

Marie Skłodowska-Curie Actions (MSCA) and Citizens

Information For Applicants

mariecurie-uk@ukro.ac.uk

27 June 2023

Housekeeping



All participants will be muted for the duration of the webinar.



A chat function is available and will be monitored.



The session is recorded



Please use the Q&A function to submit questions. Up voting is available



Agenda

1 Welcome

Introduction to UKRO and UK Relationship to EU

2 MSCA Overview

Short introduction to MSCA

3 MSCA and Citizens

Call overview, eligibility, the submission and evaluation process

4 Case Study

Personal experience

5 Question and Answer





About UKRO

We support UK research organisations involved in EU R&I

- Maximise UK participation in Horizon Europe
- Provide a service to around 140 subscribers
- A Brussels-based team of advisors
- Part of UKRI's wider International team
- UK National Contact Point for <u>European</u>
 <u>Research Council</u>, <u>Marie Sklodowska-Curie</u>

 <u>Actions programmes</u>, <u>Widening Participation</u> and <u>COST</u>



Unlock the power of the UKRO portal

Sign up for MSCA newsletter delivered to your inbox

Register for an event on the <u>UKRO events page</u>

Find out more about MSCA funding opportunities

Contact the UK MSCA National Contact Point

https://www.ukro.ac.uk/mariecurie/





UK's Relationship w EU

Participation on Horizon Europe



Horizon Europe participation

On 24 December 2020, the negotiations on the UK-EU Trade and Cooperation Agreement concluded

The <u>announcement</u> confirmed the UKs' intention to associate **to Horizon Europe**

This includes **full participation in the programme** (with the exception of the EIC Fund)

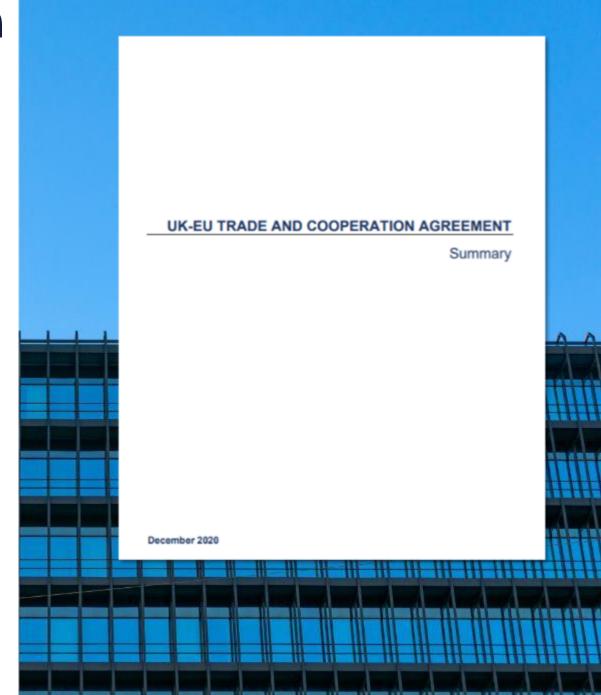
UK entities can participate in/coordinate projects and receive funding from Horizon Europe, incl. MSCA

European Commission's Q&A confirms UK eligibility

UKRO website provides latest information on UK participation

MSCA statement on UK eligibility





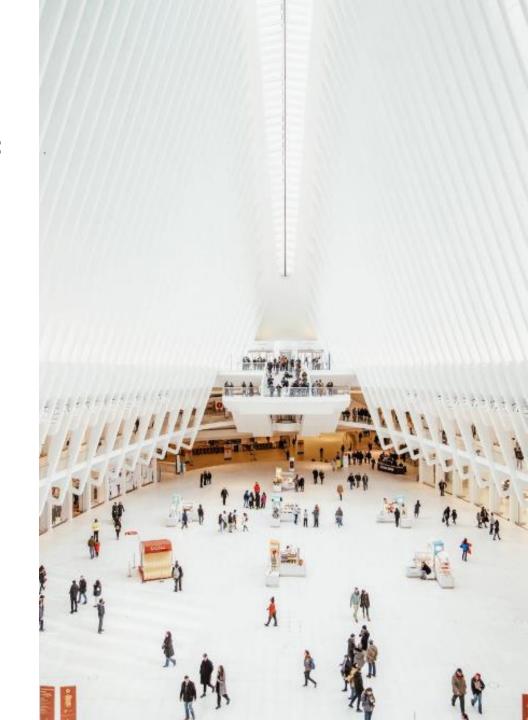
Commission Q&A

European Commission's Q&A confirms UK eligibility to apply:

"UK entities including universities, research centres, scientists, innovative businesses, industry, etc. can participate in the first calls for proposals of Horizon Europe as soon as they are published on the European Commission's website."

