Horizon 2020
Marie Skłodowska-Curie
Actions (MSCA)

Innovative Training Networks (ITN)

About us

• UKRO is the office of the seven UK Research Councils in Brussels and delivers a subscription-based advisory service for around 150 research organisations in the UK and beyond.

• UKRO also provides National Contact Point services on behalf of the UK Government.

• Our mission is to maximise UK engagement in EU-funded research, innovation and higher education.
Our daily work

• **UKRO services:** offering a wide range of quality services to help subscribers and sponsors make informed decisions on participating in EU programmes

• **Policy work:** supporting UK input into European research policy development and implementation.

• **Brussels liaison:** establishing and maintaining contacts with the European Institutions and other major Brussels stakeholders in research and innovation.

Our suite of services

• **UKRO Portal:** always up to date with the latest in EU funding and policy

• **Enquiry service and you dedicated European Advisor:** individual support and advice, all year round

• **Annual visit:** a tailored event for your institution

• **Meeting room:** a venue in Brussels – free of charge

• **Specialist training courses, focus groups and information events:** providing in-depth insight into EU programmes

• **Annual conference for European officers:** the latest information on programmes and policies presented by European Commission staff, and other speakers

• **UK National Contact Points for the Marie Curie Actions and the European Research Council (ERC)**
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

• Funded by

Marie Skłodowska-Curie Actions (MSCA)

Policy background, schemes overview and basic participation rules
**Horizon 2020 overview**

- The EU’s funding programme for research and innovation
- Runs for seven years from 2014 – 2020
- Almost €80 billion of funding
- Structured around three pillars including a wide range of different funding schemes

**Who is eligible?**

All 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?

• Overseas Countries and Territories (OCT) linked to the Member States
  – Just naming a few: Anguilla, Aruba, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Curacao, 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

• Associated Countries:
  – Norway, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland (partial association Pillar 1, including MSCA), Faroe Islands, as well as Tunisia and Ukraine (pending approval)

• Third countries (whether they can receive funding depends on GDP/list in Work Programme)

• BRIC no longer eligible for funding (Brazil, Russia, India, China)

Third countries – eligibility and funding

• Only less developed economies (countries mentioned in Annex A to the WP) are automatically eligible for EU funding

• Developed and developing economies, such as the USA, Canada, Australia, New Zealand, BRIC, Mexico, etc. will no longer automatically qualify for EU funding

• Funding may be provided in the following cases
  – Under the existence of a bilateral agreement specifying such funding i.e. EU-US agreement for Societal Challenge 1 (Health)
  – When such funding is specifically mentioned in the call text or topic
  – When Commission deems participation of an entity essential for the success of the project due to its expertise, access to data, etc.
But everyone can participate!

Horizon 2020 structure

Excellent Science
- European Research Council (ERC)
- Future and Emerging Technologies (FET)
- Marie Skłodowska-Curie Actions (MSCA)
- Research Infrastructures

Industrial Leadership
- Leadership in Enabling and Industrial Technologies (LEIT) - ICT, NMBP, Space
- Access to Risk Finance
- Innovation in SMEs

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

European Institute of Innovation and Technology (EIT)
EURATOM
Joint Research Centre (JRC)
Excellent Science: Rationale

- 30% of total Horizon 2020 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

Marie Skłodowska-Curie Actions

".. Ensure excellent and innovative research training as well as attractive career and knowledge-exchange opportunities through cross-border and cross-sector mobility of researchers to best prepare them to face current and future societal challenges."

