

CREATIVE EUROPE - MEDIA

GUIDE FOR EXPERTS

ON

QUALITY ASSESSMENT OF *MEDIA Content Development* APPLICATIONS

managed by the Education, Audiovisual and Culture Executive Agency

Unit B2 – MEDIA

SINGLE PROJECTS – Animation, Creative Documentary and Fiction

Funding method: Lump sums

Quick overlook of the peer review system

- ✚ The assessments are conducted through the Online Expert Evaluation Tool (OEET) where you will find the applications to be evaluated and the evaluation forms.
- ✚ Please assess the projects in the numbering order of the applications starting from the smallest number.
- ✚ Write in English in a manner that the Agency can use your comments for the feedback to the applicants. Provide strengths and weaknesses of the application in your comments.
- ✚ All information must remain confidential and experts are not allowed to contact any applicants.
- ✚ The evaluations must be based on the information given in the application.
- ✚ Be fair, impartial, consistent and accurate.
- ✚ Do not use the first person, i.e. "I think, I find" etc. Explain and justify your comments on a factual basis. Relate them to the information provided in the application.
- ✚ Each project is evaluated by 2 independent experts. Once this stage is concluded, the Agency will open a consolidation phase and the experts will be informed in more detail of their role in this process.
- ✚ Annex I gives more advice on the award criteria and the elements to be taken into consideration in the evaluation.
- ✚ Inform the Agency of any potential conflict of interest as soon as possible.
- ✚ Sign yourself to the Expert community in Ning for more information, questions and discussions.
- ✚ Read carefully this briefing document as well as the technical guides provided to you before starting to work.

1. CREATIVE EUROPE

The cultural and creative sectors embody Europe's immensely rich and diverse cultural heritage, and contribute to the development of our societies. These sectors play a big role in the European economy and help generate growth and jobs.

Creative Europe provides €1.46 billion over seven years to strengthen Europe's cultural and creative sectors.

The programme:

- Safeguards and promotes European cultural and linguistic diversity, and fosters Europe's cultural richness.
- Contributes to Europe's goals for smart, sustainable and inclusive economic growth.
- Helps the cultural and creative sectors to adapt to the digital age and globalisation.
- Opens up new international opportunities, markets and audiences.
- Builds on the success of the MEDIA, MEDIA Mundus and Culture programmes.

Objectives and Priorities

The general objectives of the MEDIA sub-programme of Creative Europe are to strengthen the competitiveness and distribution of the audiovisual industry in Europe and thus contribute to growth and jobs as well as to cultural and linguistic diversity.

The specific objectives include the aim to support the capacity of the European cultural and creative sectors to operate transnationally and internationally; and to promote the transnational circulation of cultural and creative works and transnational mobility of cultural and creative players, in particular artists, as well as to reach new and enlarged audiences and improve access to culture and creative works in the Union and beyond, with a particular focus on children, young people, people with disabilities and under-represented groups.

Within the specific objective of reinforcing the European audiovisual sector's capacity to operate transnationally and internationally, one of the priorities of the MEDIA Sub-programme is to:

- increase the capacity of European audiovisual producers to develop European projects with a the potential to circulate throughout the Union and beyond, and to facilitate European and international co-production.

The MEDIA Sub-programme shall provide support for the following measures:

- the development of European audiovisual works in particular films and television works, such as fiction, documentaries, children's and animated films, as well as interactive works such as videogames and multimedia, with enhanced cross-border circulation potential;
- activities aiming at supporting European audiovisual production companies, in particular independent production companies, with a view to facilitating European and international co-productions of audiovisual works including television works.

Under the **Content Development, Single Project Support scheme**, the applicant submits a proposal with a view to developing a project intended primarily for cinematic release, television broadcasting or commercial exploitation on digital platforms in the following categories: animation, creative documentary and fiction. The funding method is a lump sum and only this sum can be requested by the applicant.

Targeted Projects:

The MEDIA Sub-programme supports European production companies with proven experience interested in developing a Single Project presenting:

- high creative/artistic value and cultural diversity
- wide cross-border potential, ability to reach audiences at European and international levels
- greater cooperation between operators from different countries participating in the MEDIA Sub-programme
- enhanced audience-reach, based on strategies for marketing and distribution envisaged from the development phase.

