Horizon 2020
Marie Skłodowska-Curie Actions

Innovative Training Networks (ITN) 2019 Call for proposals

Key features

- High-impact research output
- A link between business, research and higher education
- For all career stages
- Benefits society
- Good working conditions
- Open to the world
- International mobility
- Inter-sectoral mobility
- Bottom-up approach
- Interdisciplinarity
- Expands scientific knowledge
- Hosts in any country or sector
- Informing decision-makers

All domains of RESEARCH AND INNOVATION

European Commission | Research Executive Agency
UKRO & MSCA UK Help Desk
About UKRO

Mission

• To maximise UK engagement in EU-funded research, innovation and higher education activities

Our office

• Based in Brussels
• European office of the UK Research Councils
• Delivers subscription-based advisory services for around 150 research organisations in the UK and beyond
• Also provides National Contact Point services on behalf of the UK Government
UKRO National Contact Points

• Advice on the European Research Council and the Marie Skłodowska-Curie Actions

• Websites
  – www.ukro.ac.uk/erc
  – www.ukro.ac.uk/mariecurie

• Helpdesk
  – erc-uk@bbsrc.ac.uk; Phone: 0032 2289 6121
  – mariecurie-uk@bbsrc.ac.uk; Phone: 0032 2230 0318

• Follow UKRO NCPs on social media

• Funded by
  Department for Business, Energy & Industrial Strategy
Exit negotiations
UK participation in MSCA ITN 2019 Call
• Sets out political agreement
• Financial settlement + participation in Horizon 2020 and other EU programmes
• UK participants eligible to bid for Horizon 2020 calls and uninterrupted flow of funding for lifetime of projects.

• Translates the agreement of the Joint Report into legal text
• Aim is to reach an agreement on the final text in the autumn.

• June 2018: Welcomed progress on finalising Withdrawal Agreement
• 17 October:
“We expect max. progress and results in the Brexit talks. Then we will decide whether conditions are there to call an extraordinary summit in November to finalise and formalise the deal.”
Brexit Deal Scenario

• **Joint Report** EU negotiators/UK Government (8 December 2017) – financial settlement

  “Following withdrawal from the Union, the UK will continue to participate in the Union programmes financed by the MFF 2014-2020 until their closure.”

• **This means that UK entities should have continued eligibility to participate in Horizon 2020** as one of the programmes financed by the MFF (EU Budget)

• Technical details to be established during the negotiation

• **Nothing is agreed until everything is agreed**
European Commission

• Statement 4 July 2016: "until the UK leaves the EU, EU law continues to apply to and within the UK, both when it comes to rights and obligations. This includes the eligibility of UK legal entities to participate and receive funding in Horizon 2020 actions."

• The Commission explicitly briefs evaluators in their guidance: “Experts should not evaluate proposals with UK participants any differently than before.” (http://ec.europa.eu/research/participants/data/support/expert/h2020_expert-briefing_en.pdf)
The Commission explicitly covers the outcome of the UK referendum in the guidance for evaluators:

Should project coordinators of Horizon 2020 proposals dedicate a part of their proposal to addressing the potential risks as a consequence of the UK Referendum?

No. At this stage, any speculation on the consequences for the Horizon 2020 action of a withdrawal of the UK from the EU will not be taken into account in the evaluation.

Related FAQ:

UK Government key messages and Q&A

- Government Horizon 2020 Q&A published in March 2018, update in August 2018
- UKRO works closely with BEIS – many queries from the community included
- Key messages:

  Until the date when the UK leaves the EU, it remains a Member State, with all the rights and obligations that entails. This means that UK entities are eligible to participate in all aspects of the Horizon 2020 programme while we remain a member of the EU.

  The Government’s priority remains ensuring the draft Withdrawal Agreement is finalised. This would mean that UK Horizon 2020 participants and projects would be unaffected by EU exit.

  The Government’s Underwrite Guarantee and the Post EU Exit Guarantee Extension remain in place in the event that commitments made in the Joint Report are not met.
UK Government Underwrite Guarantee

Guarantees EU Funding for UK researchers beyond the date the UK leaves the EU:
"where UK organisations bid directly to the European Commission on a competitive basis for EU funding projects while we are still a member of the EU, for example universities participating in Horizon 2020, the Treasury will underwrite the payments of such awards, even when specific projects continue beyond the UK’s departure from the EU”

- Applies to proposals submitted before the UK formally exits.
- The UK expects that the underwrite guarantee will not be needed, as the intention is to successfully conclude the Withdrawal Agreement.
- This remains valid until a formal deal has been reached.

ITN call deadline: 15 January 2019
Follow UKRO for Brexit Updates

www.ukro.ac.uk/Documents/factsheet_brexit.pdf?pubdate=20180843
Marie Skłodowska-Curie Actions (MSCA)

Policy background, schemes overview
Excellent Science
30% of total H2020 budget
Objective: to strengthen the excellence of European research
• New research and ideas are drivers of competition
• Attract and retain high potential individuals
• Fund the most talented and creative researchers
• Develop and maintain world-class research infrastructures

Societal Challenges
Health and Wellbeing
Food security
Transport
Energy
Climate action
Societies
Security

Widening Participation; Science with and for Society, Mainstreaming of Social Sciences and Humanities (SSH) and ICT, Fast Track to Innovation

European Institute of Innovation and Technology (EIT)
EUROATOM
Joint Research Centre (JRC)
“...contribute to excellent research, boosting jobs, growth and investment by equipping researchers with the new knowledge, skills and international and intersectoral exposure to fill the top positions of tomorrow and solve current and future societal challenges...based on the principle of mobility...open to researchers and innovation staff at all stages... ensuring good working conditions and work/life balance...”

- Have a structuring effect on the European Research Area through trans-national and inter-sectoral mobility to create a European labour market for researchers

- Strengthen human potential by:
  - Encouraging people to become researchers
  - Encouraging researchers to carry out their research in Europe
Marie Skłodowska-Curie Actions

- Operates in a ‘bottom-up’ basis
- For any research and innovation ideas (basic research; market take-up)
- **Mobility** (cross-border and cross-sector) is a key requirement
- Aim to enhance skills of people behind research and innovation
- Strong participation across sectors
- Dissemination and **public engagement** - public outreach activities
- Gender balance – equal opportunities in the research content
Marie Skłodowska-Curie Actions

- **Innovative Training Networks (ITN)**
  - For Early Stage Researchers

- **Individual Fellowships (IF)**
  - For Experienced Researchers

- **Research and Innovation Staff Exchange (RISE)**
  - Exchange visits (secondments) of staff

- **Co-funding of programmes (COFUND)**
  - For regional, national, international doctoral or fellowship programmes
Objective
“to increase complementarity between European and national levels of support for researchers at risk, through sharing best practice and acquiring new skills.”

Expected Impact
Long term; Development of a support network for researchers at risk across Europe.
For this call; Delivery of initial training and skills development, while also mapping currently available national/EU programmes.

- Call Currently Open – closes 4 December 2018
- Coordination and Support Action
- €1.5 Million available – aims to fund one project for 3 years
# MSCA calls – 2018/19 Call Timetable

<table>
<thead>
<tr>
<th>Call identifier</th>
<th>Publication date</th>
<th>Deadline</th>
<th>Call budget €M</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSCA-ITN-2018</td>
<td>12 October 2017</td>
<td>17 January 2018</td>
<td>442</td>
</tr>
<tr>
<td>MSCA-RISE-2018</td>
<td>7 December 2017</td>
<td>18 April 2018</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-RISE-2019</td>
<td>4 December 2018</td>
<td>3 April 2019</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-IF-2018</td>
<td>12 April 2018</td>
<td>12 September 2018</td>
<td>278</td>
</tr>
<tr>
<td>MSCA-IF-2019</td>
<td>11 April 2019</td>
<td>11 September 2019</td>
<td>300</td>
</tr>
<tr>
<td>MSCA-COFUND-2018</td>
<td>12 April 2018</td>
<td>27 September 2018</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-COFUND-2019</td>
<td>4 April 2019</td>
<td>26 September 2019</td>
<td>90</td>
</tr>
<tr>
<td>MSCA Researchers’ Night</td>
<td>7 November 2017</td>
<td>13 February 2018</td>
<td>12</td>
</tr>
<tr>
<td>MSCA-RR-2018</td>
<td>4 September 2018</td>
<td>4 December 2018</td>
<td>1.5</td>
</tr>
</tbody>
</table>
Who is eligible for funding?

The 28 EU Member States:

- Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom
Who is eligible for funding?

• Overseas Countries and Territories (OCT) linked to the Member States
  – Anguilla, Aruba, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Curaçao, Falkland Islands, French Polynesia, Greenland, Montserrat, New Caledonia, Pitcairn Islands, Saba, Saint Barthélémy, Saint Helena, Saint Pierre and Miquelon, Sint Eustatius, Sint Maarten, Turks and Caicos Islands, Wallis and Futuna

• 16 Associated Countries:
  – Norway, Iceland, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine Tunisia, Armenia and Georgia.