Total budget: €6.2bn
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

The ‘triple-i’ research & training experience within the ‘knowledge triangle’...
Marie Skłodowska-Curie Actions

For institutions

- Run and take part in collaborative cross-border, cross-sector research, researcher training and/or staff exchange programmes on a research topic and field of their choice
- Employ talented, well-funded researchers in any research field

For individuals

- Well-remunerated 1-3 year research fellowships in the best research facilities in their field in Europe and overseas
- PhD studies in the context of a pan-European research training network
- Exposure to work in the non-academic sector

Marie Skłodowska-Curie Actions

Innovative Training Networks (ITN)

- For Early Stage Researchers

Individual Fellowships (IF)

- For Experienced Researchers

Research and Support Staff Exchange (RISE)

- Exchange visits (secondments) of staff

Co-funding of programmes (COFUND)

- For regional, national, international doctoral or fellowship programmes
Marie Skłodowska-Curie Actions

Researchers’ Night

- Coordination and support action
- Europe-wide public and media event dedicated to the promotion of science and research careers
- Call published every two years

MSCA calls – 2016 timetable (preliminary)

<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-2016</td>
<td>15 October 2015</td>
<td>12 January 2016</td>
<td>370</td>
</tr>
<tr>
<td>MSCA-RISE-2016</td>
<td>8 December 2015</td>
<td>28 April 2016</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-IF-2016</td>
<td>12 April 2016</td>
<td>14 September 2016</td>
<td>218.50</td>
</tr>
<tr>
<td>MSCA-COFUND-2016</td>
<td>14 April</td>
<td>29 September 2016</td>
<td>80</td>
</tr>
<tr>
<td>MSCA Researchers’ Night</td>
<td>15 October 2015</td>
<td>13 January 2016</td>
<td>8</td>
</tr>
</tbody>
</table>
### Key MSCA Definitions

**Early Stage Researcher (ESR)**  
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.

**Experienced Researcher (ER)**  
At the time of the call deadline (IF) or secondment (RISE) by the host organisation, must be in possession of a doctoral degree or have at least 4 years of full-time equivalent research experience.

**Academic sector**  
Includes universities and higher education institutions (public and private) awarding degrees, non-profit research institutions (public and private), and international European interest organisations.

**Non-academic sector**  
Includes any socio-economic actor not included in the academic sector.

### Standard Mobility Rule

“*At the time of the relevant deadline for submission of proposals, or recruitment/secondment by the host organisation, depending on the action, researchers shall not have resided or carried out their main activity (work, studies, etc.) in the country of their host organisation for more than 12 months in the 3 years immediately prior to the reference date.*”

No restrictions on nationality!
Innovative Training Networks (ITN)

Overview

What are Innovative Training Networks?

• “Aim to train a new generation of creative, entrepreneurial and innovative researchers, able to face current and future challenges and to convert knowledge and ideas into products and services for economic and social benefit”

• Key policy aspects
  – Triple “i” dimension – international, interdisciplinary, intersectoral
  – Knowledge triangle – research, education, innovation
  – Employability and Entrepreneurship
  – Exchange of Best Practice amongst participating organisations

Initial Innovative Training Networks

2007-2013 2014-2020

Non-academic sector participation

Contributing to EU Europe 2020 Policy
A typical Innovative Training Network

- Collaborative work in **multidisciplinary**, international consortia (academic + non-academic)
- Proposing competitively selected **joint research** training/doctoral **programme** for Early-Stage Researchers
- Recruit researchers across the consortium – each researcher has an **Individual Research Project**
- Advanced research and transferable **skills training**
  - e.g. communication, research management, societal outreach, entrepreneurship, IPR, elements of Open Science
- Exposure to non-academic sector (**secondments**)  
- Networking events

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**ITN activities**

- Summer schools
- Seminars, workshops
- Visiting researchers
- Research and Innovation
- **Secondments placements**
- Dissemination Communication

**ESR career development**
Around 130 supported ITN projects every year

More MSCA case studies

Wave energy plant secures H2020 funds
Aquamarine Power and the National University of Ireland, Maynooth (NUIM) have together secured an €800,000 Horizon 2020 grant to improve the performance of the SME’s Oyster wave energy converter. The venture entitled ‘Modelling the technical and economic performance of real wave energy devices’ (or INNOWAVE), is set to begin in May 2016 and will draw funding from the Marie Skłodowska-Curie Innovative Trai...

http://ec.europa.eu/euraxess

http://cordis.europa.eu

How to find partners?