2. INTRODUCTION

The European Commission's Education, Audiovisual and Culture Executive Agency (Executive Agency) is responsible for the implementation of the Creative Europe Programme. This means that the Executive Agency is in charge of the selection of projects to be funded. The Executive Agency assesses proposals¹ with the assistance of independent experts to ensure that only those of the highest quality are selected for funding. Thus, the final decision on the selection or rejection of applications is taken by the Executive Agency.

This Guide for Experts is a tool for experts when assessing applications submitted under the Creative Europe Programme². It provides instructions and guidance in order to ensure a standardised and high quality assessment of applications for the Programme managed by the Executive Agency.

The Guide for Experts provides information on:

- the role and appointment of experts;
- the principles of the assessment;
- the assessment process in practice;
- information on how to assess the award criteria for each scheme.

3. EXPERTS

3.1 Role of experts

The assessment and selection of grant applications is organised on the basis of a peer review system following a transparent process that guarantees impartiality and equal treatment of all applicants.

The role of experts is very important to provide a fair, impartial, consistent and accurate assessment of project applications according to the objectives of the scheme.

The assessment is an essential part in the selection procedure. Based on the experts' assessment, a list of grant applications per scheme ranked in order of quality is established, which serves as a basis for the Executive Agency to take the grant award decision, following the proposal of the Evaluation Committee composed of representatives from the Agency and the associated Directorate General of the European Commission (CONNECT).

Based on the experts' comments, the Executive Agency provides feedback to the applicants on the quality of their application.

¹ Please note that the terms "proposal" and "application" are used interchangeably in this Guide.

² The Creative Europe Programme was established by the Regulation (EU) No 1295/2013 of the European Parliament and of the Council of 11 December 2013 establishing the Creative Europe Programme and repealing Decisions No 1718/2006/EC, No 1855/2006/EC and No 1041/2009/EC

3.2 Appointment of experts, code of conduct and conflict of interest

Experts are appointed on the basis of their skills and knowledge in the areas and the specific fields of audiovisual industry in which they are asked to assess applications. Experts perform assessments on a personal basis, not as representatives of their employer, their country or any other entity.

To ensure their independence, the names of the experts are not made public.

Experts are required to perform the assessment to the highest professional standards and within the deadline agreed with the Executive Agency.

Through the appointment by the Executive Agency experts are bound to a code of conduct as set out in the appointment letter or contract with the expert.

All information related to the assessment process is strictly confidential. Therefore, experts are not allowed to disclose any information about the applications submitted and results of the assessment and selection to any applicant or to the public.

The assessment of applications will be undertaken by two independent experts, external to the Agency. Experts must not have a conflict of interest³ in relation to the proposals on which they are requested to give their opinion. To this end, they sign a declaration provided by the Executive Agency that no such conflict of interest exists at the time of their appointment and that they undertake to inform the Executive Agency of both the existence and its nature should such conflict arise (cf. template in annex 2 to this Guide). The same declaration binds experts to confidentiality.

Persons involved in an application in the selection round for the scheme under assessment are considered as having a conflict of interest for that selection round and will not be appointed experts.

When a potential conflict of interest is reported by the expert or brought to the attention of the Executive Agency by any means, the Executive Agency will consider the circumstances and decide either to exclude the expert from the assessment of the given application or the whole selection round or allow the expert to take part in the assessment, depending on the objective elements of information at its disposal.

4. ASSESSMENT OF APPLICATIONS

4.1 Preparation for assessment

Before the start of the assessment (remote evaluations off-site), the experts are requested to read the briefing documents provided by the Agency and get access to the Online Evaluation Expert Tool (OEE), in which they perform the assessment using the standard quality assessment forms.

Before starting the assessment of applications, experts must:

³ Financial Regulation Art. 57(2): « ... a conflict of interests exists where the impartial and objective exercise of the functions of a financial actor or other person, ..., is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other shared interest with a recipient.»

- have a sound knowledge of the Creative Europe – MEDIA Development Guidelines which provide all necessary information to potential applicants on the Programme in general and on the schemes they can apply for a grant;
- have an in-depth understanding of the award criteria applicable to the proposals under assessment (cf. Annex 1);
- be familiar with all the reference documents and tools provided by the Executive Agency.

Experts have to read the whole application carefully before completing the quality assessment form. It is recommended to read several applications before assessing any one of them in full: this allows experts to benchmark answers in different sections of the applications.

Each expert works individually and independently, gives scores and comments for each criterion and summarises his/her assessment in the quality assessment form.

