Writing Part II - Methodology ERC call 2026

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1. Background

In call 2026 the template has been dramatically simplified. Where in the past a 14-page full proposal was reviewed in step 2 of the review. For call 2026 only a seven-page methodology discussion is required as Part II. Part II therefore logically extends the discussion of Part I of the Scientific Proposal.

In the second step of the review the panel members will be receiving in-depth assessments of the documents from 2 to 5 in depth independent experts. The evaluation criteria for the Methodology for call 2026 have not been changed since the previous calls, see yellow highlighted box below, from previous calls; just the number of pages is limited to seven in call 2026. There will be an additional 2 pages for justifying the resources and PI commitment. These two pages will be either part of the online budget form as is currently the custom or may move to the end of the Part II as a separate section.

Below in the overview of the evaluation criteria, we highlighted those words in the criteria which do not re-appear in the writing instructions.

Expected instructions for call 2026 (for writing Part II) (waiting to be confirmed)

Methodology:

Describe the proposed methodology in detail including any key intermediate goals. Explain and justify the methodology in relation to the state of the art, and particularly novel or unconventional aspects, describe also the ambitiousness of the goals. Highlight any intermediate stages where results may require adjustments to the project planning. In case you ask that team members are engaged by another host institution their participation has to be fully justified by the scientific added value they bring to the project.

Corresponding evaluation criteria, see ERC Workprogramme 2026 (Waiting to be confirmed)

Methodology

- To what extent is the outlined scientific approach feasible bearing in mind the ground-breaking and ambitious nature of the research project (assessed at Step 1)
- To what extent is the proposed research methodology and proposed working arrangements appropriate to achieve the *goals* of the project (based on full Scientific Proposal)?
- To what extent are the proposed timescales, resources and PI Commitment adequate and properly justified (based on full Scientific Proposal)?

Introduction

Under call 2026 Part II of the Scientific Proposal is a logical continuation of Part I and has to address a coherent research design/work plan that will allow the Reviewers to understand how to the objectives discussed in Part I of the Scientific Proposal will be achieved. Therefore consider discerning the following aspects:

1) The basic research design that will allow the reviewers to understand how the work in broken down in coherent clusters of work (e.g. work packages, strands, thrusts, lines of in/enquiry etc)

2) The details on the conduct of each specific cluster of work (e.g. work packages). This has to be discussed in detail; therefore, the specific methods, techniques, tools appropriate for answering the research questions or probing the hypotheses or achieving the objectives. Therefore, how you will achieve ultimately the goals of your proposal;

3) Analysis of why it will be feasible to achieve the overall challenge of the project and therefore open up to the ambitious new research directions

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2. Research design – dynamic in its design

The scientific conduct needs a coherent project design/workplan and thus a scientific/scholarly robust structure of the research process. The research process for an ERC project is expected to reiterate, have feedback loops, between its different parts. It is not a linear structure but a dynamic process with interdependencies between the conduct of the work and the objectives discussed in Part I of the Scientific Proposal. The research design is the part of the proposal where it is demonstrated how the proposed methods will effectively address the research questions and/or objectives and/or test the hypothesis. This is the part that requires scientific/scholarly details on the specific methods in direct relation to objectives of Part I of the Scientific Proposal.[1]

The problem is that this is not similar to writing a scientific publication "where the scientific method more accurately describes how science is summarized after the fact than how scientific research is actually performed"[2]. When writing it as a publication it would result in linear descriptions of consecutive steps or phases but ignoring the dynamic interlinkage and interdependencies of the actual conduct of the research. In a grant like the ERC the emphasis is on your insight as to how the process may happen; how the dynamic interlinkage is considered, how this therefore may affect your concepts and /or hypotheses and may need a different approach to overcome possible hurdles.

In other words, writing ERC grants means explaining to both panel members and external in-depth reviewers the complex relationships that require explanation including the dynamics between the different parts of the work (e.g. work packages) that regulate the activity of research at and between each stage of the research process"[3]

Overall Structure

A research design / workplan / experimental workplan needs a structure to discuss the work to be undertaken. This design is focused on achieving the crucial piece of information to resolve the Big Research Question or Big Picture set out at the opening of the proposal. The work to be conducted is structured in logical parts. Each part consists of a group of activities; feedback links between the different parts ensure re-iteration with regard to the (project) concept(s), theories, hypothesis or research question.

In the training we discuss different types of structures ranging from a general structure where each WP (see below for an explanation on the term work package) is directly providing the investigation into finding the answers to the research questions or objectives as articulated in Part I of the Scientific Proposal. But we also discussed how more layered structures and in some cases a linear structure could be the appropriate research design.