"...UK applicants are treated as if the UK is an associated country throughout the process, from admissibility and eligibility to evaluation, up until the preparation of grant agreements."





Delay to UK Association

Until UK associates, during Grant Agreement Preparation Phase the UK is considered a Third Country.

Third Country participants cannot sign the grant agreement.

In November 2021 UK government provide announced a guarantee to support successful applicants to Horizon Europe.

The <u>UK government has announced</u> an further extension to the guarantee.

The guarantee covers **all eligible**, current applications to call with a **deadline on or before 30 September 2023**.

Guaranteed funding for successful Horizon Europe UK applicants



Marie Skłodowska-Cur Actions (MSCA)

Quick Overview



What Does Horizon Europe Look Like?



Excellence Science: Reinforcing and extending the excellence of the Unions science base



MSCA Key Features

Operates on a 'bottom-up' basis – any subject area

From basic research through to near market take-up

Dissemination and public engagement - public outreach

Interdisciplinary, intersectoral and international mobility

Enhance skills of people behind research and innovation

Gender Friendly and Inclusive

Enhance skills of people behind research and innovation

Encouraging people to become researchers and innovators

Equip researchers with the necessary skills and international experience

Foster innovation and develop entrepreneurial mindset

Promote the EU's global attractiveness for talents

Contribution to the EU external policy objectives



MSC Actions

Doctoral Networks

 Supports doctoral programmes, developed by universities, research institutions and research infrastructures, businesses including SMEs,and other socio-economic actors from different countries across Europe and beyond.

Postdoctoral Fellowships

 Enhances the creative and innovative potential of researchers holding a PhD.

Staff Exchanges

 Promote innovative international, inter-sectoral and interdisciplinary collaboration in research and innovation.

COFUND

 Co-finances new or existing doctoral programmes and postdoctoral fellowship schemes.

MSCA and Citizens

 Aims to bring research and researchers closer to the public at large, to increase awareness of research and innovation activities and to boost public recognition of science and research education.





HORIZON-MSCA-2023-CITIZENS-01-01 Call deadline: 17:00 CET 25 October 2023



MSCA & Citizens

Public engagement activities

Aims to bring research and researchers closer to the wider public

Boost public recognition of science and research educations

Show the role of research and research for society and the economy

Increase the interest of young people in research and research careers

Focus on families, pupils, students

Inclusive approach

Promotes gender balance, open science

Encourages and promotes responsible research and innovations





Aims Of the Call

For researchers

- Enhanced opportunities to interact with citizens and local, regional and national authorities
- Improved communication skills and competences to interact with a non-research audience, notably with pupils and students.

For organisations

- Increased reputation and visibility in hosting excellence research projects towards the general public and possible future students
- Researchers' work made more tangible, concrete, accessible, and thus opening research and science to all
- Improved outreach to all audiences, and notably those who do not have an easy access to science and research activities
- Better communication of R&I results and activities to society, increased and strengthened opportunities for citizens' engagement



Two main activities

European Researchers Night

- Takes place every year
- Last Friday of September (can last for 2 days)
- Include pre-events, related post-events, wrap-up meetings, or small-scale follow up events

Researchers at School Initiative

- Strengthens connections between research and educations
- Brings researchers to schools and other pedagogical and educational centres
- Encourages the interaction of students at all levels of primary and secondary education
- Students learn directly about research projects and activities
- Takes place through out the year



Eligible Activities

- Creativity is key
- Promote how researchers contribute to our societies and tackle their future challenges
 - Focus on EU policy priorities such as European Green Deal and EU Missions
- Demonstrate strong interaction between researchers and the public
- Broad and diverse
 - Consider activity, location and researchers/audience involved
- Involvement of MSCA funded researchers and staff!