• **CORDIS Partner search** - [https://cordis.europa.eu/partners/web/guest/home](https://cordis.europa.eu/partners/web/guest/home) Self-registered profiles of researchers and innovators, searchable by area of expertise, country, call for proposals


• **European Enterprise Network** - [http://een.ec.europa.eu/](http://een.ec.europa.eu/) - brings together almost 600 business in over 50 countries

• Events, info days, conferences

• **National Contact Points**

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How to find partners?

• **Health**: [http://www.fitforhealth.eu/](http://www.fitforhealth.eu/)
• **ICT**: [http://www.ideal-ist.eu/partner-search/pssearch](http://www.ideal-ist.eu/partner-search/pssearch)
• **Nanotechnologies**: [https://www.nmp-partnersearch.eu/index.php](https://www.nmp-partnersearch.eu/index.php)
• **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)
• **Transport**: [http://www.transport-ncps.net/services/partner-search.html](http://www.transport-ncps.net/services/partner-search.html)
• **Space**: [http://www.fp7-space.eu/fp7-space-info-16.phtm](http://www.fp7-space.eu/fp7-space-info-16.phtm)
• **Security**: [http://www.seren-project.eu/index.php/partner-search-support](http://www.seren-project.eu/index.php/partner-search-support)

**NCP networks**
### European Training Networks

- At least 3 beneficiaries from different MS/AC
- Doctoral programme enrolment optional
- Maximum 540 researcher-months

**ETN: €317M**

### European Joint Doctorates

- At least 3 beneficiaries from different MS/AC
- Doctoral programme enrolment mandatory
- Joint governance, admission, selection, supervision, monitoring and assessment mandatory
- Award of joint, double or multiple doctoral degree mandatory
- Maximum 540 researcher-months

**EJD: €28M**

### European Industrial Doctorates

- At least 1 academic and 1 non-academic partner (primarily enterprises)
- Doctoral programme enrolment mandatory
- Joint governance, admission, selection, supervision, monitoring and assessment mandatory
- Maximum 180 researcher-months for 2 partner consortia

**EID: €25M**

### Common features:
- Only Early Stage Researchers (ESR) recruited
- Maximum project length = 48 months
- Maximum ESR contract length = 36 months
- Collaboration between academic and non-academic sectors essential
- Participation of third countries possible

### Innovative Training Networks

#### Beneficiaries (Participants level 1)

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

#### Partner organisations (Participants level 2)

- Do not sign the Grant Agreement
- Provide training and host ESRs during secondments
- Participate in Supervisory Board
ITN – European Training Networks (ETN)

- Average size: 6-10 beneficiaries
- 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) to other beneficiaries or partner organisations
- Maximum 40% of total budget to any one country
- Enrolment on doctoral programme not mandatory
- Joint supervision encouraged

ETN – minimum set-up

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

Source: European Commission
ITN – European Industrial Doctorates (EID)

- Obligatory non-academic beneficiary, “preferably enterprise”
- ESRs must be enrolled on a doctoral programme at academic beneficiary
- Research must be in the area of the doctoral programme and should aim to support long-term, industry-oriented research (fundamental or applied)
- ESRs must spend at least 50% of their time in the non-academic sector
- Mandatory joint selection, training and supervision of ESRs by both sectors
- ESR contract length: 36 months expected as standard, but the contract can be split between beneficiaries (check mobility rules and salary implications)

EID – minimum set-up

Max. 180 researcher months (5 ESRs on 36 month contracts)
EID – 3+ beneficiaries

EID – Multi-beneficiaries

- 3+ beneficiaries
  - Min. 1 academic
  - Min. 1 non-academic
  - in 2 countries (MS/AC)
  - Additional beneficiaries any sector, any country

- Max. 540 researcher-months
- PhD enrollment
- > 50% of time at non-academic sector
- Joint supervision