4.2 Assessment forms

Experts carry out their assessment in English using the Online Expert Evaluation Tool (OEET). The applications to be assessed as well as the quality assessment forms are accessible through OEET. Experts are provided with technical instructions for the use of OEET by the Executive Agency as part of their briefing.

The standard quality assessment forms are established by the Agency to ensure a coherent assessment of applications across the schemes. Experts examine the issues to be considered under each award criterion, enter their scores for each applicable criterion and provide comments on each award criterion and on the application as a whole. The experts' opinion is quantified in a score and justified by comments on the quality of the application.

On completion of the assessment, experts validate the individual assessment in the Online Expert Evaluation Tool, thereby confirming that they have no conflict of interest with respect to the assessment of that particular proposal.

As part of the quality assessment, experts may be required to provide information on data included in the applications that are collected for statistical and reporting purposes. Experts will have to register this information in OEET.

4.3 Assessment of award criteria and scoring

Experts assess applications only against the award criteria defined in the Guidelines. These award criteria are listed and further explained in Annex 1 of this Guide:

- Annex 1: Award criteria for Single Projects

Each of the award criteria is defined through elements which must be taken into account by experts when analysing an application. These elements form a non-exhaustive list of points to be considered before giving a score for the given criterion. They are intended to help experts reach the final assessment of the criterion in question; however they must not be scored separately.

When assessing applications against award criteria, experts make a judgement on the extent to which applications meet the defined criteria. This judgement must be based on the information provided in the application. Experts cannot assume information that is not explicitly provided.

Information relevant for a specific award criterion may appear in different parts of the application and experts take all of them into account when scoring the award criterion.

An application can receive a maximum of 100 points for all criteria relevant for the action. The table below shows the relative weightings of each criterion per scheme:

Single Projects:

<u>Award criteria</u>	Weightings of award criteria for Single Projects
<u>Relevance and European added-value:</u> Quality of the project and potential for European distribution	50
<u>Quality of the content and activities:</u> Quality of the development strategy	10
<u>Dissemination of project results:</u> The European and international distribution and marketing strategy	20
<u>Organisation of the project team:</u> Distribution of the roles and responsibilities of the creative team vis-à-vis the specific objectives of the proposed action	10
<u>Impact and sustainability:</u> Quality of the financing strategy and feasibility of the project	10
<u>TOTAL</u>	100

Within the maximum number of points per award criterion, ranges of scores are defined that correspond to a fixed definition of the expected quality standard so that as coherent approach as possible is implemented, across experts as well as across schemes. The score cannot include decimals. The standards are as follows:

- 9-10 Very good – the application addresses all relevant aspects of the criterion in question convincingly and successfully. The answer provides all the information and evidence needed and there are no concerns or areas of weakness.
- 7-8 Good – the application addresses the criterion well, although some small improvements could be made. The answer gives clear information on all or nearly all of the evidence needed.
- 5-6 Acceptable – the application broadly addresses the criterion, but there are some weaknesses. The answer gives some relevant information, but there are areas where detail is lacking or the information is unclear.

- 3-4 Fair – the application addresses the criterion, but there are many weaknesses. The answer gives some relevant information, but there are several areas where detail is lacking or the information is unclear.
- 1-2 Very weak – the application fails to address the criterion or cannot be judged due to missing or incomplete information. The answer does not address the question asked, or gives very little relevant information.
- 0 No evidence –the application fails to include a minimum amount of evidence to enable the criterion to be evaluated.

N.B. Although indicated on the scoring scale, experts should avoid "0" which relates to "no evidence". If experts want to score a "0" to a given criterion, experts should notify the agency staff à priori.

Experts are expected to give comments on each award criterion and, in their comments, refer explicitly to the elements of analysis under the relevant criterion. The comments on each award criterion have to reflect and justify the score given for it.

At the end of the assessment, experts give overall comments on the application as a whole. In the comments, experts must provide a thorough analysis of the application highlighting its relative strengths and weaknesses.

As their comments will be used by the Executive Agency to provide feedback to applicants, experts must pay particular attention to clarity, consistency and appropriate level of detail.

The Executive Agency monitors the quality of expert assessments and can require the expert to revise the assessment should the necessary and expected quality standard not be met.

Experts must assess all applications in full, regardless of the score given to any award criterion.