- Actively combine entertainment and education (edutainment!)
 - hands-on experiments, science shows, debates, competitions, workshops, webinars, invited speakers, live demonstrations, science slams, guided visits of labs, exhibitions or research institute etc
 - Direct interactions with students and teachers
- Encourage regional, national and international partnership and collaboration

Activities are structured around 5 work packages



The Call Timeline

European Researchers' Night and Researchers at Schools 2024-2025 (HORIZON-MSCA-2023-CITIZENS-01-01)

Action	Date
Invitation to Submit Proposal	20 June 2023
Deadline for Submission	25 October 2023 17:00 Brussels Time
Information on Outcome of Evaluations	February 2024
Indicative Date for Signing the Grant Agreement	March-April 2024

Make sure things are ready in good time and submitted well ahead of the deadline!



Eligibility

Getting started



Call Details

Consortium composition

- Follows standard Coordination and Support Action (CSA) eligibility conditions
- At least 1 legal entity established in an EU member state of associated country
- May include other legal entities

2023 Call Budget

• 15.42 EUR Millions (expect ~50 projects to be funded)

Duration

- 24 Months
- Applicants are encouraged to submit proposals covering activities for both 2024 and 2025
 - Includes two successive editions of the European Researchers' Night (2024 and 2025) and implementation of Researchers at Schools activities throughout project duration.



Funding

Will follow the lump sum funding model

- Expected contribution per project between €50,000 and €150,000 per annual edition.
- Total expected EC contribution for the 2 editions (2024 and 2025)
 is between €100,000 and €300,000
- Applicants can request different amounts
- Proposals must contain a detailed budget (separate excel spreadsheet) that covers:
 - Personal costs, subcontracting, travel subsistence, equipment, other goods works and services (purchase costs), other cost categories
 - Indirect cost of 25% flat rate added to specific direct cost categories (see the <u>Horizon Europe Model Grant Agreement</u>)





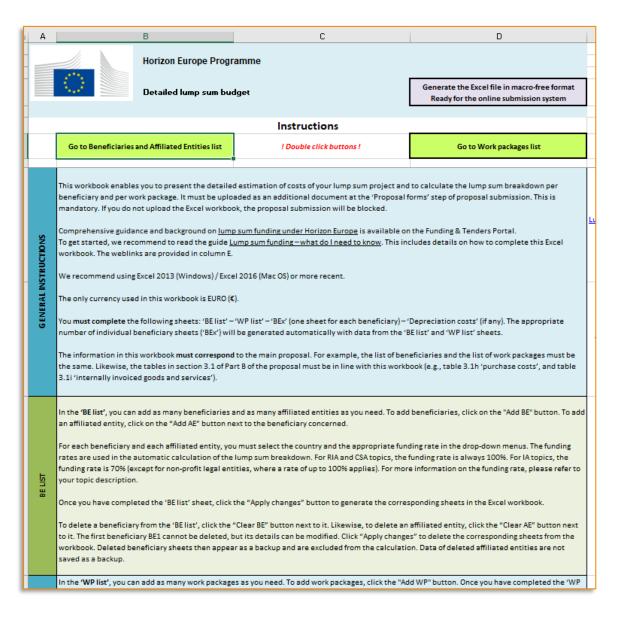
Lump Sums

- Must provide a split of the lump sum per beneficiary per work package
- Payment is linked to the completion of work packages (partial payments possible)
- Overarching work packages, such as 'Management', can be split into smaller ones to align with reporting periods/payments
- When splitting work packages, such as 'Management', one does not need to describe them in detail more than once
- Experts will assess the costs estimations entered in the detailed budget table, under the 'implementation criteria'
- One dedicated <u>lump sum page</u> on the Funding &Tenders Portal

The budget table must be uploaded during the proposal stage.

Proposals may be deemed ineligible if the table is missing.





