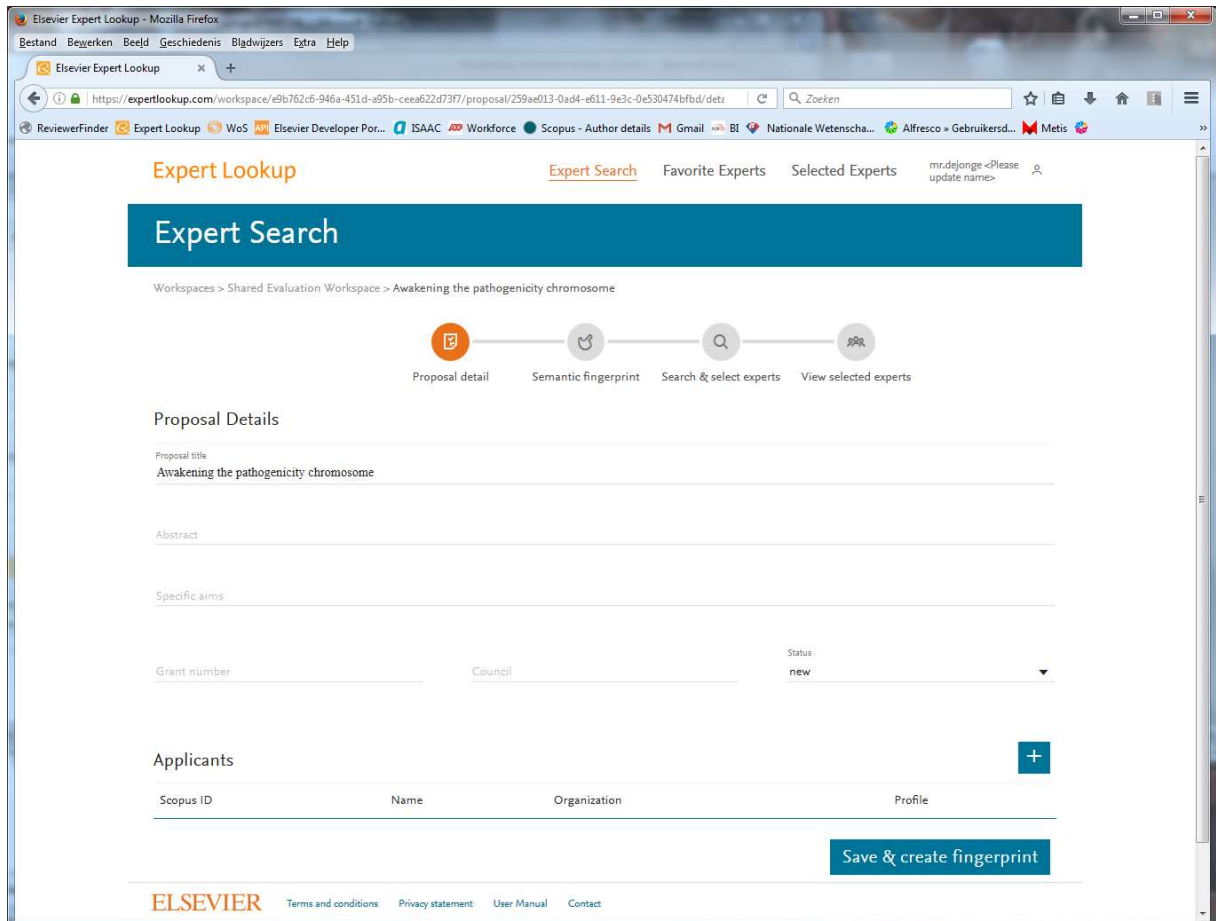
After logging in a new search can be initiated by selecting the '+' sign 'Add Proposal':



The first dialog asks for the title of the project:



And subsequently an entry screen in which you can enter abstract, keywords, file-number and (co)applicants). The orange 'breadcrumbs' allow for easy navigation through the application (from entry to search).