ITN – European Joint Doctorates (EJD)

- Promotes structural change to European doctoral training landscape
  - Closer cooperation between academic organisations
  - International, intersectoral and interdisciplinary collaboration – participation of non-academic sector is essential!
- Creation of coherent joint doctoral programmes that deliver joint, double or multiple degrees
- Joint selection, supervision, monitoring and assessment of ESRs through a joint governance structure
- ESRs must be enrolled on a doctoral programme
- ESR contract length: 36 months expected as standard, but the contract can be split between beneficiaries (check mobility rules and salary implications)
- ESR likely to split their stay between beneficiaries to fulfil joint doctoral programme requirements + additional secondment(s) to partner organisations of up to 30% of their contract period
- Maximum 40% of total budget to any one country
EJD - degree options

Joint degree

- 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

Double / multiple degrees

- 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

EJD – minimum set-up

Network composition:

- At least 3 beneficiaries from different MS/AC entitled to award doctoral degrees.
  Additional beneficiaries or partner organisations from any country, sector and discipline

- Participation of non-academic sector essential

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

Source: European Commission
### ITNs – overview of 3 modes

<table>
<thead>
<tr>
<th></th>
<th>ETN</th>
<th>EID</th>
<th>EJD</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Beneficiaries (Level 1)</strong></td>
<td>3 minimum</td>
<td>2 minimum</td>
<td>3 minimum</td>
</tr>
<tr>
<td></td>
<td>3 different MS/AC</td>
<td>2 different MS/AC</td>
<td>3 different MS/AC</td>
</tr>
<tr>
<td><strong>Partners (Level 2)</strong></td>
<td>Unlimited (any country/sector)</td>
<td>Unlimited (any country/sector)</td>
<td>Unlimited (any country/sector)</td>
</tr>
<tr>
<td><strong>Non-academic sector involvement</strong></td>
<td>Beneficiary and/or partner level</td>
<td>Beneficiary and partner</td>
<td>Partner and/or beneficiary</td>
</tr>
<tr>
<td><strong>ESR contracts</strong></td>
<td>3-36 months</td>
<td>3-36 months</td>
<td>3-36 months</td>
</tr>
<tr>
<td><strong>PhD enrolment</strong></td>
<td>Typically expected</td>
<td>Mandatory</td>
<td>Mandatory</td>
</tr>
<tr>
<td><strong>Other intersectoral aspects</strong></td>
<td>Secondments encouraged (≤30%)</td>
<td>50% ≥ in non-academic sector</td>
<td>Secondments encouraged (≤30%)</td>
</tr>
<tr>
<td><strong>Researcher months per project</strong></td>
<td>540 max</td>
<td>180 max</td>
<td>540 max</td>
</tr>
<tr>
<td></td>
<td>(With ≥ 3 beneficiaries = 540 max)</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Budget/country</strong></td>
<td>40%</td>
<td>N/A</td>
<td>40%</td>
</tr>
<tr>
<td><strong>Evaluation</strong></td>
<td>Evaluated in scientific panels covering eight broad areas of research: CHE, ECO, ENG, ENV, LIF, MATH, PHY, SOC</td>
<td>1 ranking list by multidisciplinary EID panel</td>
<td>1 ranking list by multidisciplinary EJD panel</td>
</tr>
<tr>
<td><strong>Panels and ranking lists</strong></td>
<td>8 ranking lists by panel (CHE, ECO, ENG, ENV, LIF, MATH, PHY, SOC)</td>
<td>1 ranking list by multidisciplinary EID panel</td>
<td>1 ranking list by multidisciplinary EJD panel</td>
</tr>
</tbody>
</table>