• ‘Third countries’ (their eligibility for EU funding depends on their GDP; only countries mentioned in Annex A to the WP are eligible to automatically receive H2020 funding)
Third countries – eligibility and funding

- Only countries mentioned in Annex A of the Horizon 2020 Work Programme are automatically eligible for EU funding.

- Developed and developing economies, such as the USA, Canada, Australia, New Zealand, Brazil, Russia, India, China and Mexico don’t automatically qualify for EU funding.

**Exceptionally, funding provided in following cases:**

- Under the existence of a bilateral agreement for funding;
- When Commission deems participation essential to success of project due to its: outstanding competence/expertise; access to research; infrastructure; access to particular geographical environments; and access to data.

ITN Evaluators would need to endorse each exceptional case.

- It is therefore recommended that such organisations participate in ITNs as Partner Organisations.
Innovative Training Networks (ITN)

Overview
Innovative Training Networks (ITN) Overview

Main EU programme for structured doctoral training

- Dedicated to early-stage researchers (ESR)
- Broad partnerships to include both the academic and non-academic sectors

3 modes:

- European Training Networks (ETN)
- European Industrial Doctorates (EID)
- European Joint Doctorates (EJD)

Objectives

- Raise **excellence** and structure research and doctoral training;
- Train a new generation of **creative, entrepreneurial** and **innovative** early-stage researchers;
- Facilitate **triple 'i'** dimension of mobility: **international, interdisciplinary, intersectoral**;
- Create knowledge triangle: **research, education, innovation**: innovation skills / **employability**;
- Exchange of **best practice** amongst participating organisations.
Key Information

- **MSCA 2018-2020 Work Programme**
  - Introduction and Call description (Objective, Scope, Expected impact)
  - Links to:
    - “European Charter for Researchers and Code of Conduct for the Recruitment of Researchers”
    - “EU Principles for Innovative Doctoral Training”

- **Guide for Applicants** and FAQ

- Previously funded [ITN projects](#) in the CORDIS database.

- For EJD, information on the processor programme [Erasmus Mundus Joint Doctorates](#)
Policy context

The Human Resources Strategy for Researchers

The ‘HR Strategy for Researchers’ supports research institutions and funding organizations in the implementation of the Charter & Code in their policies and practices.

The implementation of the Charter & Code principles by research institutions render them more attractive to researchers looking for a new employer or for a host for their research project.

The European Commission recognizes with the ‘HR Excellence in Research Award’ the institutions which make progress in aligning their human resources policies to the 40 principles of the Charter & Code, based on a customized action plan/HR strategy.

Download the HRS4R procedure chart (52.79 KB)

Principles for Innovative Doctoral Training

1. Research Excellence

   Striving for excellent research is fundamental to all doctoral education and from this all other elements flow. Academic standards set via peer review procedures and research environments representing a critical mass are required. The new academic generation should be trained to become creative, critical and autonomous intellectual risk takers, pushing the boundaries of frontier research.

2. Attractive Institutional Environment

   Doctoral candidates should find good working conditions to empower them to become independent researchers taking responsibility at an early stage for the scope, direction and progress of their project. These should include career development opportunities, in line with the Europen Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.3.

3. Interdisciplinary Research Options

   Doctoral training must be embedded in an open research environment and culture to ensure that any appropriate opportunities for cross-fertilisation between disciplines can foster the necessary breadth and interdisciplinary approach.

4. Exposure to industry and other relevant employment sectors

   The term ‘industry’ is used in the widest sense, including all fields of future workplaces and public engagement, from industry to business, government, NGO’s, charities and cultural institutions (e.g. museums). This can include placements during research training: shared funding; involvement of non-academics from relevant industry in informing-delivering teaching and supervision; promoting financial contribution of the relevant industry to doctoral programmes; fostering alumni networks that can support the candidate (for example mentoring schemes) and the programme, and a wide array of media/technology/knowledge transfer activities.

In 2005, the European Commission adopted a European Charter for Researchers and a Code of Conduct for the Recruitment of Researchers. The two documents, addressed to researchers as well as research employers and funders in both the public and private sectors, are key elements in the EU's policy to boost researchers' careers. Sets out 40 principles regarding research careers.

The MSCA, including ITNs, fully support the Charter and Code.

So far, almost 900 organisations have endorsed them.

For the UK, the EU recognises those organisations that endorse the Vitae Concordat to Support the Career Development of Researchers by default adopt the EU Charter and Code.
MSCA Work Programme 2018-20

Updates relevant to ITN (compared to WP 2016-17)

- Emphasis of MSCA's contribution to the United Nation's Sustainable Development Goals (UN SDG). *Note: the scheme remains entirely bottom-up*

- EJD – requirement to ensure at least 2/3 of researchers are enrolled in a joint, double or multiple degree within Europe, i.e. between 2+ organisations established in EU MS or AC

- EJD – template for letter of commitment now available (Annex 6)

- EID – relaxed international requirement for inter-sectoral secondments (20% must be international)

- There will optional *introductory training offered to all MSCA beneficiaries* through an online training module and explanatory videos

- Living allowance rates increased by 5% to **€3,270**

- Secondments of 6 months or less with mobility must be financed by Research, Training and Networking costs in to prevent an unreasonable financial burden for the ESRs

- Introduction of *new Special Needs Allowance* open to all MSCA schemes (available from 2019)

- Correction coefficients updated, the UK's is now **139.83%** from 120.3%

Reading the **MSCA Work Programme** is a great start of writing an ITN proposal
## Key MSCA ITN Definitions

<table>
<thead>
<tr>
<th>Early Stage Researcher (ESR)</th>
<th>At the time of recruitment (ITN) by the host organisation, must be in the first 4 years (full-time research experience) of their research careers and have not been awarded a doctoral degree</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Academic sector</strong></td>
<td>Includes universities and higher education institutions (public and private) awarding degrees, non-profit research institutions (public and private), and international European interest organisations</td>
</tr>
<tr>
<td><strong>Non-academic sector</strong></td>
<td>Includes any socio-economic actor not included in the academic sector</td>
</tr>
</tbody>
</table>
Mobility Rule in ITN

Researchers must not have resided or carried out their main activity in the country of the recruiting beneficiary for **more than 12 months in the 3 years immediately before the recruitment date**.

For international European interest organisations, international organisations, the European Commission's Joint Research Centre (JRC) or an 'entity created under Union law', recruited researchers must not have spent more than 12 months in the 3 years immediately before the recruitment date at the same appointing organisation.

No restrictions on nationality!
## Innovative Training Networks (ITN) Overview

<table>
<thead>
<tr>
<th>Implementation Mode</th>
<th>Country of beneficiaries</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETN</td>
<td>Minimum: 3 different countries: MS or AC</td>
</tr>
<tr>
<td>EID</td>
<td>Minimum: 2 different countries: MS or AC</td>
</tr>
<tr>
<td>EJD</td>
<td>Minimum: 3 different countries: MS or AC</td>
</tr>
</tbody>
</table>

Additional beneficiaries can be established in MS, AC or TC included in the list of countries eligible for funding provided in General Annex A to the Work Programme (see TC exceptional cases below).

Partner organisations can be established anywhere in the world.

### 40% budget rule

For all ITN (except for EID with two beneficiaries), **no more than 40.0%** of the total EU financial contribution may be **allocated to beneficiaries in the same country** or to any one international European interest organisation or international organisation. This concerns the total amount of the budget allocated to a country and not the number of person-months.
Types of ITN; European Training Networks (ETN)
Average size: **6-10** beneficiaries (+as many partners as required)

- Expectation of beneficiaries from both academic and non-academic sectors
- Each beneficiary recruits and hosts **at least one ESR**
- **ESR contract length**: 3-36 months (project length up to 48 months)
- ESR can spend up to **30%** of their contract period on secondment(s)
- Enrolment on doctoral programme **not** mandatory, but if planned PhD awarding bodies **must** be at least Partner organisations
- Joint supervision **encouraged**
ETN – minimum set-up

40% budget rule applicable

Max. 540 researcher months
(15 ESRs on 36 month contracts)
ETN – minimum set-up

40% budget rule applicable

Max. 540 researcher months
(15 ESRs on 36 month contracts)
Types of ITN;
European Industrial Doctorates (EID)
ITN – European Industrial Doctorates (EID)

• **Mandatory** non-academic beneficiary - “...preferably enterprise...”