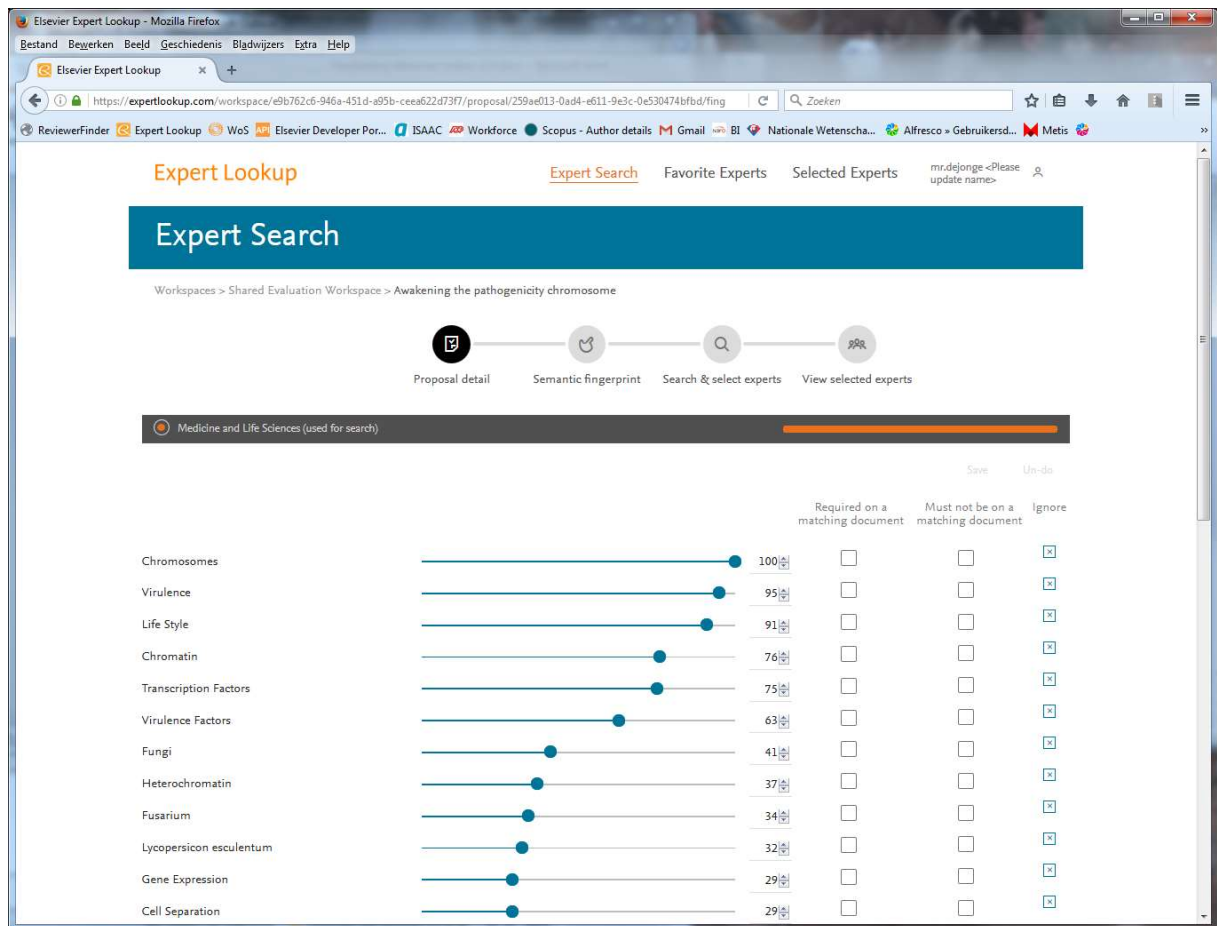


Note that the Title is important: If the applicant use a play on words it may be better to provide a few key-concepts. The software has no sense of humor and regards the title as leading for the subject matter.