### 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>Living allowance*</td>
<td>Mobility allowance</td>
</tr>
<tr>
<td>ITN</td>
<td>3110</td>
<td>600</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 = 120.3%)
- ESR allowances cover employer + employee contributions e.g. NI, statutory pension, tax
- ESR allowances are a minimum to be paid, top-ups from other sources allowed
- Institutional costs can be moved between beneficiaries and redistributed to partners (needs to be agreed in the Consortium Agreement)
- No detailed financial reporting but need to evidence ESR recruitment and that ESRs have received their full allowances
Innovative Training Networks (ITN)

Application Process

<table>
<thead>
<tr>
<th>ITN 2016 Call Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Indicative budget</strong></td>
</tr>
<tr>
<td>Publication date</td>
</tr>
<tr>
<td>Call deadline</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Evaluation of proposals</td>
</tr>
<tr>
<td>Evaluation Outcome</td>
</tr>
<tr>
<td>Signing of Grant Agreement</td>
</tr>
</tbody>
</table>

1-stage submission

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

- Applications on-line through the ECAS Participant 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)

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### Participant Portal

![Participant Portal Image]

**Research and Innovation Funding**

On this site you can find and access families for research & innovation projects under the following EU programmes:

- **2004-2006** (Framework 5) - research and innovation framework programme
- **2007-2013** (Framework 6) - research & innovation framework programme (RFT) and Competitiveness & Innovation Programme (CIP)

- **Non-repetitional users**
  - search for funding
  - read the funding guide & download the legal documents
  - check if an organisation is already registered
  - contact our support service or visit our FAQs

- **Registered users**
  - submit your proposal
  - sign the grant
  - manage your project throughout its lifetime
Calls for Proposals

Horizon 2020

Horizon 2020

In addition to the search facilities, the full list of H2020 Calls can be found here.
Call documents

Key information

- **Work Programme**
  - Introduction
  - 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


Proposal submission

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

- **Coordinator** adds beneficiary organisations onto the proposal
  - Contacts

- Proposal is completed
  - Administrative forms (‘Edit forms’)
  - Part B (‘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**!

Proposal – Part A (on-line Administrative forms)

Table of contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>General information</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(abstract, acronym, evaluation panel, etc.)</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Participants &amp; contacts</td>
<td><strong>Beneficiaries only</strong></td>
</tr>
<tr>
<td>3</td>
<td>Budget</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(number of researcher months per beneficiary)</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Ethics</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Cat-specific questions</td>
<td>Information on partner organisations</td>
</tr>
</tbody>
</table>

*How to fill in the forms*

The administrative forms must be filled in for each proposal using the templates available in the submission system. Some data fields in the administrative forms are pre-filled based on the previous steps in the submission wizard.
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!**

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**ITN Consortium Agreements**

- Obligatory for all ITNs (**new**)
- No official templates, normally prepared by coordinator
  - BAK template for European Training Networks: [www.uni-giessen.de/bak/BAKAG_Recht_CA_Marie_CurieITN_based_on_DESCA_01062015.docx/view](http://www.uni-giessen.de/bak/BAKAG_Recht_CA_Marie_CurieITN_based_on_DESCA_01062015.docx/view)

**REA is not party to this agreement and does not verify its content.**
### Proposal – Part B (Research proposal)

### START PAGE

<table>
<thead>
<tr>
<th>LIST OF PARTICIPANTS</th>
</tr>
</thead>
</table>

### START PAGE COUNT

- 30 pages

### STOP PAGE COUNT

1. **EXCELLENCE**
2. **IMPACT**
3. **IMPLEMENTATION**

### 4. GANTT CHART
5. **CAPACITIES OF THE PARTICIPATING ORGANISATIONS**
6. **ETHICAL ISSUES**
7. **LETTERS OF COMMITMENT**
   - +for EJD: Letters of institutional commitment (indicating their commitment to award joint, double or multiple doctoral degrees)

Please note that:

- Applicants must ensure that sections 1-3 do not exceed the limit of 30 pages. The expert evaluators will be strictly instructed to disregard any content above this limit.
- No reference to the outcome of previous evaluations of this or any similar proposal should be included in the text. The expert evaluators will be strictly instructed to disregard any such references.