4.4 Possible problems with applications

Experts are under no circumstances allowed to contact applicants directly. In case of any problems arising during the assessment, experts contact the staff of the Executive Agency. The Executive Agency decides whether the applicant will be asked to provide additional information or clarifications or if the application should be assessed in the form it was submitted.

4.5 Consolidated assessment and final score

At the first stage of assessments, the role of expert 1 and expert 2 are identical. Both experts do their assessment individually and submit the evaluation through the online Expert evaluation Tool.

Once an application has been assessed by the two experts, the two individual assessments will be consolidated in order to arrive at the final score and comments for the application. The consolidation is an integral part of the tasks of the expert and must be done for each application.

After the submission of the two individual assessments, the Agency will open in the OEET the consolidation phase. The expert 1 of the individual assessors has a role of a validator of the

consolidated evaluation report. The consolidation takes either a form of a technical validation of the report in OEET (convergent evaluations) or a consultation between the two individual experts and a consolidation of the report in the online tool (divergent evaluations).

If the two experts' positions are too distant for an agreement to be reached, the Executive Agency will decide on the need of an independent assessment by a third expert. The final score will then be determined by the two assessments that are closest in terms of their overall score and the most extreme assessment in terms of overall score is not taken into account for the consolidated assessment. Consolidation of the individual assessments follows the same rules as explained above.

The consolidated assessment is considered as the final assessment of a given application. It means that the consolidated assessment forms the basis for ranking the application on the list of eligible grant applications.

5. Feedback to applicants

As explained in the Guidelines, the Executive Agency notifies the applicant in writing of the selection result once the grant award decision is taken, providing the relevant information on the quality assessment scores and comments. Therefore it is very important that the experts write the comments in a manner that the Agency can use them to inform the applicants about the results of the individual applications.

In case of a request for further information or appeal by an applicant, the Executive Agency may request the expert involved in the assessment to provide additional elements of information on the assessment as necessary.

6. Expert Fees

The experts are remunerated on a daily basis. The daily fee is 450 € as indicated in the expert contract.

The development Single Project applications are organised in packages to be remunerated the following way:

Genre of the application	N° of applications in the package	N° of daily fees	Total fee for the package
Animation	3	1	450 €
Creative Documentary	3	1	450 €
Fiction	5	2	900 €

Annexes:

1. Award criteria for Single Projects
2. Template for the Declaration of absence of conflict of interests and of confidentiality

Single Projects (method of funding – Lump Sums)

AWARD CRITERIA	General interpretation of award criteria relevant for all projects	Weighting of the criterion	Elements of analysis of the award criteria
Relevance and European added-value	1. Quality of the project and the potential for European distribution	Total 50	
	Fiction and animation: 1a) Quality, premise, strength and distinctiveness of idea and dramatic potential of the project Creative documentary: 1a) Strength and distinctiveness of the subject matter, purpose and quality of the project focus	10	<ul style="list-style-type: none"> • originality • premise, strength, distinctiveness of idea and dramatic potential of the project • Strength and distinctiveness of the subject matter, • purpose and quality of the project focus
	1b) Quality of the writing, narrative choices, character development and the world of the story	10	<ul style="list-style-type: none"> • Quality of the writing, • narrative choices and character development • the world of the story
	Fiction and Creative documentary: 1c) Creative potential of the project Animation: 1c) Quality of the visual approach and art work as well as the creative potential of the project	10	<ul style="list-style-type: none"> • specific approach suggested • the likelihood to succeed due to artistic qualities • visual approach

	1d) Potential of the European and International distribution	10 (weight 2)	<ul style="list-style-type: none"> • transnational appeal of the project concept <ul style="list-style-type: none"> ○ subject • potential to cross borders taking into account <ul style="list-style-type: none"> ○ the team, ○ the cast, ○ the proposed execution and the strategies and collaboration methodology presented, especially with non-national co-production partners
Quality of the content and activities	2. Quality of the development strategy	10	<ul style="list-style-type: none"> • adequacy of the development plan and development budget to the needs of the project, • sufficiency of detail, • adequacy of development schedule planned
Dissemination of project results	3. The European and international distribution and marketing strategy		
	3a) The European and international distribution strategy	10	<ul style="list-style-type: none"> • Relevance of the distribution strategy regarding <ul style="list-style-type: none"> ○ the identified target audience, ○ distribution methods foreseen, ○ partners in place or envisaged ○ awareness of the markets, European/international vision ○ relevance of choice of territories