• ESRs **must be enrolled on a doctoral programme**
  
  – “should none of the academic beneficiaries be entitled to award a doctoral degree an institution entitled to award a doctoral degree **must** be associated as a **partner organisation**”

• Research must be in the area of the doctoral programme and should aim to **support long-term, industry-oriented research**

• Mandatory **joint selection, training** and ESR **supervision** by both sectors

• **ESR contract length: 36 months expected**, can be split between beneficiaries (check mobility rules and salary implications)
ITN – European Industrial Doctorates (EID)

• ESRs must spend at least **50%** of their time in the non-academic sector:
  - at least 20% inter-sectoral mobility must be international

• This inter-sectoral mobility **must be between participating organisations located in different countries**.

• Secondments to partner organisations (irrespective of sector) possible in line with the proposal and limited to 30% of the time

• New EID specific table in Section 4 of Part B2 of the proposal to check compliance with EID requirements
EID – Minimum Set-up (2 Beneficiaries)

Max. 180 researcher months (5 ESRs on 36 month contracts)

Country 1
MS/AC
Academic

Country 2
MS/AC
Non-Academic

≥ 50% Time

40% budget rule not applicable
EID – Minimum Set-up (2 Beneficiaries)

Max. 180 researcher months (5 ESRs on 36 month contracts)

40% budget rule not applicable
EID – 3+ beneficiaries

Max. 540 researcher months (15 ESRs on 36 month contracts)

40% budget rule applicable
EID – 3+ beneficiaries

Partner Organisation(s)
- Academic
- Non-Academic

Country 1 MS/AC
- Academic

Minimum Set-Up, EID 3+ Beneficiary

Country 2 MS/AC
- Non-Academic

Country 3 MS/AC
- Academic or Non-Academic

Max. 540 researcher months
(15 ESRs on 36 month contracts)

40% budget rule applicable
Types of ITN; European Joint Doctorates (EJD)
ITN – European Joint Doctorates (EJD)

- Creation of **coherent joint doctoral programmes** that deliver joint, double or multiple degrees

- **Recommended size**: 4-8 beneficiaries

- Ambition for **lasting doctoral-level cooperation** between the beneficiaries

- Mandatory doctoral enrolment,

- Joint selection, supervision, monitoring and assessment of ESRs through a **joint governance structure**

- **ESR contract**: 36 months expected

- ESR likely to split their stay between beneficiaries to fulfil joint doctoral programme requirements, secondment limit of 30% of time not applicable
EJD - degree options

- **Single diploma** issued by at least two HEIs offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located.

- **Two or more separate national diplomas** issued by two or more HEIs and recognised officially in the countries where the degree-awarding institutions are located.

- The final degree must be awarded by institutions from at least two different countries.
- At least two-thirds of the supported ESRs must be enrolled in a joint, double or multiple degree within EU MS/AC.
EJD – minimum set-up

Participation of Non-Academic sector is essential

Minimum **two-thirds** must be **enrolled** in a joint, double or multiple degree within EU MS/AC

Max. 540 researcher months (15 ESRs on 36 month contracts)
EJD – minimum set-up

Participation of Non-Academic sector is essential

Minimum two-thirds must be enrolled in a joint, double or multiple degree within EU MS/AC

Max. 540 researcher months (15 ESRs on 36 month contracts)

Ability to award Joint, Double or Multiple Doctoral Degrees.
## Summary – Different modes of ITN

<table>
<thead>
<tr>
<th></th>
<th>ETN</th>
<th>EID</th>
<th>EJD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beneficiaries</strong></td>
<td>≥3 from 3 diff. MS/AC</td>
<td>≥2 from 2 diff. MS/AC: (≥1 academic + ≥1 non-academic)</td>
<td>≥3 (acad. award PhD) from 3 diff. MS/AC</td>
</tr>
<tr>
<td><strong>Person-months</strong></td>
<td>Max. 540</td>
<td>Max. 180 / 540</td>
<td>Max. 540</td>
</tr>
<tr>
<td><strong>Researchers</strong></td>
<td></td>
<td>ESRs only (3-36 months)</td>
<td></td>
</tr>
<tr>
<td><strong>Partner Organ.</strong></td>
<td>Unlimited (any country / sector / discipline)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>PhD enrolment</strong></td>
<td>typically expected</td>
<td>mandatory</td>
<td>mandatory</td>
</tr>
<tr>
<td><strong>Non-academic participation</strong></td>
<td>essential</td>
<td>mandatory</td>
<td>essential</td>
</tr>
<tr>
<td><strong>Inter-sectoral exposure</strong></td>
<td>possible through secondments</td>
<td>≥50% in non-academic International (for beneficiaries)</td>
<td>possible through secondments</td>
</tr>
<tr>
<td><strong>Panels and rank lists</strong></td>
<td>8 panels: CHE, ECO, ENG, ENV, LIF, MAT, PHY, SOC (400 M€)</td>
<td>EID panel (35M€)</td>
<td>EJD panel (35M€)</td>
</tr>
</tbody>
</table>
A “typical” ITN….
A typical Innovative Training Network

- Collaborative work in **multidisciplinary**, international consortia (academic & non-academic) applies for funding
  - proposing competitively selected **joint research** training/docotral **programme** for Early-Stage Researchers

- When successful, consortium **recruits** researchers across the consortium
  - All projects publish their vacancies on [EURAXESS](https://euraxess.ec.europa.eu)
  - Each researcher has an Individual Research Project
  - Employment contract with full social security (UK visa considerations)

- Duration of projects: **4 years (48 months)**

- Fellowships of 3-36 months (usually **36 months**)

- Maximum **540 researcher-months** per consortium (EID with 2 benef. 180)

- No more than **40% of EU contribution** in one country (except EID with 2 beneficiaries)
A typical Innovative Training Network

- Transferable **skills training** for ESRs
  - Communication
  - Research management
  - Societal outreach
  - Entrepreneurship
  - IPR, Open Science
  - Gender
- Exposure to **non-academic** sector
- **Networking** events
- **Dissemination** activities
  - Social media
  - Final conference,
  - Public engagement
ITN Secondments

• **Highly recommended** to supplement and complement training of ESRs! Can take place in MS/AC and Third Countries (consider practicalities and **costs**)

• Costs for secondments 6 months or less covered by institutional costs (travel and accommodation as a minimum)

• **ETN:**
  – Secondment to other beneficiaries and/or to partner organisations for a duration of up to 30% of his/her recruitment period is encouraged
  – During their secondment, researchers receive supervision and training at the premises of the receiving beneficiary or partner organisation

• **EID** – ESRs must spend at least 50% of their time in non-academic sector, standard 30% of overall project can be spent on secondment.

• **EJD** – No limit on secondment period as time spent at other participating organisations occurs in line with the proposal
How to find partners?

• **Projects and Results** on CORDIS: access to ITN-experienced ITN researchers

• **European Enterprise Network** - brings together almost 600 business in over 50 countries

• Events, info days, conferences...

• **National Contact Points**
Around 130 supported ITN projects every year

http://cordis.europa.eu

http://ec.europa.eu/euraxess
How to find partners?

Partner Search Tool on the ITN Call Page in the Participant Portal

Partner Search

23 organisations are looking for collaborating partners for this topic.

View/Edit Partner Search

LEARs Account Administrators or self-registrars can publish partner requests for specific topics once they have logged into the Participant Portal.

Example of Partner Search Tool:

- **Topic:** Innovative Training Networks
  - **Topic Identifier:** MSCA-ITN-2019
  - **Publication Date:** 17 October 2017
  - **Types of Actions:**
    - MSCA-ITN-ETN European Training Networks
    - MSCA-ITN-FIE European Joint Doctorates
    - MSCA-ITN-EID European Independent Doctorates
  - **Deadline:** 15 January 2019

- Organizations listed include:
  - **Genetic and Bioengineering Program, University of Sarajevo**
    - **Date:** 05 Oct 2018
    - **Type:** Public organization
    - **Expertise:** Expertise offer
  - **Politecnico di Torino**
    - **Date:** 26 Sep 2018
    - **Type:** Public organization
    - **Expertise:** Expertise offer
  - **Higher Education Institution, contact:** sonya.b.costas@gmail.com
  - **Small or medium-size enterprise**
  - **CANADIAN INSTITUTE OF EARTH SYSTEMS**
    - **Date:** 24 Sep 2018
    - **Type:** Higher or secondary education
    - **Expertise:** Expertise request
How to find partners?

Domain specific NCP example search platforms

- **MSCA**: [https://www.net4mobility.eu/eoi.html](https://www.net4mobility.eu/eoi.html)
- **ICT**: [http://www.ideal-ist.eu/partner-search/pssearch](http://www.ideal-ist.eu/partner-search/pssearch)
- **Pharmaceuticals**: [https://cloud.imi.europa.eu/web/eimi-pst](https://cloud.imi.europa.eu/web/eimi-pst)
- **Environment**: [http://www.irc.ee/envncp/?page=search](http://www.irc.ee/envncp/?page=search)
Net4Mobility+ - Expressions of Interest

MSCA Expressions of Interest (EOI)

Are you looking for a partner institution for your MSCA project, or a host institution for your fellowship or fellowship positions, check out the lists below. If you are an institution wishing to publish your MSCA job offers, please contact net4mobility@euresearch.ch.