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### Tips - Application

- Register in Participant Portal / Submission Service
- Give access to the proposal to relevant people in and outside your organisation (Beneficiaries)
- Put yourself in the shoes of the evaluator
- Write clearly and concisely (plain English!)
- Stick to formatting rules (page limits, font, etc.)
- Present case clearly: use tables, diagrams, bullet points and summaries where appropriate
- Ask someone to read through your proposal
- Make sure final version is submitted!
Innovative Training Networks (ITN)

Call results from previous years

<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>93.2</td>
<td>92</td>
<td>9.2%</td>
</tr>
<tr>
<td>ENG</td>
<td>92.6</td>
<td>92</td>
<td>9.6%</td>
</tr>
<tr>
<td>PHY</td>
<td>93.8</td>
<td>92.4</td>
<td>8.8%</td>
</tr>
<tr>
<td>CHE</td>
<td>91.6</td>
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<td>10.3%</td>
</tr>
<tr>
<td>ENV</td>
<td>91</td>
<td>90.6</td>
<td>9.5%</td>
</tr>
<tr>
<td>SOC</td>
<td>94.8</td>
<td>93.2</td>
<td>9.2%</td>
</tr>
<tr>
<td>MAT</td>
<td>90</td>
<td>87.4</td>
<td>6.3%</td>
</tr>
<tr>
<td>ECO</td>
<td>95</td>
<td>84.2</td>
<td>9.1%</td>
</tr>
<tr>
<td>EID</td>
<td>87</td>
<td>86</td>
<td>18.8%</td>
</tr>
<tr>
<td>EJD</td>
<td>85.2</td>
<td>83.8</td>
<td>15.4%</td>
</tr>
<tr>
<td>Average</td>
<td></td>
<td></td>
<td><strong>10.62%</strong></td>
</tr>
</tbody>
</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>
<td>7.8%</td>
</tr>
<tr>
<td>PHY</td>
<td>95.2</td>
<td>93.6</td>
<td>6.6%</td>
</tr>
<tr>
<td>CHE</td>
<td>93.4</td>
<td>93</td>
<td>6.9%</td>
</tr>
<tr>
<td>ENV</td>
<td>92.8</td>
<td>92.6</td>
<td>7.3%</td>
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<tr>
<td>SOC</td>
<td>95.2</td>
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<tr>
<td>MAT</td>
<td>88.4</td>
<td>84</td>
<td>6.7%</td>
</tr>
<tr>
<td>ECO</td>
<td>92.4</td>
<td>91.8</td>
<td>12.5%</td>
</tr>
<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>
</tr>
<tr>
<td><strong>Average</strong></td>
<td></td>
<td></td>
<td><strong>8.12%</strong></td>
</tr>
</tbody>
</table>
Evaluation Process

1. Proposal Submission
   - Via Participant Portal
   - Admissibility/eligibility checks

2. Remote Evaluations
   - At least 3 evaluators
   - Individual reports produced

3. Consensus Meetings
   - Consensus reports produced
   - Agreement on comments/score

4. Ranked list of proposals
   - Lists by panel
   - Projects funded in priority order until budget is exhausted

Max. 5 Months to Outcome!

ITN evaluation and scoring

<table>
<thead>
<tr>
<th>Marie Skłodowska-Curie Innovative Training Networks</th>
<th>Excellence</th>
<th>Impact</th>
<th>Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scored on a scale of 0-5</td>
<td>50%</td>
<td>30%</td>
<td>20%</td>
</tr>
<tr>
<td>Weighting</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Priority in case of ex aequo</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall threshold of 70% applies to total score</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Proposals ranked within panels by overall score
- Proposals funded in ranking order – need to aim at a score of 90+!
- Evaluation summary reports provided
- No restrictions on re-application
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
- Decimal points can be awarded