			<p>(neighbouring countries and regions, Europe, other continents)</p>
	3b) The European and international marketing strategy	10	<ul style="list-style-type: none"> • relevance of the marketing strategy in terms of <ul style="list-style-type: none"> ○ the distribution strategy, ○ segments targeted, ○ unique selling points, ○ the marketing channels, ○ the benefits to the selected market, ○ the promotional activities planned ○ Adequacy of the communication and marketing plan & tools
Organisation of the project team	4. Distribution of the roles and responsibilities of the creative team vis-à-vis the specific objectives of the proposed action	10	<ul style="list-style-type: none"> • distribution of the roles and responsibilities to the different members of the creative team • adequacy of the team to the project • potential for further talent escalation
Impact and sustainability	5. Quality of the financing strategy and feasibility of the project	10	<ul style="list-style-type: none"> • Level of commitment (Letter of Intent versus deal-memo or contract) and share of non-national funding, especially from countries with a different language • awareness of the suitable potential partners and territories targeted • experience or ability of the applicant to secure the necessary co-financing • sufficiency and realism of the financing plan

			<ul style="list-style-type: none">• adequacy of the production costs to the project and to the development budget described• adequacy of the financing strategy of the project compared to the estimated production costs
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Education, Audiovisual and Culture Executive Agency

Declaration of absence of conflict of interests and of confidentiality

Title of Call for proposals: [replace this text]

Reference: Call for proposal [include reference here]

I. Conflict of interests

I, the undersigned [Surname, family name], having been appointed as an expert for the abovementioned call, declare that I am aware of Article 57 of the Financial Regulation, which states that:

"1. Financial actors and other persons involved in budget implementation and management, including acts preparatory thereto, audit or control shall not take any action which may bring their own interests into conflict with those of the Union.

Where such a risk exists, the person in question shall refrain from such action and shall refer the matter to the authorising officer by delegation who shall confirm in writing whether a conflict of interests exists. The person in question shall also inform his or her hierarchical superior. Where a conflict of interests is found to exist, the person in question shall cease all activities in the matter. The authorising officer by delegation shall personally take any further appropriate action.

2. For the purposes of paragraph 1, a conflict of interests exists where the impartial and objective exercise of the functions of a financial actor or other person, as referred to in paragraph 1, is compromised for reasons involving family, emotional life, political or national affinity, economic interest or any other shared interest with a recipient."

I hereby declare that I do not fall under any of the following circumstances in which a conflict of interests might exist. I confirm that, if I discover before or during the evaluation that a conflict of interests exists, I will declare it immediately to the Agency.

1/Disqualifying conflict of interests:

- Involvement in the preparation of the proposal;
- Direct benefit in case of acceptance of the proposal;
- Close family relationship with any person representing a participating organisation in the proposal;
- Director, trustee or partner of a participating organisation;
- Current employment by a participating organisation;

- Current involvement in a contract or collaboration with a participating organisation;
- Any other situation that compromises my ability to evaluate the proposal impartially.

2/Potential conflict of interests:

- Employment by one of the participating organisation within the previous three years;
- Involvement in a contract or collaboration with a participating organisation within the previous three years;
- Any other situation that could cast doubt on my ability to evaluate the proposal impartially, or that could reasonably appear to do so in the eyes of a third party (*Ex. Past or current personal relationships, nationality, political affinity, etc.*).

I hereby declare that I fall under one or more of the above circumstances (please specify which and explain) ^{*}:

**Ex. In case of employment by a structure including different departments or institutes, please specify the*

degree of autonomy between them.

I hereby declare on my honour that the disclosed information is true and complete to the best of my knowledge.⁴

II. Confidentiality and personal data protection

I also confirm that I will keep all matters entrusted to me confidential and will process the personal data I receive only for the purposes of the performance of the present evaluation. If unnecessary or excessive personal data are contained in the documents submitted by the applicant, I will not process them further or take them into account for the evaluation of the proposal. I will not communicate outside the panel any confidential information that is revealed to me or that I have discovered. I will not make any adverse use of information given to me.

Signed:

Date/Place:

Name (in capitals):

⁴ In case of false, incomplete or incorrect statements or failure to provide information in an attempt to obtain the contract or any benefit resulting therefrom, or where this was the effect of the action, this constitutes a breach of the contract between the Agency and the expert. The Agency may decide to terminate the contract and to recover any sums paid to the Contractor under the order (cf. Article 8 of the General Conditions).