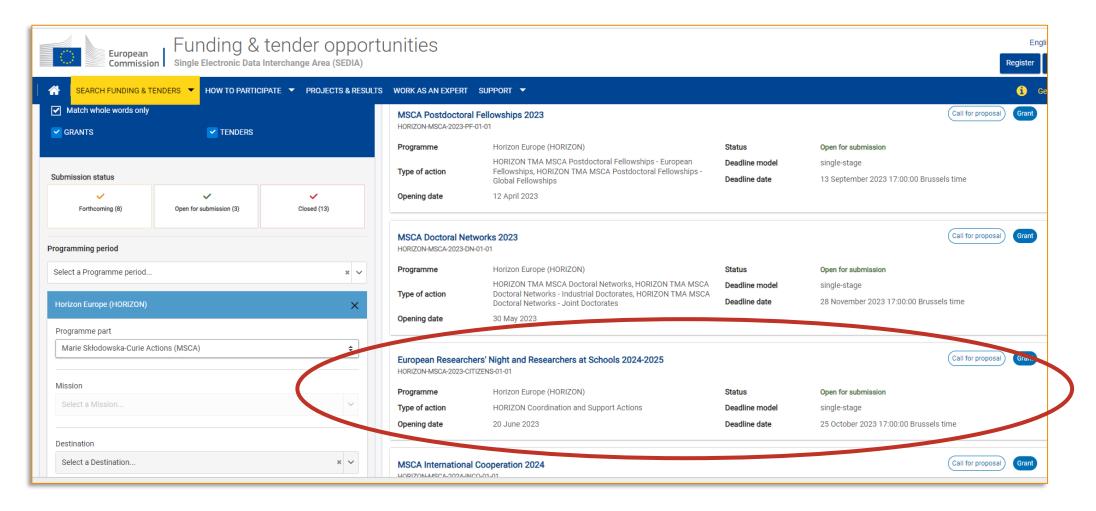
https://circabc.europa.eu/share/fs/7thm54

Submission Process

Part A – Administrative Forms



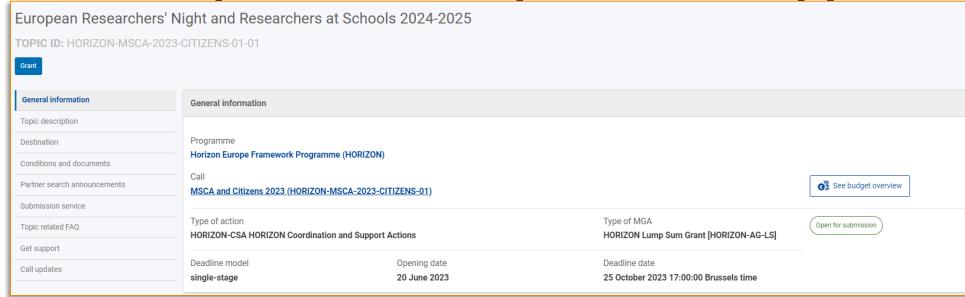
Call Page on Funding & Tender Opportunities

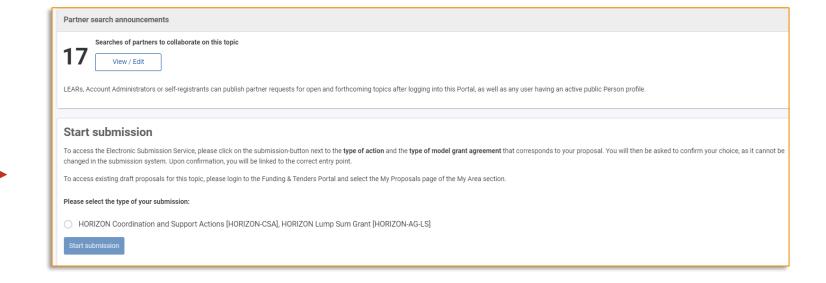




https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities

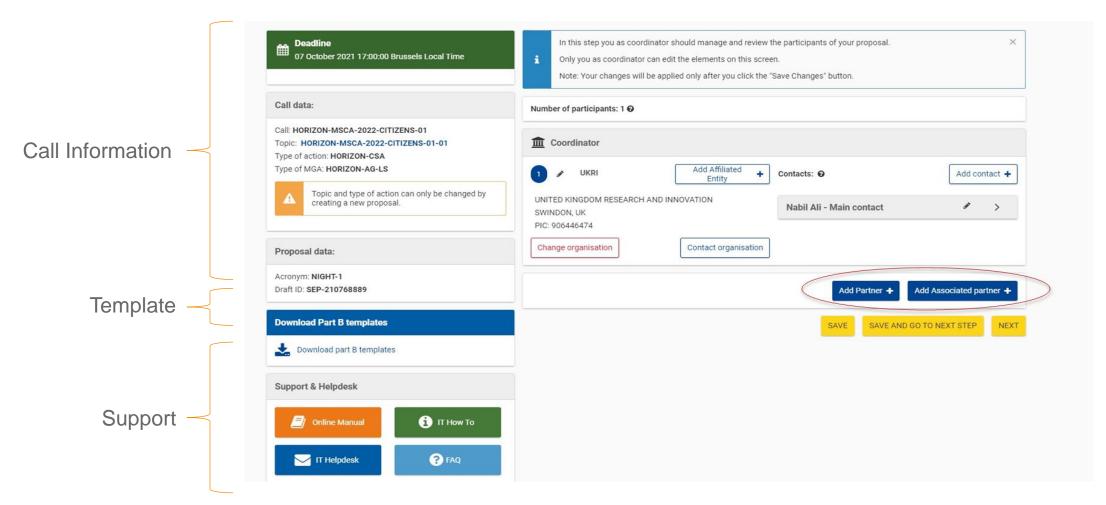
Call Page on Funding & Tender Opportunities







