Evaluating proposals in the age of AI

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AI is changing proposal evaluation, but how?

- Growing proposal numbers and pressure on the evaluation system.
- New opportunities to navigate, summarise and compare information.
- New questions about fairness, consistency and human judgement:
  - Can these tools help us improve the quality of evaluation, or will they simply help us process more proposals in less time?
  - Can they introduce new biases or influence the independent judgement of experts?
- How can AI help us evaluate proposals without compromising the **quality, fairness and integrity** of the process?

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Where could AI add value?

- **Finding information:** Navigating long proposals, locating relevant passages and checking references.
- **Organising information:** Summarising content, clustering themes and identifying relationships across proposals.
- **Supporting the process:** Assisting administrative tasks, quality checks and consistency monitoring

We need to ask not only what AI can do, but also whether it does it well enough to be useful in a real evaluation environment.

Supporting judgement, or shaping it?

AI supports the expert

- Finds relevant evidence
- Helps navigate complex documents
- Assist with administrative checks

AI shapes the assessment

- Interprets scientific merit.
- Influences scores or rankings.
- Recommends funding decisions.

- **Not clear boundary**. Even without making the final decision, AI can influence the judgement. Does the human retain the ability to exercise independent and informed judgement? (i.e. AI generated summary).
- **Where should we draw the line?** Which tasks can AI support, and which should remain exclusively human led?

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The hidden risks: what can go wrong?

- **Bias and homogenisation:** Unconventional ideas or unfamiliar research approach may be misrepresented or undervalued.
- **Overreliance and false confidence:** A fluent summary can contain omissions or errors, while appearing authoritative.
- **Lack of transparency:** It may be difficult (impossible?) to understand how AI has influenced an assessment.
- **Confidentiality:** Unpublished results, original ideas and proposal content must be protected.

Challenge: to identify what can go wrong when we rely on these tools. It is not only about technical performance or saving time. We need to consider their effects on fairness, scientific judgement and trust in the eval process.

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Responsible use of AI requires more than human oversight

- **Human responsibility:** Independent judgement, critical review and accountability.

Organisations

- **Data protection:** Confidentiality, secure tools and appropriate data handling.
- **Clear rules and training:** Understandable guidance and consistent implementation.
- **Validation and monitoring:** Evidence of reliability, audits and correction of problems

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The European Commission's approach (1/2)

- Guidance note "*Instructions for the use of AI tools by experts*".
- Experts must perform the core tasks themselves (not delegation).

Core valuation tasks

- Read and understand the full proposal
- Assess scientific merit and form independent judgements
- Decide what is relevant and formulate the evaluation

Limited supporting tasks

- Language, grammar and style polishing.
- Translation of expert's report.
- Background research on relevant topics

Confidentiality is essential: Proposal content must not be uploaded to AI tools, including internal systems.

The European Commission’s approach (2/2)

- These uses remain under the expert's responsibility and **must be documented** and made available to the contracting authority upon request.
- The question is not simply whether an AI tool is technically secure or accurate. We also need to consider what task it is performing, whether it replaces work that the expert is required to do personally, and whether it respects confidentiality.

What is next?

Three priorities for responsible AI use in proposal evaluation

- **Define the boundaries** (Where can AI help, and where must human judgement remain central?)
- **Build the evidence** (How do we know AI improves evaluation rather than simply making it faster?)
- **Protect trust** (How do we ensure fairness, confidentiality and accountability?)

These are starting points for a discussion that needs to involve researchers, evaluators, funding organisations and policymakers.

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What is next?

What is the single most important action that research funders, policymakers or research institutions should take today to ensure responsible AI use in proposal evaluation?

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Thank you

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One challenge, different institutional realities

Three questions for funding organisations:

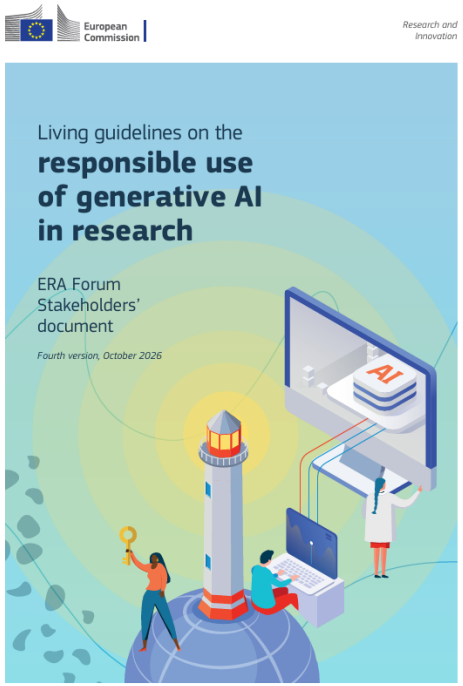
- **Common boundaries:** Which uses of AI should be acceptable across evaluation systems?
- **Common safeguards:** What minimum standards should apply to confidentiality, transparency and accountability?
- **Room for experimentation:** How can organisations test new tools while preserving trust and fairness?

Valuable outcome: Understanding of where we already agree, where our approaches differ, and which practices could be usefully be shared across Europe.

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Alignment with the ERA Forum guidelines

- Open to responsible AI use in proposal preparation, while safeguarding human judgement, confidentiality and fairness in evaluation.



The guidelines are built on key principles of research integrity:

- **Accountability:** Researchers remain fully responsible for the accuracy, reliability, and ethical standards of their work, even when AI tools are used.
- **Transparency:** Any use of AI must be clearly documented and disclosed, including the extent of AI involvement in drafting, summarising, or analysing research materials.
- **Responsibility:** AI should assist, not replace, human decision-making in methodology, evaluation, and final judgments.

Our AI tools in the application process -EC

- Following analysis of business value vs technical feasibility, different use cases:
  - **Allocation of expert's evaluators to proposals** (next: improve search of experts)
  - **Similarity checks** to detect:
    - Proposals/projects: plagiarism, double funding, re-submissions
    - Participants: high risk suppliers and EU Restricted Measures
  - **Other ideas**:
    - Automatic pre-screenings (ethics,..)
    - Automatic generation of summaries/reports (individual reports, consensus reports, redress..) and quality checks of reports.

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