The EUKRESS Website and Participant Portal also provide some Expressions of Interest in Hosting Candidates. Do not hesitate to promote your EOI also there.

By Country

Argentina
All expressions of interest

Belgium
KU Leuven - IF
KU Leuven - Oncology - IF

Bulgaria
IOMT - IF
Bulgarian Academy of Science - IF

Bolivia
Universidad Privada Boliviana - IF, ITN, RISE

Colombia
Universidad Nacional de Colombia

Croatia
University of Osijek, Department of Cultural Studies - ITN, IF, RISE

Czech Republic
PhD Students

Denmark
University of Copenhagen - TALENT - COFUND

Estonia
University of Tartu

Germany
University of Hamburg - IF
Postdoc positions, updated website by KWR
Technical University of Dresden - IF
TU Berlin - IF

Georgia
Caucasus University - ITN

Greece
IMF-FORTH - IF

By MSC Actions

All Actions
Argentina - All expressions of interest
Colombia - Universidad Nacional de Colombia
Malta - University of Malta - All
Spain - ESHEIton 2020
Turkey - Sabanci University
Bolivia - Universidad Privada Boliviana

Innovative Training Networks (ITN)
Czech Republic - PhD Students
Croatia - University of Osijek
Georgia - Caucasus University
Jordan - University of Jordan

By Panel

All or Several
Argentina - All expressions of interest
Belgium - KU Leuven - IF
Bulgaria - Sofia University - IF
Bolivia - Universidad Privada Boliviana - IF, ITN, RISE
Estonia - University of Tartu
Finland - University of Oulu - IF
Italy - Ca' Foscari University of Venice - IF
Italy - Universita degli Studi di Bologna

Irland - Host Institutions for IF
Greece - IMS-FORTH - IF
Greece - ELIAMEP - IF
Malta - University of Malta - All
Norway - University of Bergen - IF
Poland - University of Warsaw - IF
Poland - Research and Innovation Centre Pro- Akademia - IF
Portugal - Universidade NOVA de Lisboa - IF
Spain - ESHEIton 2020 - IF
Spain - Tecnología - COFUND
Switzerland - EMF, Material Science and Technology - COFUND

Life Sciences
Belgium - KU Leuven - Oncology - IF
Bulgaria - KNIT - IF
Bulgarian Academy of Science - IF
Denmark - University of Copenhagen - TALENT - COFUND
Germany - University of Hamburg - IF
Germany - Postdoc positions, regularly updated website by KWR
Germany - Technical University of Dresden - IF

Italy - TIPPE Project
Irland - APEX - COFUND
Irland - TAEASC - IF

www.net4mobilityplus.eu
Practical and financial matters in ITNs
Innovative Training Networks - Consortium

**Beneficiaries**
- Signatory to the Grant Agreement
- Full partner of the network
- Claim costs directly
- Contribute directly to the implementation of the joint training programme by recruiting (at least 1 ESR for ETNs), supervising, hosting and training ESRs
- Can also provide secondment opportunities
- Participate in Supervisory Board

**Partner organisations**
- Do not sign the Grant Agreement
- Do not recruit ESRs
- Do not claim costs directly (through the beneficiary)
- Provide training and host ESRs during secondments
- Participate in Supervisory Board
- **Need to provide a letter of commitment!**

Mind differences with other MSCA schemes, such as RISE!
ITN Partners – Letter of Commitment

- Should be on headed paper and signed by a legal representative
- Should be scanned and included in Part B (document 2 - section B.7.)
- The evaluators will be instructed to disregard the contribution of any partner organisations for which no such evidence of commitment is submitted

For all ITNs: letters from Partner Organisations only
- Content is important as generic letters are not useful
- Must contain specifics about role and participation of Partner Organisations (tasks allocated) and their commitment to the project

For EJD only: letters from Beneficiaries
- From the academic beneficiaries that will award the doctoral degrees
- Signed by a legal representative – a person authorised to commit the beneficiary to the joint degree programme

No template provided

Template provided (Annex 6)
ITN Consortium Agreements

• Mandatory for all ITNs! Concluded in principle before Grant Agreement signed – deliverable within 2 months of project start

• No official templates, normally prepared by coordinator

• Unofficial templates, based on DESCA 2020 Model Consortium Agreement:
  – LERU template for European Training Networks:
  – BAK template for European Training Networks:

• IPR Helpdesk – IP in MSCA Factsheet.

REA is not party to this agreement and does not verify its content.
### ITN funding

<table>
<thead>
<tr>
<th>Scheme</th>
<th>Researcher unit cost [person/month] Euros</th>
<th>Institutional unit cost [person/month] Euros</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Research, training and networking costs</td>
<td>Management and overheads</td>
</tr>
<tr>
<td>ITN</td>
<td>3270</td>
<td>1200</td>
</tr>
</tbody>
</table>

- Funding based fully on **unit costs**, multiplied by requested ESR person months
- **Automated calculation** of budget when ESR months filled into application
- *A country-specific correction co-efficient will apply to living allowance (UK = 139.83%)
EU contribution

Researcher Unit Costs (ESR allowances)
- Cover employer + employee contributions e.g. NI, statutory pension and tax.
- Good practice to explain the final amount paid to the fellows.
- EID/EJD – consider two options for recruitment and salary implications:
  • ESR employed 100% by a beneficiary and sent to other beneficiaries or partner organisations (one country correction co-efficient)
  • ESR recruited separately by each beneficiary for the period of time they spend there (different country correction co-efficients)

Institutional Unit Costs
- Can be moved between beneficiaries and redistributed to partners (needs to be agreed in the Consortium Agreement); usual practice for the coordinator to retain larger proportion of management costs; discuss the budget early.
- Are managed by beneficiaries according to usual policies.
- No detailed financial reporting but need to evidence ESR recruitment and that ESRs have received their full allowances.
EU contribution

• **The Research, training and networking costs** cover the costs of research and innovation related activities of the project such as:
  – Purchasing of consumables/laboratory costs
  – Conferences/Workshops/Networking Activities
  – Coordination and review meetings
  – **Costs of secondments lasting 6 months or less (minimum travel and accommodation)!**

- **PhD Tuition fees:** ESRs **cannot** be expected to pay fees;
  Eligible cost under institutional costs budget;
  Practice varies (waived/reduced fees; claimed fees)

• **Management and indirect costs** cover all general costs connected with the organisation and implementation of the project (administrative/financial management, logistics, ethics, HR, legal advice, documentation etc.)
MSCA Special Needs Allowance

- Additional MSCA special needs allowance is foreseen in the MSCA Work Programme 2018-20

- Financial support for the additional costs entailed by recruited researchers with disabilities whose “long-term physical, mental, intellectual or sensory impairments are as such that their participation in MSCA would not be possible without extra financial support” (based on UN Convention on the Rights of Persons with Disabilities definition)

- It will be open to all MSCA schemes and limited to a max. of €60,000 per researcher

- It will be available as of Q1 2019

- It will take the form of a Coordination and Support Action

- A request for such an allowance can be made by the beneficiary at any time during project implementation
Innovative Training Networks (ITN)

Application Process
# ITN 2019 Call Information

<table>
<thead>
<tr>
<th><strong>Indicative budget</strong></th>
<th>€470M (€35M EID, €35 EJD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication date</td>
<td>13 September 2018</td>
</tr>
<tr>
<td>Call deadline</td>
<td>15 January 2019 (17:00 Brussels time)</td>
</tr>
<tr>
<td>Evaluation of proposals</td>
<td>March/April 2019</td>
</tr>
<tr>
<td>Evaluation Outcome</td>
<td>June 2019</td>
</tr>
<tr>
<td>Signing of Grant Agreement</td>
<td>September 2019</td>
</tr>
</tbody>
</table>

**1-stage submission**

**Feedback Report (ESR)**
## ITN grant application process

- Applications on-line through the ECAS “Funding and Tenders” Portal
- Apply to specific discipline panel

### Evaluation panels

- Chemistry (CHE)
- Social Sciences and Humanities (SOC)
- Economic Sciences (ECO)
- Information Science and Engineering (ENG)
- Environment and Geosciences (ENV)
- Life Sciences (LIF)
- Mathematics (MAT)
- Physics (PHY)

### Additional multidisciplinary panels for ITNs

- European Industrial Doctorates (EID)
- European Joint Doctorates (EJD)
New Funding and Tenders Portal

All individuals involved will required an ‘EU Log-in’ (formally ECAS)
Find the ITN call in 5 clicks!

1. Click on "SEARCH FUNDING & TENDERS".
2. Filter by programme (only for grants) with "H2020".
3. Filter by programme part with "Marie-Sklodowska-Curie Actions".
4. Filter by status with "OPEN".
5. The ITN call is highlighted. Click on it to view the details.
All the information you need, including the guide for applicants.