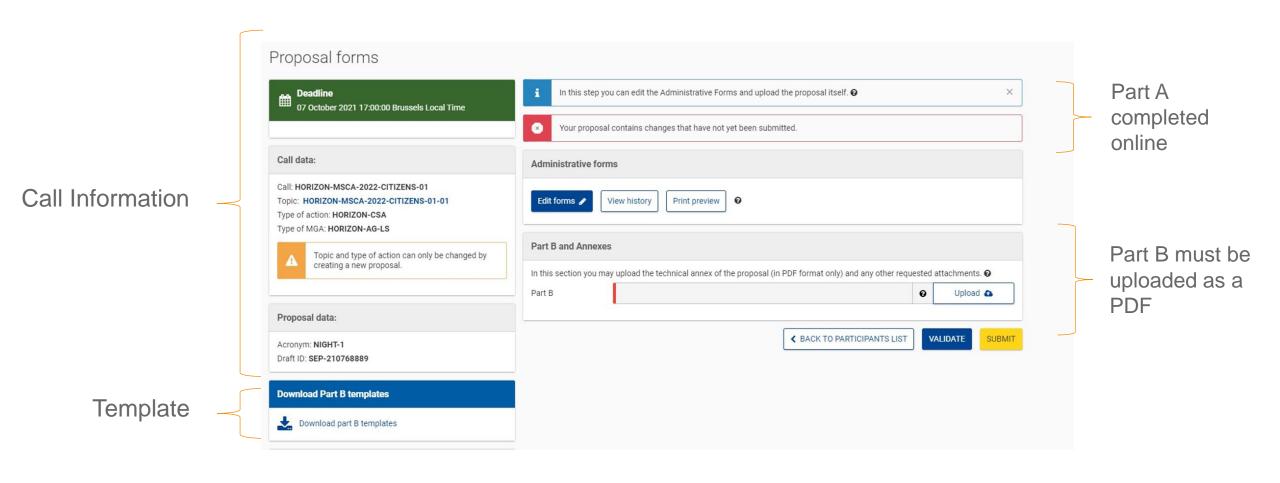
Adding Participants





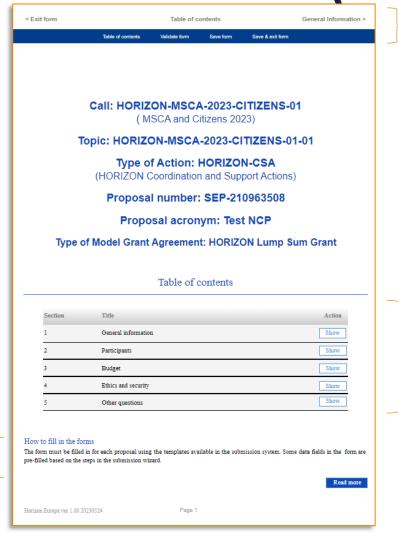
❖ Add partner = add beneficiary

Submission system





Proposal Forms – Part A (Administrative Forms)



Sections to be completed

Navigation Tool

Guidance



- 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.

Budget Table



Proposal ID SEP-210963509

Acronym NCP test

3 - Budget

No	Name of Beneficiary	Country	Role	Requested grant amount
1	Ukri	UK	Coordinator	200 000.00
2	Qmul	UK	Partner	150 000.00
3	Uoxf	UK	Associated	
	Total			350 000.00

☐ Enter the requested EC contribution from the excel budget table.