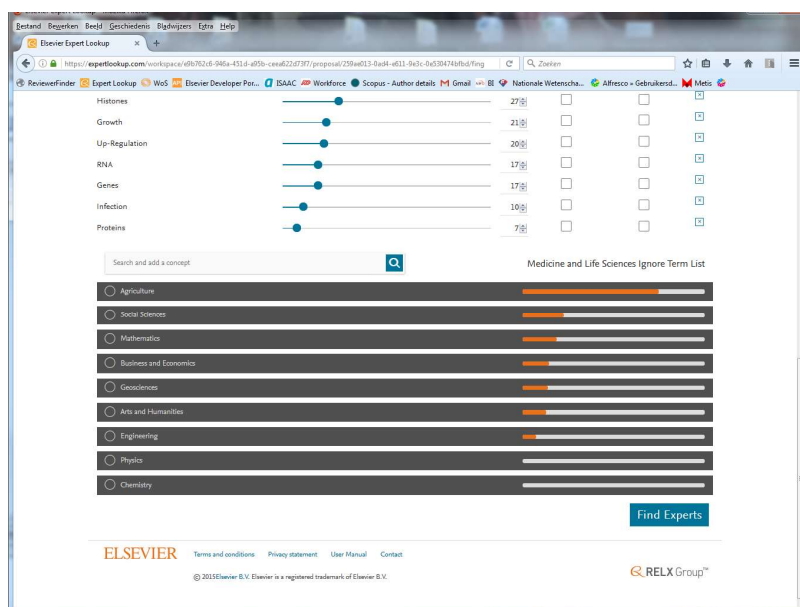
The 'Specific Aims' block is treated in the same manner as the abstract to generate the fingerprint. Click on 'Save Grant Data...' immediately after entering the data to generate the fingerprint (and to prevent losing all data due to a time-out).

Step 2

After 'Save Grant ...' a new screen is shown with as (preliminary) fingerprint and some additional fields:



The best fitting fingerprint is shown, but also the score using a different thesaurus is computed (orange bar show the relative matching):



Step 3

By choosing 'Find Experts' a list of potential reviewers is generated:

Elsevier Expert Lookup - Mozilla Firefox

https://expertlookup.com/workspace/e9b762c6-946a-451d-a95b-ccc622d73f7/proposal/259ae013-0ad4-e611-9e3c-0e530474bfbf/sear

Proposal detail Semantic fingerprint Search & select experts View selected experts

Hide filters

Apply filter

Thesaurus

h-index

Countries

Groups of experts

Publications

Journals

Conflict of Interest

Apply filter

Awakening the pathogenicity chromosome

H. Charlotte Van Der Does

200 experts based on Medicine and Life Sciences thesaurus

Search within resultset

<input type="checkbox"/> Rank	Name	Institution	Matching pub.	First author	Last author	Total pub.	h-index	Potential COI	Assign Expert
<input type="checkbox"/>	Michael Freitag	Oregon State Unive...	8	0	2	69	33	Yes	No
<input type="checkbox"/>	Kazuhiro Maeshima	Sokendai Graduate ...	8	2	6	53	22	No	No
<input type="checkbox"/>	Yasumasa Joti	Japan Synchrotron ...	5	2	2	51	13	No	No
<input type="checkbox"/>	Job Dekker	University of Massa...	5	1	2	114	47	No	No
<input type="checkbox"/>	Hideaki Takata	Osaka University	5	2	0	30	13	No	No
<input type="checkbox"/>	Jessica L. Soyer	Christian-Albrechts...	4	3	0	5	2	Yes	No
<input type="checkbox"/>	Karl Ekwall	Karolinska Institutet	4	0	3	91	35	Yes	No
<input type="checkbox"/>	Lanelle R. Connolly	Oregon State Unive...	4	0	0	12	8	Yes	No
<input type="checkbox"/>	Takaaki Hikima	Riken	4	0	0	41	10	No	No
<input type="checkbox"/>	Édith Heard	Genetique et Biolo...	4	0	3	117	48	No	No

For each potential reviewer the number of matching publications is shown, and some additional metrics. Clicking the arrow left of the name show a list of matched publications.

Elsevier Expert Lookup - Mozilla Firefox

https://expertlookup.com/workspace/e9b762c6-946a-451d-a95b-ccc622d73f7/proposal/259ae013-0ad4-e611-9e3c-0e530474bfbf/sear

Proposal detail Semantic fingerprint Search & select experts View selected experts

Hide filters

Apply filter

Thesaurus

h-index

Countries

Groups of experts

Publications

Journals

Conflict of Interest

Apply filter

Awakening the pathogenicity chromosome

H. Charlotte Van Der Does

200 experts based on Medicine and Life Sciences thesaurus

Search within resultset

<input type="checkbox"/> Rank	Name	Institution	Matching pub.	First author	Last author	Total pub.	h-index	Potential COI	Assign Expert
<input type="checkbox"/>	Michael Freitag	Oregon State Unive...	8	0	2	69	33	Yes	No