Read it and then read it again!
Select your type of action to start submission

**Type of Action:** European Industrial Doctorates (MSCA-ITN-EID)  
**Start SUBMISSION**

**Type of Action:** European Joint Doctorates (MSCA-ITN-EJD)  
**Start SUBMISSION**

**Type of Action:** Training Networks (MSCA-ITN-ETN)  
**Start SUBMISSION**

---

Select your ITN Mode to begin your application

---

Get support:

- [Online manual](#) "Submit a proposal"
- [IT HOW TO](#) "Submission of Proposals"

---

To access the Electronic Submission Service, please click on the submission button next to the type of action that corresponds to your proposal. You will then be asked to confirm your choice of the type of action and topic, as these cannot be changed in the submission.

Upon confirmation, you will be linked to the correct entry point.

To access existing draft proposals for this topic, please log in to the Participant Portal and select the My Proposals page of the My Area section.
Frequently Asked Questions (FAQ)

Those pages are updated with the answers to the most frequent questions that have been submitted to the Horizon 2020 Helpdesk, IT Helpdesk, Call Coordinators and H2020 NCP correspondents.

<table>
<thead>
<tr>
<th>Active(101)</th>
<th>Archived(29)</th>
</tr>
</thead>
</table>

**How can the concept of 'Open Science' be addressed in a MSCA Innovative Training Networks (ITN) proposal / project?**

Open Science describes the on-going evolution in the modus operandi of doing research and organising science. These changes in the dynamics of science and research are enabled by dig... read more...

**In MSCA Innovative Training Networks (ITN), what are the main changes for European Industrial Doctorates (EID) between the 2016-2017 and the 2018-2020 Work Programmes?**

The 2016-2017 Work Programme states the following: "For ITN EID, researchers must spend at least 50% of their time in the non-academic sector. This inter-sectoral mobility has to be... read more...

**In MSCA European Industrial Doctorates (EID) is it possible that only one beneficiary (academic or non-academic sector) recruits all Early Stage Researchers throughout the whole duration of the project?**

Yes, this is possible only in a 2 beneficiary EID. Please note that in a multi-beneficiary EID (3 or more beneficiaries) a maximum of 40.0% of the total EU financial contribution ma... read more...
Proposal Submission

- **Coordinator** registers the draft proposal
  - PIC code.
  - Draft acronym, draft summary, choice of panel.

- **Coordinator** adds beneficiary organisations onto the proposal
  - PIC codes (at least draft PIC).
  - Contacts.

- Proposal is completed
  - Administrative forms (‘Edit forms’).
  - Part B – Two parts (B1 and B2) (‘Download template’ in MS Word and ‘Upload’ as Pdf.).

- Proposal is submitted
  - Submission system checks (‘Validate forms’ and ‘Print preview’).
  - ‘Submit’ as many times as required until the deadline – **submit early and often**!
Download Part B template in Word format.

Edit and update information in Part A.

Upload Part B1 and B2 in .pdf format.
Many fields will be pre-populated using information from both PIC and EU Log-ins. All other fields to be completed and saved in the online form.

Due to technical limitations of the system, the eligibility of the consortium cannot be automatically checked in case the consortium includes partner organisations. Therefore, the applicants might not receive any warnings even if the consortium does not comply with the minimum eligibility criteria. It is the responsibility of the applicants to ensure that all eligibility criteria are fulfilled.
ITN Budget

- Funding based fully on **unit costs**, multiplied by requested person months
- **Automated calculation** of budget when secondment months filled into application
- **Institutional costs** can be **redistributed (at the implementation stage)** between beneficiaries and redistributed to partners (needs to be agreed in the Consortium Agreement) – **discuss the budget early**!
Proposal – Part B (Research proposal)

DOCUMENT 1 (Proposal Number-Acronym-Part B1)
- START PAGE (1 page)
- TABLE OF CONTENTS (1 page)
- LIST OF PARTICIPATING ORGANISATIONS (max 2 pages)

START PAGE COUNT (MAX 30 PAGES SECTIONS 1-3)

1. EXCELLENCE (starting page 5)
2. IMPACT
3. QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

STOP PAGE COUNT (MAX 30 PAGES SECTIONS 1-3)

EID Table indicating for each fellow the time spent in the academic and non-academic sectors

DOCUMENT 2 (Proposal Number-Acronym-Part B2)
- NO OVERALL PAGE LIMIT APPLIED
4. EID SPECIFIC REQUIREMENTS (FOR EID ONLY)
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
6. ETHICS ISSUES
7. LETTERS OF COMMITMENT

+ for EJD: Letters of institutional commitment (for awarding joint, double or multiple doctoral degrees)

No Gantt Chart!!
If the proposal is successful, two mandatory milestones will be added during the Grant Agreement preparation:

- **Mid-Term Check meeting between REA and the consortium, due at month 13-15** (Participation of all beneficiaries and partners expected)

- **Recruitment process completed, due at month 12**

For EID and EJD projects, specific milestones may also be added (PhD enrolment for all recruited researchers, Agreement to deliver the joint/double/multiple PhD).
Tips - Application

• Register in Participant Portal / Submission Service

• Give access to the proposal to relevant people in and outside your organisation (Beneficiaries)

• Stick to formatting rules (page limits, font, etc.)

• Present case clearly: use tables, diagrams, bullet points and summaries where appropriate

• Make sure final version is submitted!
Innovative Training Networks (ITN)

Call statistics from previous years
Submission Rates by Panel

Submitted Proposals in ITN

<table>
<thead>
<tr>
<th>Year</th>
<th>CHE</th>
<th>ECO</th>
<th>ENG</th>
<th>ENV</th>
<th>LIF</th>
<th>MAT</th>
<th>PHY</th>
<th>SOC</th>
</tr>
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<tbody>
<tr>
<td>2014</td>
<td>143</td>
<td>13</td>
<td>325</td>
<td>140</td>
<td>338</td>
<td>21</td>
<td>102</td>
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<td>2015</td>
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<td>17</td>
<td>473</td>
<td>197</td>
<td>432</td>
<td>21</td>
<td>112</td>
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<tr>
<td>2016</td>
<td>178</td>
<td>14</td>
<td>514</td>
<td>178</td>
<td>436</td>
<td>22</td>
<td>124</td>
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<td>2017</td>
<td>204</td>
<td>24</td>
<td>531</td>
<td>211</td>
<td>436</td>
<td>25</td>
<td>121</td>
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<td>2018</td>
<td>195</td>
<td>22</td>
<td>522</td>
<td>196</td>
<td>438</td>
<td>20</td>
<td>108</td>
<td>157</td>
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</table>
## ITN – 2015 Call Results

<table>
<thead>
<tr>
<th>Evaluated proposals</th>
<th>Retain List Threshold</th>
<th>Reserve List Threshold</th>
<th>Success Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIF</td>
<td>95.2</td>
<td>94.6</td>
<td>7.2%</td>
</tr>
<tr>
<td>ENG</td>
<td>94.4</td>
<td>94</td>
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</tr>
<tr>
<td>PHY</td>
<td>95.2</td>
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<tr>
<td>CHE</td>
<td>93.4</td>
<td>93</td>
<td>6.9%</td>
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<td>ENV</td>
<td>92.8</td>
<td>92.6</td>
<td>7.3%</td>
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<td>MAT</td>
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<td>84</td>
<td>6.7%</td>
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<td>12.5%</td>
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<tr>
<td>EID</td>
<td>92</td>
<td>90.6</td>
<td>9.6%</td>
</tr>
<tr>
<td>EJD</td>
<td>92.6</td>
<td>90.8</td>
<td>9.2%</td>
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</table>
### ITN – 2016 Call Results

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<th>Evaluated proposals</th>
<th>Retain List Threshold</th>
<th>Reserve List Threshold</th>
<th>Success Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>LIF</td>
<td>93.8</td>
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<td>7.3%</td>
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<tr>
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## ITN – 2017 Call Results

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<td>89.4</td>
<td>10.6%</td>
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<tr>
<td>EJD</td>
<td>92.8</td>
<td>90.8</td>
<td>12.7%</td>
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</table>
## ITN – 2018 Call Results

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<tr>
<td>EJD</td>
<td>94.2</td>
<td>93.2</td>
<td>11.3%</td>
</tr>
</tbody>
</table>
Note for Resubmissions

• Each evaluation is an independent exercise, and also depends on the level of competition amongst ITN submitted proposals. Over the years proposals are assessed by different evaluators who may express different judgements and opinions;

• If you have submitted your proposal (or a very similar one) to the ITN Calls for Proposals MSCA-ITN-2017 or MSCA-ITN-2018, the evaluators will receive a copy of the previous Evaluation Summary Report. In case the evaluation markedly differs from the previous evaluation(s), the evaluators will be instructed to verify that their comments and scores for the current proposal are duly justified.