Beneficiary



The excel budget table must also be submitted at the proposal stage

Ethics & Security questions - Section 4

UK applicants should answer 'yes' on questions about non-European activity

Follow Horizon Europe guidance document: 'How to complete your ethics self-assessment'

This will not affect eligibility.

Answering 'yes' on certain questions may require a brief text response from the applicant.

Applicants may be requested to upload documents related to particular questions.

Page references to relevant sections of proposal for each issue if you answer 'Yes' (part B1 and B2)





Part B

- Complete ALL mandatory tables
- Use required sub-headings
 - Can also include additional subheading
- Deliverables should be divided into
 - Scientific deliverables and management, training, recruitment and dissemination deliverables
- Milestones
 - Control points in the action that help to chart progress and MAY be linked to deliverables

part B1 (document 1):

- Comprises the Start Page, Table of Contents, List of Participating Organisations and and declarations tables
- Sections 1-3
- The maximum total length for this document is 33 pages
- The Expert evaluators will disregard any excess pages above the 33 page limit
- Respect the instructions



Formatting

Min font size 11*

All margins at least 15mm**

Reference font is Times New Roman (Windows platform), Times/Times New Roman (Apple platforms) or Nimbus Roman No. 9 L (Linux distributions)

The page formatting will be systematically checked by the REA

Information provided through hyperlinks will be disregarded

Tables should not be used to circumvent min font size

Headers and page numbers as specified

Save files using specified format and naming convention

Do not delete any of the tags, as they are needed for processing.

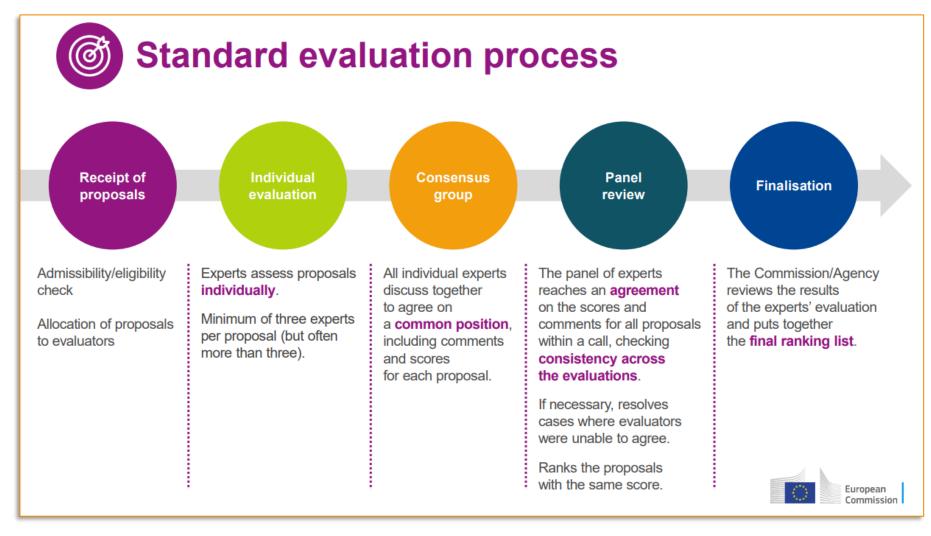


Evaluation Process

How does it work



Evaluation Workflow





Evaluation Criteria

Excellence (50%)	Impact (30%)	Quality and efficiency of the implementation (20%)	
Clarity and pertinence of the project's objectives.	Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme, and the likely scale and significance of the contributions due to the project.	Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages, and the resources overall	
Quality of the proposed coordination and/or support measures, including soundness of methodology.	Suitability and quality of the measures to maximize expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication	Capacity and role of each participant, and extent to which the consortium as a whole brings together the necessary expertise.	

activities.



https://ec.europa.eu/info/fundingtenders/opportunities/docs/2021-2027/horizon/temp-form/ef/ef_he-csa_en.pdf



Proposal Development

Points to Consider



Section 1 Excellence

Clarity and pertinence of the objectives

- Describe the specific objectives pursued.
- Keep in mind main objective from the Commission.

Quality of the proposed coordination and or support measures including soundness of methodology

- Topics/disciplines involved
- Describe the stakeholders and their engagement
- Describe the novelties and the evolution compared to previous similar initiatives (if relevant)
- Main ideas on which the proposal relies
- Lessons learnt from any previous similar experience (whether EU funded or not)



Section 2 Impact

Credibility of the pathways to achieve the expected outcomes and impacts specified in the work programme and the likely scale and significance of the contributions from the project.