View in Scopus Search the web for Michael Freitag

Matching publications

- 2016 *Neurospora chromosomes are organized by blocks of importin alpha-dependent heterochromatin that are largely independent of H3K9me3*
Galazka, J.M. | Klokos, A.D. | Uresaka, M. | Honda, S. | Selker, E.U. | ... | Freitag, M.
Matched fingerprints (weight): Chromatin (1) | Chromosomes (1) | Heterochromatin (0.37) | Histones (0.27)
- 2015 *Histone modifications rather than the novel regional centromeres of Zygosporium tritici distinguish core and accessory chromosomes*
Schotanus, K. | Soyer, J.L. | Connolly, L.R. | Grandaubert, J. | Happel, P. | ... | Freitag, M.
Matched fingerprints (weight): Chromatin (1) | Chromosomes (1) | Fungi (0.41) | Heterochromatin (0.37) | Histones (0.27)
- 2015 *Chromatin analyses of Zygosporium tritici: Methods for chromatin immunoprecipitation followed by high-throughput sequencing (ChIP-seq)*
Soyer, J.L. | Möller, M. | Schotanus, K. | Connolly, L.R. | Galazka, J.M. | ... | Freitag, M.
Matched fingerprints (weight): Chromatin (1) | Heterochromatin (0.37) | Histones (0.27) | Virulence (0.95)
- 2014 *Variability of chromosome structure in pathogenic fungi-of ends and odds*
Galazka, J.M. | Freitag, M.
Matched fingerprints (weight): Chromatin (1) | Chromosomes (1) | Fungi (0.41) | Histones (0.27)
- 2014 *Epigenetic control of effector gene expression in the plant pathogenic fungus Leptosphaeria maculans*
Soyer, J.L. | El Ghaili, M. | Glaser, N. | Oliver, B. | Linglin, J. | ... | Freitag, M.
Matched fingerprints (weight): Chromatin (1) | Fungi (0.41) | Heterochromatin (0.37) | Histones (0.27) | Life Style (0.91)
- 2013 *Two histone deacetylases, Efd1a1 and Efd1a2, are important for Equisetum telmateia secondary*

and below this list an overview is given of "Co-author competing Interests" if the "potential COI" column shows "Yes":

The screenshot shows the Elsevier Expert Lookup interface. On the left, there are filters for Thesaurus, h-index, Countries, Groups of experts, Publications, Journals, and Conflict of Interest. The main area displays a list of experts under the title "Awakening the pathogenicity chromosome" by H. Charlotte Van Der Does. The list includes columns for Rank, Name, Institution, Matching pub. author, First author, Last author, Total pub. Index, h-index, Potential COI, and Assign Expert. The first expert listed is Michael Freitag, with a Potential COI of "Yes". Below the list, there is a section for "Co-author competing interests" showing a publication co-authored by Michael Freitag and H. Charlotte Van Der Does.

In this example Van der Does has published once together with Freitag (details shown when you click on the number of potential COI's). The NWO-rules for COI are given at: <https://www.nwo.nl/en/documents/nwo/legal/nwo-code-of-conduct-on-conflicts-of-interest>. Default settings are ok for single applicants, but care must be taken in case of larger consortia (second-degree authorship relations can be selected in the left-hand panel)

The screenshot shows a pop-up window titled "Publications co-authored by Michael Freitag and H. Charlotte Van Der Does". It displays a list of publications, with the first entry being a 2010 publication titled "Comparative genomics reveals mobile pathogenicity chromosomes in Fusarium". The authors listed are Ma, L.-J., Van Der Does, H.C., Borkovich, K.A., Coleman, J.J., Daboussi, M.-J., ..., Freitag, M. There is a "Close" button in the bottom right corner of the pop-up.

By selecting "assign Expert" for all non-blocking potential COI's they are added to the working list. The sample below shows that for three nnames.

<input type="checkbox"/>	Rank	Name	Institution	Matching pub.	First author	Last author	Total pub.	h-Index	COI	Assign Expert
^	<input type="checkbox"/>	Michael Freitag	Oregon State Univ...	8	0	2	69	33	Yes	<input type="radio"/> No
<div> View in Scopus Search the web for Michael Freitag </div> <div> Matching publications </div> <div> Co-author competing interests </div> <div> Michael Freitag and H. Charlotte Van Der Does co-authored 1 publication </div>										
∨	<input type="checkbox"/>	Kazuhiro Maeshima	Sokendai Graduate ...	8	2	6	53	22	No	<input checked="" type="radio"/> Yes
∨	<input type="checkbox"/>	Yasumasa Joti	Japan Synchrotron ...	5	2	2	51	13	No	<input checked="" type="radio"/> Yes
∨	<input type="checkbox"/>	Job Dekker	University of Massa...	5	1	2	114	47	No	<input checked="" type="radio"/> Yes
∨	<input type="checkbox"/>	Hideaki Takata	Osaka University	5	2	0	30	13	No	<input type="radio"/> No

The list can be inspected by choosing "View Selected Experts":

The fastest way to approach reviewers is by using the "Export" button to generate a list of Scopus ID's and search those through Scopus (See chapter 7). Of course you can also search for recent contact details through Google Scholar etc.