• There will be no comparison between proposals.
## ITN Resubmission Data

<table>
<thead>
<tr>
<th>ITN Call</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total number of eligible ITN proposals</td>
<td>1161</td>
<td>1563</td>
<td>1565</td>
</tr>
<tr>
<td>Total number of resubmissions among eligible proposals</td>
<td>316</td>
<td>694</td>
<td>817</td>
</tr>
<tr>
<td>Number of funded projects (Main list)</td>
<td>121</td>
<td>106</td>
<td>109</td>
</tr>
<tr>
<td>Number of resubmissions among funded projects (Main list)</td>
<td>54</td>
<td>60</td>
<td>66</td>
</tr>
<tr>
<td>Resubmissions among funded projects (Main list) - %</td>
<td>44.6%</td>
<td>55.6%</td>
<td>60.6%</td>
</tr>
<tr>
<td>Overall ITN success rate (Main list/eligible proposals)</td>
<td>10.4%</td>
<td>6.8%</td>
<td>7.0%</td>
</tr>
<tr>
<td>ITN resubmissions success rate (Resubmissions in Main List/Resubmissions)</td>
<td>17.1%</td>
<td>8.6%</td>
<td>8.1%</td>
</tr>
<tr>
<td>Total % of resubmissions among submitted proposals</td>
<td>27.2%</td>
<td>44.4%</td>
<td>52.2%</td>
</tr>
</tbody>
</table>

- Resubmission allowed, but no reference to the outcome of previous evaluations in new proposal
- Evaluators' feedback received can be helpful. However, each evaluation is conducted independently from the previous one
- Look to update your proposals not only with regard to feedback received, but try to improve the quality of the project as a whole
Horizon 2020 Statistics

United Kingdom

- 486 Researchers funded
- 535.97 Million €
- 594 Organisations
- 1768 Projects

Read the full country fact sheet
Figures based on 2014-2020

Innovative Training Networks (ITN)

Evaluation Process and Award Criteria
• Almost 26% of ITN evaluators are from non-academic sector
• 43% are women
• ~15% are brand new to Horizon 2020
• Based anywhere in the world (most in EU, many in US, Canada, Australia)
Expert Selection

What does the Research Executive Agency (REA) consider;

- Expertise:
  - Scientific track record,
  - Multidisciplinary profiles
  - PhD programme experience

- Nationality balance

- Gender (at least 40% female)

- Private – Public balance

- At least 25% of newcomers per call (except ethics evaluator/chair/vice-chair)

  Pre-selection of bigger pool, final selection after call closure

Evaluator Guidance Video:

https://ec.europa.eu/info/animated-briefing-independent-experts_en
Evaluation Process

Max. 5 Months to Outcome!
Evaluation Process

Proposal

Individual Evaluation Report

Consensus group

Consensus Report

Eligible proposal

Minimum 3 experts

Individual evaluation

Consensus
Score Descriptors

0 – Proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.

1 – **Poor.** The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 – **Fair.** Proposal broadly addresses the criterion, but there are significant weaknesses.

3 – **Good.** Proposal addresses the criterion well, but a number of shortcomings are present.

4 – **Very Good.** Proposal addresses the criterion very well, but a small number of shortcomings are present.

5 – **Excellent.** Proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

- **Application form reflects evaluation criteria**
- **Each criterion scored between 0 and 5 (including decimal places)**
## ITN evaluation and scoring

<table>
<thead>
<tr>
<th><strong>Marie Skłodowska-Curie Innovative Training Networks</strong></th>
<th><strong>Excellence</strong></th>
<th><strong>Impact</strong></th>
<th><strong>Implementation</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Scored on a scale of 0-5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>50%</td>
<td>30%</td>
<td>20%</td>
<td></td>
</tr>
<tr>
<td>Weighting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1</td>
<td>2</td>
<td>3</td>
<td></td>
</tr>
</tbody>
</table>

**Priority in case of ex aequo**

**Overall threshold of 70% applies to total score**

- Proposals ranked within panels by overall score
- Proposals funded in ranking order – need to aim at a score of 90+!
- **Same scores**: prioritisation decided by panel, based on scores for award criteria (weighting above). **Further prioritisation** based on criteria in line with the WP (e.g. intersectoral mobility, international co-operation, gender).
- Evaluation summary reports provided
- No restrictions on re-application
Avoid common pitfalls

- Unclear research objectives
- High complexity of proposals
- Progress beyond the state of the art poorly explained
- Lack of multi/interdisciplinarity
- Gender aspects ignored
- Non-academic sector neglected
- Proposals not easy to read, not consistent
- Training programme unfocused and not clearly presented
- Transferable skills neglected
- Risk management, IPR, Impact neglected
Understand Evaluation Process

- **Annex 2** to the Guide for Applicants (page 34)
- **Grants Manual: Section on submission and evaluation**
- **MSCA ITN evaluation form** – do self-evaluation

Part B of your proposal

**Evaluation grid**

<table>
<thead>
<tr>
<th>2. IMPACT</th>
</tr>
</thead>
<tbody>
<tr>
<td>The following aspects will be considered when assigning an overall score for this criterion:</td>
</tr>
<tr>
<td>☐ Enhancing the career perspectives and employability of researchers and contribution to their skills development</td>
</tr>
<tr>
<td>☐ Contribution to structuring doctoral / early-stage research training at the European level and to strengthening European innovation capacity, including the potential for:</td>
</tr>
<tr>
<td>a) meaningful contribution of the non-academic sector to the doctoral / research training (as appropriate to the implementation mode and research field)</td>
</tr>
<tr>
<td>b) developing sustainable joint doctoral degree structures (for EJD only)</td>
</tr>
<tr>
<td>☐ Quality of the proposed measures to exploit and disseminate the project results</td>
</tr>
<tr>
<td>☐ Quality of the proposed measures to communicate the project activities to different target audiences</td>
</tr>
</tbody>
</table>

**Strengths of the proposal (in bullet point format):**

- ...
- ...

**Weaknesses of the proposal (in bullet point format):**

- ...
- ...

Score: 2 (out of 5)
ITN Evaluation Criteria

• Excellence

  • Quality, innovative aspects and credibility of the research programme – including inter/multidisciplinary and intersectoral aspects and, where appropriate, gender aspects

  • Quality and innovative aspects of the training programme – including transferable skills, inter/multidisciplinary and intersectoral aspects and, where appropriate, gender aspects

  • Quality of the supervision – including mandatory joint supervision for EID and EJD projects

  • Quality of the proposed interaction between the participating organisations
1.1 Quality, innovative aspects and credibility of the research programme
(including inter/multidisciplinary and intersectoral aspects and, where appropriate, gender aspects)

- **Write in a way that is clear for the evaluators reading it:**
  - Evaluators may not be exact, specific experts in your areas
  - Evaluators may not be familiar with country specific arrangements
  - Evaluators likely to have English as their second language
  - Use diagrams, tables, figures as appropriate to clarify any point

- **Ensure the Research Programme and its objectives, methodology, approach, originality and innovativeness are clear:**
  - Ensure the ‘state-of-the-art’ is emphasised
  - Explain how individual projects will integrate into the overall research programme
  - For EJD/EID explain the research projects in the context of doctoral training
  - Bibliographic references should be included in the footnotes
  - Think about the benefit to Europe of having an ITN in this area
1.1 Quality, innovative aspects and credibility of the research programme
(including inter/multidisciplinary and intersectoral aspects and, where appropriate, gender aspects)

- The project should be split into Work Packages that reflect the research objectives. Table 1.1 should provide brief headings and overviews of the Work Packages (*more detail to be provided in table 3.1*)

<table>
<thead>
<tr>
<th>WP No.</th>
<th>WP Title</th>
<th>Lead Beneficiary No.</th>
<th>Start Month</th>
<th>End month</th>
<th>Activity Type¹²</th>
<th>Lead Participant Short Name</th>
<th>ESR involvement¹³</th>
</tr>
</thead>
</table>
1.2 Quality and innovative aspects of the training programme
(including transferable skills, inter/multidisciplinary and intersectoral aspects)

- Detailed summary of the training objectives stressing the innovative aspects.
- Training opportunities provided should be both unique and tailored to particular areas and also be offered on a network-wide scale:
  - Must demonstrate that advanced skills would be acquired, including complementary/transferable skills and, where appropriate, gender.
  - Emphasise the role of any non-academic organisations in the training and their impact for both beneficiaries and partner organisations.
  - Network-wide events can be opened up to those outside of the network, describe the potential benefits if such activities are planned.
  - Give detail of how local doctoral training at hosts will be integrated into the programme.