- Increased awareness among the general public for the importance of R&I
- Please explain how the approach and activities chosen will contribute to reach the five objectives:
- A favourable general attitude to public funding
- Better understanding of the key benefits of research in society
- Reduction in stereotypes about researchers and their profession
- Increase, in the long term, of people taking up research careers
- Better understanding of the EU among the general public

Suitability and quality of the measures to maximise the expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities

- Level of awareness/number of expected attendees
- Involvement of H2020/MSCA researchers
- Synergies with other initiatives
- Improvement for researchers public recognition
- How will increase popularity of research careers



Expected Impact – impact pathway

Steps towards the achievement of the expected impacts of the project over time

Scientific impact

- Creating high-quality new knowledge
- •Strengthen human capital in R&I
- •Fostering diffusion of knowledge and Open Science

Societal impact

- Addressing EU policy priorities and global challenges
- Delivering benefits and impacts via R&I missions
- Strengthening the uptake of R&I in society

Economic impact

- Generating innovation-based growth
- Creating more and better jobs
- Leveraging investments in R&I

- Links to dissemination, exploitation and communication
- Maps the contribution to the expected outcomes in the destination and wider work programme
 - Depending on the project may address only 1 or more of the three expected impacts



Addressing Impact

Described in the proposal under Section 2 Impact

Summary of the key elements of your project impact pathway and measures to maximise its impact.

Strong links to the dissemination, exploitation and communication activities

Must include impact summary using the tables in the proposal template



https://ec.europa.eu/info/fundingtenders/opportunities/docs/2021-2027/horizon/wp-call/2021-2022/wp-1general-introduction_horizon-2021-2022_en.pdf

https://eeas.europa.eu/ sites/default/files/horiz on_europe_strategic plan_2021-2024.pdf



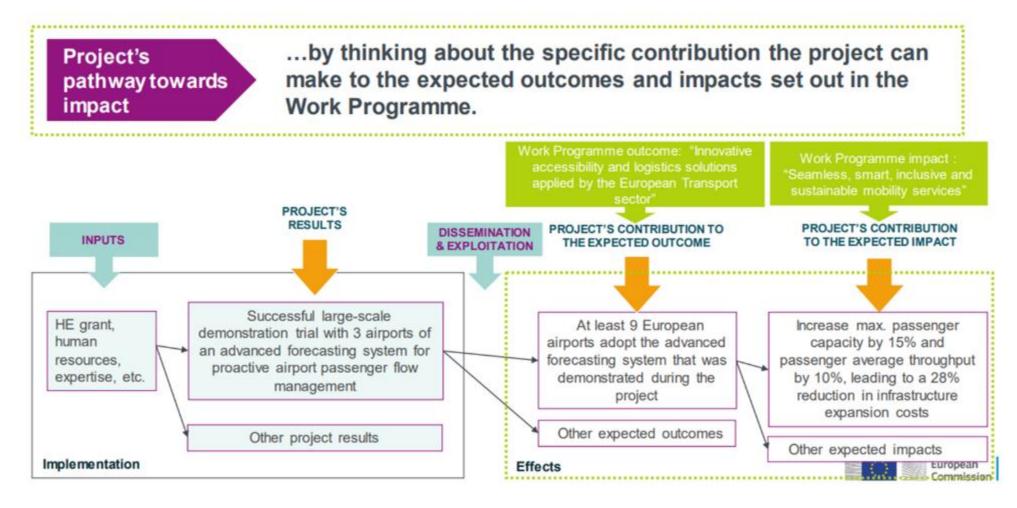


Addressing Impact – Assessment

- ✓ Explain how the project contributes to 1) expected outcomes of the topic and 2) the wider impacts, in the longer term, as specified in the respective destinations of the work programme, credible?
- ✓ Are there barriers/environmental impact? If so how will they be over come/managed?
- ✓ Are the scale and significance of the project's contribution to the expected outcomes and impacts estimated and quantified?
- ✓ Clearly explain how the proposed dissemination, exploitation and communication measures are suitable for the project and of good quality
- √ Who are the target groups and why?



Tips on how to think about Impact





The Impact Canvas – Summary Table

KEY ELEMENT OF THE IMPACT SECTION

SPECIFIC NEEDS

What are the specific needs that triggered this project?