Many Horizon Europe grants have a mandatory requirement to include work packages (WP). The ERC template offers no structure whatsoever and leaves it entirely up to the applicant to find the best way to present the work to be conducted. In the text below we will use the term WP as a term to cluster the packages of work (specific tasks brought together under the umbrella of a cluster of work). The term WP can be replaced by any other term that you find more appropriate for example ~~strand~~, thrust, line of in/enquiry, prong etc.

1. With the word research design we step away from terms as 'project design' and 'work plan'. Project design may also have a broader meaning as to include project management aspects like the 'work plan'. A work plan is for many researchers the place where the practical aspects of the project organization as time and resources are discussed. For ERC projects the workplan is embedded in the paragraph "impact analysis" where key intermediate goals are related to time and people without going into the specific details as a Gantt chart would do. .
2. https://undsci.berkeley.edu/faqs.php; Understanding How Science Really works. Date Februari 6, 2018
3. (Alhadeff-Jones 2012)

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Since there is no pre-designed template structure, own headings can be introduced. A pragmatic design for an ERC proposal is a design where each WP is directly connected to an objective as established in Part I of the Scientific Proposal.

The reviewers will need insight as to how the WPs will address the objectives and ultimate the big picture outcome. The latter can be a WP of its own or a discussion in the last section with regard to how over time the PI will be able to synthesize the results of the WP to the big picture outcome.

In the webinar we have shown and discussed several examples of WPs structures. Such a graphical visualisation of the research design is not mandatory but helps in understanding how the dynamic interlinkage is important as to getting to the ultimate goal.

2.1.1 Layered research design

We use this term when it is difficult to jumpstart the discussion on the research design directly by discussing a WP because there is something that needs to be explained first. This could be the specifics on the fieldwork that will be undertaken, or the case studies proposed, the material available (e.g. datasets, artefacts, sample materials,…….), the model system to be used etc. By discussing this first it creates a good overview to refer back to when the specifics of the work package are discussed. It does not have to be repeated.

A layered structure is often the consequence of the complexity discussed in Part I of the Scientific Proposal and links therefore to the question which requires a combination of a conceptual or theoretical framework (e.g. due to the intellectual puzzle or the vast landscape covered) and a novel approach. The complexity of the problem/question may therefore have a mirrored methodological complexity. In order to unravel the methodological complexity, it can be helpful to distinguish different dimensions of the investigation. The framework discussed in Part I may provide the rationale for the questions which questions here in the methodology part are then addressed through the WPs. The WPs form then the main vehicle for addressing the questions; to generate the groundbreaking contribution. The WPs allow transversal investigation across different cases, environments. Devices etc and by linking the WPs directly to the objectives/aims/questions as discussed in Part I of the Scientific Proposal you will create structural coherency between Part I and Part II.

By using the term “transversal investigation” we indicate that there is another dimension of investigation namely the cases, application, sectors etc. Quite often the cases will not have specific methods, the cases discuss the subject of investigation and why this is an appropriate focus for data gathering and analysis. It is the WP that breaks down what the conduct of work is that will be undertaken in relation to the case studies to obtain the data / insight that will allow answering a specific dimension of the framework linked to a specific question/objective.

The reviewers will need the details of the fieldwork, case studies, model systems as part of the rationale as to why you will be able to address the Big Research Question before they start reading the specific of the conduct of the work to be undertaken to answer each question (e.g. WP).

Some examples of what could be discussed as a layer before the discussion of the WPs across different disciplines:

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Social Sciences	Case studies,
Law	Themes, fields, environments
Engineering	Devices, applications, environments, test beds
Archeology	Artefacts, sites
Life sciences; biophysics	Model system, datasets e.g. cohorts, libraries
Geology, universe sciences	Datasets e.g. climate, stars, galaxies
Biology /ecology / evolutionary sciences	Field work, species, …
Physics, engineering	Experimental system
others	Any of the above
By separating the discussion on the "cases" from the discussion on the WPs you will avoid repetition of discussing methods/techniques deployed across cases. Each specific example listed above here comes with its own checklist for example, do you have access to the site, materials etc.	

Where the material is used for the conduct of the investigation it may only require a paragraph in length to provide the essential information to the reviewers. But when it is about e.g. case studies that will be the object of the investigation it may go anywhere from half a page to 2 pages of detailed discussion.

Method of Analysis / Analytical framework

Within the scope of the research design attention should be given as to how the collected data will be analysed. If research framework, see Part I of our material, has been important for providing the rationale for the objectives then how do the WPs link back to the research framework. At any rate it is important to discuss the rationale for the analytical frame or methods used and there can be different solutions how this is discussed in your research design.