Tuning of search results

For selecting better search results the filter can be modified. With additional criteria for country, H-index, number of publications, type of publication, etc. Also some controls are given for the COI testing criteria.

The screenshot shows the Elsevier Expert Lookup interface in a Mozilla Firefox browser. The page title is 'Elsevier Expert Lookup - Mozilla Firefox'. The URL is 'https://expertlookup.com/workspace/e9b762c6-946a-451d-a95b-eea622d73f77/proposal/259ae013-0ad4-e611-9e3c-0e530474bfbd/s'. The page content includes a navigation bar with 'Proposal detail', 'Semantic fingerprint', 'Search & select experts', and 'View selected experts'. The main section is titled 'Awakening the pathogenicity chromosome' by H. Charlotte Van Der Does. It displays '200 experts based on Medicine and Life Sciences thesaurus'. A table lists experts with columns: Rank, Name, Institution, Matching, First pub. author, Last author, Total pub. Index, Potential COI, and Assign Expert. The table includes entries for Michael Freitag, Kazuhiro Maeshima, Yasumasa Joti, Job Dekker, Hideaki Takata, Jessica L. Soyer, Karl Ekwall, Lanelle R. Connolly, and Takaaki Hikima. A sidebar on the left contains filters for Thesaurus, h-index, Countries, Groups of experts, Publications, Journals, and Conflict of Interest. A 'Hide filters' button is at the top of the sidebar.

This close-up shows the 'Conflict of Interest' filter settings. The 'Conflict Publication Year Cut-Off' is set to '2012'. The 'Co-authoring distance' is set to 'Direct or One person in-between'. The 'Organization conflict' is set to 'Important'. The 'Apply filter' button is at the bottom. To the right, a list of experts is shown with checkboxes and names: Ya, Jol, Hi, Je:, Ka, La, Ta, and Ed.

Thesaurus selection

ExpertLookup always shows hits on different thesauri. Sometimes it is useful to select another list than the first hit from the text recognition. Especially when the abstract contains a lot of poorly distinguishing keywords. You also find a different population experts that way (eg. switching between Life-Sciences and Agriculture, or Geosciences and engineering).

The screenshot shows the ExpertLookup interface. On the left is a 'Thesaurus' panel with a list of categories and their corresponding hit counts (indicated by orange bars):

- Medicine and Life Sc... (0)
- Agriculture (1)
- Social Sciences (1)
- Mathematics (1)
- Business and Econo... (1)
- Geosciences (1)
- Arts and Humanities (1)
- Engineering (1)
- Physics (1)
- Chemistry (1)

On the right is a table of experts. The table has columns: Rank, Name, Institution, Matching pub., First author, Last author, Total pub., h-Index, Potential COI, and Assign Expert. The table lists several experts with their respective metrics and a 'Assign Expert' toggle.

Rank	Name	Institution	Matching pub.	First author	Last author	Total pub.	h-Index	Potential COI	Assign Expert
1	Gongyou Chen	Shanghai Jiaotong ...	5	0	5	41	10	No	No
2	Lifang Zou	Shanghai Jiaotong ...	5	0	0	40	10	No	No
3	José María Díaz-Mín...	Universidad de Sala...	3	0	2	18	13	Yes	No
4	Serenella Ana Sukno	Universidad de Sala...	3	0	1	29	10	Yes	No
5	Yonghwan Lee	Seoul National Uni...	4	0	4	99	27	Yes	No
6	Thierry Rouxel	INRA Centre de Re...	3	0	0	69	32	Yes	No
7	Vera Tello	Universidad de Sala...	2	0	0	5	2	Yes	No

Note:

See also chapter 9 for verification that the level of expertise is relevant for the proposal and chapter 10 on COI.