---

**ITN Evaluation Criteria**

- **Excellence**
  - Quality, innovative aspects and credibility of the research programme – including inter/multidisciplinary and intersectoral aspects
  - Quality and innovative aspects of the training programme – including transferable skills, inter/multidisciplinary and intersectoral 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)

- 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 researcher projects will integrate
  - 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)

- 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 Type</th>
<th>Lead Participant Short Name</th>
<th>ESR involvement</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
1.2 Quality and innovative aspects of the training programme (including transferable skills, inter/multidisciplinary and intersectoral aspects)

- Provide a 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 (explicitly mentioned in Guide 2016)
  - 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
  - Give detail of how local doctoral training at hosts will be integrated into the programme
- Include secondments, 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 projects)

- 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 for Researchers - http://ec.europa.eu/euraxess/index.cfm/rights/europeanCharter

*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 network has strong intersectoral capacity with clear links to policy making
• The project is truly interdisciplinary by bringing together diversified and appropriate disciplines
• There are good quality synergies between the participating parties, including secondment of ESRs to another university and working in tandem with other ESRs including partner organization synergies
• Special attention is dedicated to the training and promotion of women and to family needs
• The supervision is of high quality as it relies on the extensive experience of the staff scientists
• Network-wide training courses and industrial workshops are well planned
Weaknesses

- The quality of the training programme is insufficiently detailed. The large number of training events, their range of themes and duration are not sufficiently justified.
- The content and objectives of the training programme are not sufficiently described. In particular the innovative aspects of the training programme are not adequately presented.
- The section on research methodology does not sufficiently elaborate on the specific methods to be used in the proposed research.
- Supervision scheme is not fully developed, given the demanding nature of the ITN ESR research programs.
- The state-of-the-art, the coherence and the innovative aspects of the planned research and training activities are not convincingly presented.

ITN Evaluation Criteria

- Impact
  - Enhancing research- and innovation-related human resources, skills and working conditions to realise the potential of individuals and provide new career perspectives.
  - Contribution to structuring doctoral/early-stage research training at the European level and to strengthening European innovation capacity, incl. 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 only)
  - Effectiveness of proposed measures for communication and dissemination of results.
2.1 Enhancing research- and innovation-related human resources, skills and working conditions to realise the potential of individuals and provide new career perspectives

• 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 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:

2.2 b) Developing sustainable joint doctoral degree structures (for EJD only)

• How might the programme contribute to developing sustainable collaborative degree structures delivering joint degrees
2.3 Effectiveness of proposed measures for communication and dissemination of results

- What are the project’s plans for communication, dissemination of research results and the exploitation of results and intellectual property
  - Who are the appropriate audiences for these activities
  - What are the appropriate means for these activities
  - Note impact plans for exploitation of IP

- In the European Charter for Researchers, the following are covered in more detail:
  - Public Engagement – make the general public aware of the research activities in a manner that is widely understood
  - Dissemination and exploitation of results – all results should be appropriately disseminated bearing in mind contractual obligations concerning Open Access. Where results are being exploited, appropriate action to protect them, e.g. patents, should be adopted

Evaluation Summary Report Quotes - Impact

Strengths

- The proposal convincingly explains the impacts of the research and training programme on academic and non-academic skills and on the working conditions of the ESRs
- Through its multi-sectoral nature and its emphasis on technological innovation the proposed network has the potential to strengthen European innovation capacity
- The proposal provides a detailed list of the journals and conferences where the research findings will be disseminated, with specific lists for each WP and plans for commercialization
- The proposed network has the potential to create long-lasting structures at a European level for a programme that brings together different communities from different areas
Evaluation Summary Report Quotes - Impact

Weaknesses

- Contribution of the programme to strengthening European innovation capacity is weakly explained
- The communication and public engagement strategy of the project, in particular regarding the addressing the general public, is not explained in adequate detail
- The proposal does not clearly document the consortium’s capability to enhance skills and working conditions for involving the researchers in the relevant field and the manner in which new career prospects will be accommodated. Only general terms are listed
- The contribution of the non-academic sector is not described in sufficient detail and it is not clear how it will be integrated in the work plan