2.1.2 Linearity may sometimes be unavoidable

Sometimes a linear research design is unavoidable. If that is the case, then describe the research design in a linear way and try to see where in the linear structure there are elements of the dynamic linkage and interdependencies requiring you to back track. It could be within a WP or this dynamic linkage may only occur there where you try to link your findings to the hypotheses underlying the Big Research Question. Be aware, that most likely a linear research design mirrors the linearity in the objectives as discussed in Part 1.

2.2 Detail the conduct of the work

A work package (strand, thrust, line of in/enquiry, prong etc) discusses a logical cluster of activities that need to be undertaken to answer a specific objective or provides input to different objectives. Therefore, a work package has different layers of detail:

Each task discusses in detail the specific methods, techniques, tools, equipment, data, materials (model system, corpora etc) needed to conduct the task. This means that a description of a task should contain the level of detail appropriate for the in-depth reviewer to assess if what is proposed is appropriate to achieve the goals.

When only is described "what" will be done, reviewers will assess the project as being descriptive only. To avoid this pitfall, ask yourself for each described task if the provided explanation is clear as to *How the work will be conducted*.

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The details to discuss include also where appropriate the justification (rationale) for the use of certain methods for as far as this is not discussed already in the concept, approach or objectives parts.

Experts – require careful consideration

When to include: Only include external experts, when there is truly no option in house. When you need experts for providing you with data, cell lines, access to archives etc this is never a problem. Experts who provide a crucial service that cannot be easily done by someone else – are a concern for reviewers since they award individual grants.

Where to include: it is important to make their role as narrow as possible therefore include reference to your experts by name at the appropriate place in the WP, preferably at the level of a specific task. They will also appear in the justification of the resources (separate 2-page document)

Why feasible: Assure in the resource justification the adequacy of having these experts available for the conduct of the work. Clarify their committed to do this work for you. If they require budget, it could be sufficient to clarify this in the justification of the resources that there is budget reserved for the work to be undertaken by the experts either in the form of remuneration for their time or travel budget. See the resource section for more information.

Feasibility

The ERC has stepped away of assessing the risks as a direct evaluation criterion. In the past reviewers had to assess the high-risk/high-gain dimension of the proposal. But this created so many difficulties in the review process that in call 2024 it was decided to replace it with the term Ambition combined with the term Feasibility. These terms can intuitively be understood across fields as to when something is ambitious and what makes this ambition potentially feasible. Therefore, we propose to the feasibility of the conduct of the work and the feasibility of achieving the ambition as follows:

1. Tasks of a WP. When intuitively you know that reviewers (panel or the in-depth expert) may question the feasibility of the conduct of the work then you may consider including an alternative for the proposed method, technique, tool, material etc directly at the level of a task.

2. End of a WP. When there is a specific hypothesis, strategy, approach driving the conduct of the WP then it may make sense at the conclusion of the WP to discuss why the work proposed in this WP is feasible and therefore will obtain the groundbreaking results.

3. Overall discussion on the feasibility of the ambition. Realizing the ambitious dimension may be challenging, therefore make clear at the very end of the methodology section why it is potentially feasible to achieve the ambitious goal of the project, see below key intermediate goals.

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3. Impact analysis: Feasibility of the Ambition

Most science panels select projects that are mature. Mature in the sense of a sound and well-developed project idea to address the challenge or research question but also mature in relation to the preliminary evidence underpinning the potential feasibility of the proposed research. The project is built on preliminary results but that doesn't mean that the proposed research is incremental it does mean quite often that it is a next logical step. The preliminary evidence only provides a glimpse of the potential for achieving the breakthrough. But to actually achieve the breakthrough there are still many unknown aspects that need to be further investigated.

Consider including an impact analysis as a separate heading at the end of the proposal as a concluding analysis of the ambitious dimension of achieving the ultimate goal and how your preliminary evidence provides you with the right starting point. Discuss why the project still will yield groundbreaking contributions even if it is perhaps a bit overambitious. It is for the groundbreaking dimension that alternative approaches have been discussed at the end of the WPs. In other words, assure the panel that they will always get value for money but perhaps not the breakthrough.

Balance the Ambition and your experience. A proposal of an Advanced Grant applicant may be more ambitious than the proposal of an applicant for Consolidator or Starting Grant. In other words, the more experienced you are, the more ambition you can and have to demonstrate. But a specific note for the Advanced Grant applicant: you have to build the case based on what consider to be at the core of your expertise; be careful with projects that are outside your main body of expertise.

The impact analysis is the final paragraph of Part II of the Scientific Proposal. In this paragraph or in combination with the paragraph timescales two strands need to be brought together in relation to time: one relates to the key intermediate goals as described above and the other relates to the strategy of deploying your team members towards achieving the goals see below.