- Including secondments is highly recommended to increase impact, preferably at least one per researcher of ~3 months minimum and to an alternate sector to the main host, e.g. from academic to non-academic.
1.3 Quality of the supervision
(including mandatory joint supervision for EID and EJD)

- Specific detail is required on the proposed supervisors and should include:
  - Qualifications of supervisors
  - Numbers of previously supervised fellows
  - Numbers of post-docs mentored

- Include details of any joint supervision, which is mandatory for both EID and EJD
  - How will they complement each other
  - Who will be responsible for what aspects

- The supervisors identified should be appropriately qualified and available to
  monitor and guide ESRs through their training in line with the European Charter

*Note: To avoid duplication, the role and profile of the supervisors should only be listed in the "Participating Organisations" tables in section 5.*
1.4 Quality of the proposed interaction between the participating organisations

• What will be the contributions of each participating organisation and how are they appropriate:
  – Particular expertise
  – Geographical location
  – Existing links or collaborations

• Synergies between partners:
  – To what extent do they complement and enhance each others activities
  – Opportunity for researchers to be involved in a number of linked activities at different partners

• Exposure to different sectors and the opportunity to work outside of ‘comfort zones’:
  – Learn new techniques
  – Develop transferable skills that would be of benefit to industry
Strengths

• The state of the art, the overview of the action as well as the objectives are clearly formulated and well-balanced between scientific and training and mobility.
• The research programme is clearly articulated, coherent and relevant regarding the field.
• The individual research projects are sufficiently analysed and in line with the research objectives.
• Qualifications and supervision experience of the supervisors are well evident.
• All participants have established strong synergies in the field.
• The project partners interact in an obvious and active way and the roles of the non-academic partners are well-integrated.
Weaknesses

- Innovative aspects of the training are not clearly justified.
- The interaction between academic and non-academic partners is not fully explored.
- Gender aspects of the research approach are not convincingly demonstrated. The information provided in the proposal regarding gender issues does not refer to clear provisions translated into concrete measures.
- The allotted time for some of the activities, e.g. the conference, is not sufficiently considered.
- The opportunities to pursue research careers at high profile universities and in well-established private enterprises are not sufficiently elaborated.
ITN Evaluation Criteria

Impact

• Enhancing the **career perspectives** and **employability** of researchers and contribution to their **skills** development

• Contribution to **structuring doctoral / early-stage research training at the European level** and to strengthening **European innovation capacity**, including the potential for:
  a) meaningful contribution of the non-academic sector to the doctoral/research training, as appropriate to the implementation mode and research field
  b) developing sustainable joint doctoral degree structures (for **EJD** projects only)

• Quality of the proposed measures to exploit and **disseminate** the project results

• Quality of the proposed measures to **communicate** the project activities to different target audiences
2.1 Enhancing the career perspectives and employability of researchers and contribution to their skills development

- Explain the impact of the research and training on the Fellows’ careers with specific details of how the impact will be achieved:
  - Research training
  - Transferable skill development
  - Exposure to different sectors, emphasis links with the non-academic sector

- Where possible and appropriate, think about how the research programme fits into higher level EU policies:
2.2 Contribution to **structuring doctoral / early-stage research training at the European level** and to strengthening **European innovation capacity**, including the potential for:

a) **Meaningful contribution of the non-academic sector to the doctoral/research training, as appropriate to the implementation mode and research field**

- What is the role of the non-academic sector in the doctoral/research programme and how does it enhance and separate the programme as leading:
  - Will depend on the field being worked in
  - What can the programme offer with the inclusion of the non-academic sector that other programmes that don’t, can’t

- Make sure the innovative aspects that the involvement of non-academic partners bring is emphasised and, again, highlight any relevant EU policies:
b) Developing sustainable joint doctoral degree structures (for EJD projects only)

- How might the programme contribute to developing sustainable collaborative degree structures delivering joint degrees

- Demonstrate further, cross-border integration of EU institutions through the programme
2.3 Quality of the proposed measures to exploit and disseminate the project results

- Dissemination of the research results
  - Horizon 2020 obligations to make publications and research data open access
  - How will the results be disseminated, which repositories, etc.?
  - How will data be managed?

- Exploitation of results and intellectual property
  - If you decide to exploit and/or commercialise your results, how will you do this?
  - What form of protection, e.g. patents, will you adopt?

<table>
<thead>
<tr>
<th>Explain how Dissemination feeds into Exploitation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sharing research results with potential users - peers in the research field, industry, other commercial players and policymakers</td>
</tr>
</tbody>
</table>
Further Resources

Online Manual – Dissemination and Exploitation

European IPR Helpdesk

Fact Sheet

*The Plan for the Exploitation and Dissemination of Results in Horizon 2020*

**July 2015**

Introduction .................................................................................................................. 1
1. The Plan for the Exploitation and Dissemination of Results in Horizon 2020 .......... 3
   1.1 Characteristics and purpose ........................................................................... 3
2. Content of the Plan for the Exploitation and Dissemination of Results ................. 4
2.1 Draft plan for the Exploitation and Dissemination of the project results .......... 4
   2.1.1. Exploitation and dissemination measures .............................................. 5
   2.1.2. Strategy for knowledge management, protection, exploitation and dissemination of results ......................................................... 6
   2.1.3. The PEDR under different Horizon 2020 funding schemes .................... 8
2.2 The PEDR and the periodic and the final technical reports ................................ 9

Useful Resources ....................................................................................................... 10

[Link to the document](www.iprhelpdesk.eu/sites/default/files/newsdocuments/FS-Plan-for-the-exploitation-and-dissemination-of-results_1.pdf)
2.4 Quality of the proposed measures to communicate the activities to different target audiences

- What are the project’s plans for communication of research findings?
- What is the communication and public engagement strategy of the project?
- Who are the appropriate audiences for these activities?
- What are the appropriate means for these activities?

Online Manual – Communicating your Project

Public Engagement

Researchers should ensure that their research activities are made known to society at large in such a way that they can be understood by non-specialists, thereby improving the public's understanding of science. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns.

Communicating EU research and innovation guidance for project participants
Obligation to provide open access when publishing

Source: European Commission
5 - Call-specific questions

Extended Open Research Data Pilot in Horizon 2020

If selected, applicants will by default participate in the Pilot on Open Research Data in Horizon 2020\(^7\), which aims to improve and maximise access to and re-use of research data generated by actions. However, participation in the Pilot is flexible in the sense that it does not mean that all research data needs to be open. After the action has started, participants will formulate a Data Management Plan (DMP), which should address the relevant aspects of making data FAIR findable, accessible, interoperable and re-usable, including what data the project will generate, whether and how it will be made accessible for verification and re-use, and how it will be curated and preserved. Through this DMP projects can define certain datasets to remain closed according to the principle "as open as possible, as closed as necessary". A Data Management Plan does not have to be submitted at the proposal stage. Furthermore, applicants also have the possibility to opt out of this Pilot completely at any stage (before or after the grant signature). In this case, applicants must indicate a reason for this choice (see options below). Please note that participation in this Pilot does not constitute part of the evaluation process. Proposals will not be penalised for opting out.

We wish to opt out of the Pilot on Open Research Data in Horizon 2020.

- [ ] Yes
- [x] No

Further guidance on open access and research data management is available on the participant portal:


The following applies for all calls with an opening date on or after 26/07/2016:

- Grant beneficiaries under this work programme part will engage in research data sharing by default, as stipulated under Article 29.3 of the Horizon 2020 Model Grant Agreement (including the creation of a Data Management Plan). Participants may however opt out of these arrangements, both before and after the signature of the grant agreement. More information can be found under General Annex L of the work programme.

Foresee a Research Data Management Plan as deliverable of the project in month 6


Source: European Commission
Useful resources

www.openaire.eu
FOSTER – EU-funded project on Open Science

https://www.fosteropenscience.eu/
**Strengths**

- The potential for meaningful contribution of the non-academic sector is high and credible.
- The dissemination strategy is concrete and appropriate and offers a practical plan on how to share data resources and results of the project with different target groups like partners, specialists and a general audience.
- The communication and public engagement strategy are clearly described, using different platforms and taking advantage of special events like the European Researcher’s Night, which ensure a broad audience.
- The IP strategy is sound. Some exploitable results have been identified.
- The communication plans include a good number of actions towards the industrial sector.
- Relevant outcomes for the economy and society are adequately outlined.
- Long-lasting collaboration between sectors after the end of the project are foreseen to strengthen the innovation capacity.
Weaknesses

• The impact of the research and training programme on the fellows’ careers beyond the narrow research field is not guaranteed.

• The relevance of complementary skills to enhance career perspectives of the fellows is insufficiently discussed.

• The measures for dissemination of results have been described; however the dissemination plans are not quantified and no innovative activities are included. The focus on disseminating results within the small membrane scientific community is not clearly justified.