ITN Evaluation Criteria

- Implementation
  - 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 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 projects)

- 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
  - 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

- Include a Gantt chart using the example provided to show progress of the project in months elapsed

NB: Gantt chart outside of page limit

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 projects)

- 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
  - Joint governing structure (mandatory for EID and EJD projects)
  - For EJD, joint admission, selection, supervision, monitoring and assessment procedures
  - Supervisory board
  - 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 that of decision making within the project)

- Include table 3.2a on Implementation Risks
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
  - Technical expertise
  - Workshops
  - Office space
  - 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 Excellence in Research’ award - [http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs](http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs) - can demonstrate this

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 allocation of tasks and resources is clear and well-balanced among the participants.
- The infrastructure of the participating organisations is very well outlined.
- The consortium of all participating institutions provides high-level expertise and also complementarity, which is appropriately distributed over the discipline areas. Many of the participating scientists are leaders in this field.
- Efficient management structure is proposed with clear division of responsibilities between different boards and committees. All mandatory governing structures for management and supervision are in place. Reasonable plans are included for the decision making and conflicts resolution. The described recruitment, monitoring and evaluation procedures are appropriate for the proposed project.

**Weaknesses**

- Considering the overall work load of the ESRs (including training, presentations, policy briefings, PhD) that targeted output of 3 peer reviewed papers is too ambitious.
- There is limited description of the academic background expected from each of the ESRs given the content of their respective projects.
- Almost none of the beneficiaries make statements about their commitment in terms of FTE to the programme.
- There are too many tasks and responsibilities for the supervisory board. It is not clear how all this will be managed.
- The major technical risks associated with the scale up of the production of nanowires are not appropriately addressed.
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

Slightly different information for Beneficiary and Partner, but 1 page each.

• 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


Responsible Research and Innovation

“Marie Skłodowska-Curie actions endorse 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.”

Rome Declaration on Responsible Research and Innovation in Europe, November 2014

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

Open Science: https://ec.europa.eu/digital-agenda/en/open-science

Gender Aspects

- Don't underestimate this section (gender experts in all Evaluation Panels) – *now 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)
- Gender dimension in **training activities** – where appropriate

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**Gender Aspects - links**

- [Gendered Innovation](https://genderedinnovations.stanford.edu/), Stanford University project:
  - practical tools for researchers: methods to be used in a research project; case studies; checklist
- [Horizon 2020 Manual](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/gender_en.htm), part on Gender equality:
- [H2020 Gender Advisory Group](http://ec.europa.eu/transparency/regexpert/index.cfm?do=groupDetail.groupDetailDoc&id=18892&no=1) paper on preparing grants that integrate the gender dimension into research.
Horizon 2020 IPR

- For further information see: [www.iprhelpdesk.eu](http://www.iprhelpdesk.eu)
  - Horizon 2020 IPR Helpdesk (advice, events, articles, webinars)

  IPR Helpdesk – IP in MSCA Factsheet:

Final tips

- Clarify your own goals for participation
- Read all Call documentation (i.e., Guide for Applicants and Work Programme)
  - Also consider relevant EU policy documents
- Research previous and current projects
- Discuss with and meet potential partners
- Use appropriate partnership (including balance of budget and activities)
- Fully appreciate the evaluation criteria (Non-academic participation is key)
- Make the evaluators’ job easy! make sure you cover each point; do not bury in text
- Set aside enough time
- Work with your institution!
Links

- EU Marie Curie Actions web page (currently FP7 only) - [http://ec.europa.eu/research/mariecurieactions/index_en.htm](http://ec.europa.eu/research/mariecurieactions/index_en.htm)
- Euraxess Mobility Portal - [http://ec.europa.eu/euraxess](http://ec.europa.eu/euraxess)
- IPR Help Desk - [www.iprhelpdesk.eu](http://www.iprhelpdesk.eu)

Thank you!

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