3.1.1 Key Intermediate Goals - Timescales

After having assessed the research design the reviewers will assess if the project is focussed on achieving a potential breakthrough being the very significant gain. Therefore, they have to assess whether the methodology is appropriate for achieving the goals. Goals should not be understood as another word for objectives. The goals converge multiple outcomes of WPs in a meaningful way towards the potential breakthrough in view of the overall aim and the important challenges or big research questions being addressed. Key intermediate goals may seem similar to a milestone but the traditional MSCA or RIAia projects milestone are related to the achievement of a WP and in an ERC proposal the key intermediate goal is related to the key intermediate stages when results may require adjustment of the project planning in order to achieve the project objectives or answering the research questions presented.

Timescales

Key intermediate goals are converging outcomes of specific objectives/WPs towards the ultimate goal (breakthrough). Analyse the breakthrough versus the significant advancement.

Identify the Breakthrough/Ambition. Explain what of your preliminary data makes you confident in addressing the Big Question behind the breakthrough. Discuss the strategy in terms of identifying the Key intermediate goals (KIG). KIG is where over time you can converge outcomes of specific objectives/WPs towards the ultimate goal (breakthrough). Discuss how these KIGs are pivotal for successfully realizing the synthesis (the integration,

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the Big picture). Provide insight into how adjustments can be made to achieve these goals. Convince the reviewers that the proposal always will be successful even if the breakthrough is in the end not fully feasible. by identifying what ground-breaking results nevertheless can be expected as outcomes of the identified objectives. The key intermediate goals provide a breakdown in time and can therefore function as timescales (not the same as a time schedule or Gantt chart).

In the 2-pages document Resources and PI commitment a second line of arguing the feasibility of the project can be included which is related to the working arrangements and why these are appropriate for achieving the KIGs. This is not a project management discussion but a strategic explanation as to why the team composition is appropriate to work with you in achieving the objectives and therewith the key intermediate goals. Clarify what level of experience your team members need to have in order to work with you on the conduct of the WPs. Is it important to start with a team of high expertise such as postdocs or is it better to start first with a team of PhD students and then later the postdocs step in?

No Milestones – No administrative Deliverables

Milestones and deliverables are typical for the standard Horizon Europe projects where work packages are mandatory. The reason why milestones are not requested in an ERC project is related to the ambitious nature of the ERC proposal. The objective of frontier research as laid down in the work programme is to provide funding for groundbreaking and ambitious research. This was the entire idea of the set up of the ERC programme to provide research with funding to undertake ambitious research and not being bogged down with strict reporting obligations as to how they meet the milestones and deliverables. The idea was and is to provide freedom for researchers to investigate an ambitious question and therefore to allow PI's to deviate from the strategies and methodologies proposed. This thinking made it possible to have only scientific excellence as the overarching evaluation and therefore no evaluation of the implementation therefore no evaluation of milestones or administrative deliverables.

By introducing the concept of key intermediate goals and stages the ERC ensured that the intended freedom for investigation of an ambitious goal was embedded in the review of ERC proposals. It is made explicit in the instructions to the reviewers in the guide for review to avoid aspects not being part of the evaluation criteria since they may provide the applicant the right to redress the evaluation which would slow down the review process.

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4. In conclusion

- Consider the structure: general design where each WP addresses one WP or a more layered design consisting of case studies (application, devices, genres, etc) and WPs running transversal through / over the case studies or any other structure.
- Divide your project in WPs (or any other preferred term) with specific tasks and know how the expected results or outcomes of these WPs converge towards the synthesis of the project findings or results, the breakthrough. Where (WP or specific objective, otherwise) is the synthesis described?
- What are the key intermediate goals relevant for achieving the synthesis, breakthrough and the achievement of the overall project aim advancing significantly science, engineering of scholarship?
- Explain your strategy via the Key Intermediate Goals to achieve the overall aim of the project and the contribution to the ultimate goal resolving the Big Research Question/Challenge beyond your project, Why is this potentially feasible (point to your preliminary evidence and expertise or novel developments).
- There is no need for a Gantt chart. The guide for Reviewers instructs the reviewers not not assess anything that is outside the scope of the evaluation criteria because it may entitle applicants to ask for a re-assessment of their proposal. There is also the issue to consider of limited space therefore only present a rough breakdown of time, timescales, that will allow the reviewer to assess how well placed key intermediate goals can be useful tools to obtain the ultimate goal in the five year duration of the grant.
- Explain what outcomes would already be groundbreaking; being a (very) significant contribution. What value for money is offered to the panel in view of balancing the more certain outcomes (groundbreaking) and ambitious goals (breakthrough)?
- Consider that in each WP (task level or level of the WP overall) feasibility may already have been discussed. Then focus here on the feasibility of achieving the ultimate goal (very ambitious in nature). The feasibility argument may include references to the preliminary evidence discussed in Part I of the Scientific Proposal and of course here in Part II but also it may be important to reference your expertise;

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