• The outreach activities towards general public have been described, but their relevance is not clearly discussed.
ITN Evaluation Criteria

Implementation

• **Coherence and effectiveness of the work plan,** including appropriateness of the allocation of tasks and resources (incl. awarding of the doctoral degrees for EID and EJD projects)

• **Appropriateness of the management structures and procedures,** including quality management and risk management (with a mandatory joint governing structure for EID and EJD projects)

• **Appropriateness of the infrastructure of the participating organisations**

• **Competences, experience and complementarity of participating organisations and their commitment to the programme**
3.1 Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources (incl. awarding of the doctoral degrees for EID and EJD)

- The Work Plan must be clear and include the following using tables provided:
  - **Work Package** descriptions – *table 3.1a* – Work Packages should be included for all activities:
    - Research
    - Management
    - Training
    - Dissemination and communication
  - List of major **deliverables** – *table 3.1b* (including awarding of doctoral degrees where applicable)
  - List major **milestones** – *table 3.1c*
  - Fellows **individual projects** – *table 3.1d*

- **Reminder** – *This no longer includes a Gantt Chart.*
3.2 Appropriateness of the management structures and procedures, including quality management and risk management (with a mandatory joint governing structure for EID and EJD)

- Include comment on the following points and explains who in the consortium will be responsible for what and when will they do it:
  - Network organisation and management structure/supervisory board
  - Joint governing structure (mandatory for EID and EJD projects)
  - For EJD, joint admission, selection, supervision, monitoring and assessment procedures
  - Recruitment strategy
  - Progress monitoring and evaluation of individual projects
  - Risk management at consortium level (including table 3.2a)
  - Intellectual Property Rights (IPR)
  - Gender aspects (both at the level of recruitment and decision making within the project)
  - Data Management Plan

- Include table 3.2a on Implementation Risks

<table>
<thead>
<tr>
<th>Risk No.</th>
<th>Description of Risk</th>
<th>WP Number</th>
<th>Proposed mitigation measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>R1</td>
<td>e.g. Delay in recruitment</td>
<td>WP 1</td>
<td></td>
</tr>
</tbody>
</table>
3.3 Appropriateness of the infrastructure of the participating organisations

• Given the tasks allocated to each participating organisation, provide details to explain and demonstrate their appropriateness. Will help be provided by other institutional departments such as HR or Finance?

• Factual information will be provided in section 5 ‘Participating Organisations’ so more of a narrative can be provided here

• What do the organisations have to offer:
  – Laboratories/Office Space
  – Technical expertise
  – Workshops
  – Other facilities

• Again, refer to the European Charter for Researchers and any endorsement of it by participating organisations

• Other evidence to show competence of organisations in recruiting and hosting, such as the ‘HR Strategy for Research (HRS4R)’ award - can demonstrate this [http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs](http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs)
3.4 Competences, experience and complementarity of participating organisations and their commitment to the programme

- Demonstrate complementarity across the network in terms of compatibility and coherence between tasks

- Explain the level of commitment of the organisations involved and their readiness to deliver a success ITN project if selected (*partner organisations see sections 5 and 7 as well*)

- In particular, emphasise the commitment of non-academic sector organisations

- If ‘Third Countries’ not automatically eligible for funding are requesting support, the reasons for this should be detailed here

- Partner Organisations need to provide a letter of commitment in Section 7, so make sure this is in line with what is said here to reinforce the case
**Strengths**

- The listed work packages are well defined with clear deliverables and milestones.
- The individual ESR projects are well structured with well argued and realistic objectives, expected results, secondments. The secondments are coherent with the objectives.
- The basic principles of the management of the project are clearly formulated: shared responsibility, joint ownership of data and good communication. The management structure is clear and well structured with a Supervisory Board that guarantee an adequate balance between scientific and technological training. The management plan offers a realistic problem-solving mechanism in the event of disputes between partners with the creation of an External Advisory Committee.
- The progress monitoring mechanisms and evaluation of individual projects are clearly presented.
Evaluation Summary Report Quotes - Implementation

**Weaknesses**

- The procedure for awarding doctoral degrees is not clearly presented.
- The complementarity of the partners is not sufficiently demonstrated.
- Key research facilities, infrastructure and equipment of both beneficiaries are insufficiently detailed with regard to the hosting of ESRs by the non-academic beneficiary.
- The timing in the work plan is not convincing, e.g. the first workshop is scheduled when almost half of the ESRs have not yet joined the network, and the final conference is scheduled after more than half of the ESRs have finished.
- The management structure is not fully clear. It contains few bodies and relies to a large extent on individuals instead of boards/committees. The structure supporting these individuals is not clearly explained.
- The scientific milestones and their means of verification are not sufficiently defined.
Other Key Considerations

• **Operational capacity of the organisations**
  – Use well tables in Section 5 of Part B
  – Profile of key staff, description of key infrastructure or technical equipment, all partner organisations contributing towards the proposed work
  – Different information for Beneficiary and Partner

• **Ethics Issues**
  – Self-assessment in Part A and strategy in Section 6 of Part B
  – Outside the 10-page limit – provide detailed strategy
  – Crucial for all research domains → need to identify any potential ethical issues and describe they will be addressed
  – All proposals considered for funding subject to Ethics Review
  – Read the Ethics Self-Assessment Guidelines


• **Letters of Commitment**
  – From Partner Organisations - On headed paper and signed with individual with appropriate authority – **no** specific template available
  – EJD – Mandatory letters from beneficiaries detailing commitment to award appropriate degrees signed by someone with appropriate authority – **template now available** (Annex 6)
Principles of research integrity will apply throughout all MSCA. They also endorse Open Science and the Horizon 2020 Responsible Research and Innovation (RRI) cross-cutting issue, engaging society, integrating the gender and ethical dimensions, ensuring the access to research outcomes and encouraging formal and informal science education.

All applicants to the MSCA calls are encouraged to adopt an RRI approach into their proposals.

European Code od Conduct for Research Integrity

Report from the Expert Group on Policy Indicators for Responsible Research and Innovation

Rome Declaration on RRI in Europe

Open Science

Gender Aspects

- Don’t underestimate this section (gender experts in all Evaluation Panels) – *explicit evaluation criteria!*

- Relate to EU policies on Gender Equality – cross-cutting priority in Horizon 2020

- Equal opportunities (among researchers and decision-makers/supervisors)

- Gender dimension in the **research content** (e.g. subjects or end-users) and **project management**

- Gender dimension in **training activities** – where appropriate
Gender Aspects - links

- **Gendered Innovation**, Stanford University project: https://genderedinnovations.stanford.edu/
  - practical tools for researchers: methods to be used in a research project; case studies; checklist


- **H2020 Gender Advisory Group** paper on preparing grants that integrate the gender dimension into research. http://ec.europa.eu/transparency/regexpert/index.cfm?do=groupDetail.groupDetailDoc&id=18892&no=1
MSCA video on Gender Dimension

Understanding gender dimension for MSCA projects

Horizon 2020 IPR Helpdesk

• For further information see: www.iprhelpdesk.eu

  – Horizon 2020 IPR Helpdesk (advice, events, articles, webinars)


IPR Helpdesk – IP in MSCA Factsheet:

UN Sustainable Goals in MSCA Work Programme 2018 - 20

Closing Thoughts…

• Set aside enough time
• Clarify your own goals for applying
• Read all Call documentation (i.e. Guide for Applicants and Work Programme) and consider any relevant EU policy documents
• Fully appreciate the evaluation criteria - think IMPACT!
• Help evaluators (success is in the detail!)
  – Address well the main objectives
  – Use clear and concise language
  – Explain country specific jargon
  – Provide them with the evidence they need
• Discuss with and meet your partners
• Research previous and current projects, particularly those in your area
• Find colleagues to proof read the drafts with the evaluation criteria in hand
• Create a ‘perfect’ project, ready for implementation
Abstract – Have a story to tell…

• Make the relevance very clear
• Clearly but shortly explain what you are going to do
• Highlight impact

  ~ EU impact? Knowledge gap? Why your project? Why now?

Overall presentation matters…

• Use tables, colours, graphs and schematic representations of concepts & information you want them to see and understand (this takes time...)
• Check consistency across the whole proposal
• Avoid repetition, highlight key information
Key Messages from Today

ITN is not only a research project – **training-through-research**!

Put yourself in the shoes of the evaluators – make their life easy...

The Guide for Applicants – *don’t let it out of your sight!*
Links

• EU MSCA website  http://ec.europa.eu/research/mariecurieactions/index_en.htm
• The Charter and the Code -  http://ec.europa.eu/euraxess/index.cfm/rights/index
• Euraxess Mobility Portal - http://ec.europa.eu/euraxess
• IPR Help Desk - www.iprhelpdesk.eu
• HR Excellence in Research’ award - http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs
• Innovation Union - http://ec.europa.eu/research/innovation-union/index_en.cfm
• Ethics in Horizon 2020  http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/ethics_en.htm
• Marie Curie Guidance for Outreach (For FP7, but still useful) http://ec.europa.eu/research/mariecurieactions/documents/documentation/publications/guidelines_en.pdf