Example 1

Most airports use process flow-oriented models based on static mathematical values limiting the optimal management of passenger flow and hampering the accurate use of the available resources to the actual demand of passengers.

Example 2

Electronic components need to get smaller and lighter to match the expectations of the end-users. At the same time there is a problem of sourcing of raw materials that has an environmental impact.

EXPECTED RESULTS

What do you expect to generate by the end of the project?

Example 1

Successful large-scale demonstrator: Successful large-scale demonstrator:

Trial with 3 airports of an advanced forecasting system for proactive airport passenger flow management.

Algorithmic model:

Novel algorithmic model for proactive airport passenger flow management.

Example 2

Publication of a scientific discovery on transparent electronics.

New product: More sustainable electronic circuits.

Three PhD students trained.

D & E & C MEASURES

What dissemination, exploitation and communication measures will you apply to the results?

Example 1

Exploitation: Patenting the algorithmic model.

Dissemination towards the scientific community and airports: Scientific publication with the results of the large-scale demonstration.

Communication towards citizens: An event in a shopping mall to show how the outcomes of the action are relevant to our everyday lives.

Example 2

Exploitation of the new product: Patenting the new product; Licencing to major electronic companies.

Dissemination towards the scientific community and industry:

Participating at conferences; Developing a platform of material compositions for industry; Participation at EC project portfolios to disseminate the results as part of a group and maximise the visibility vis-à-vis companies.

TARGET GROUPS

Who will use or further up-take the results of the project? Who will benefit from the results of the project?

Example 1

9 European airports:

Schiphol, Brussels airport, etc.

The European Union aviation safety agency.

Air passengers (indirect).

Example 2

End-users: consumers of electronic devices.

Major electronic companies: Samsung, Apple, etc.

Scientific community (field of transparent electronics).

OUTCOMES

What change do you expect to see after successful dissemination and exploitation of project results to the target group (s)?

Example 1

Up-take by airports: 9 European airports adopt the advanced forecasting system demonstrated during the project.

Example 2

High use of the scientific discovery published (measured with the relative rate of citation index of project publications).

A major electronic company (Samoung or Apple) exploits/uses the new product in their manufacturing.

IMPACTS

What are the expected wider scientific, economic and societal effects of the project contributing to the expected impacts outlined in the respective destination in the work programme?

Example 1

Scientific: New breakthrough scientific discovery on passenger forecast modelling.

Economic: Increased airport efficiency
Site: 15% increase of maximum passenger capacity in
<u>European</u> airports, leading to a 28% reduction in
infrastructure expansion costs.

cample 2

Scientific: New breakthrough scientific discovery on transparent electronics.

Economic/Technological: A new market for touch enabled electronic devices.

Societal: Lower climate impact of electronics manufacturing (including through material sourcing and waste management).

Impact

- Credibility of the pathways towards impact
- Suitability & quality of the measures to maximise expected outcomes and impact (D&E&C draft plan) including IPR
- Possibility to present a canvas



Addressing D,E & C

	Objective	Focus	Target Audience
Communication	Researching out to society Demonstrating impact and benefits	Informing about and promoting the project and the results/successes	Multiple audiences
Dissemination	Transfer of knowledge and results Aim to enable others to use and take up results	Ensure results are available and able to be used by others	Those that are interested in the potential use of the results
Exploitation	Use of project results through scientific, economical, political or societal exploitations Turn R&I actions into concrete value and impact for society	Make concrete use of results	People/organisations, including project partners that can make concrete use of the results User groups



Section 3 Implementation

Quality and effectiveness of the work plan, assessment of risks and appropriateness of the effort assigned to work packages and the resources overall

- Schedule and Description of Work Packages Use the Template
- List of Deliverables Template
- Planned Allocation of Resources by Work Package and by partner Template!

Capacity and role of each participant and the extent to which the consortium as a whole brings together the necessary expertise

- Describe the management structures and processes
- include risk and innovation management
- Management bodies (advisory or steering groups) if any.
- Decision making process Unanimity, majority vote, consensus
- Indicate critical risks and potential mitigation (bad weather, insufficient response from audience/research community, public health, etc.)
- Work Packages use the table templates!
- Mention any subcontractors



Proposal Advice

Key points

Read all call documentation and the evaluation criteria

Consider any relevant EU policy documents

Make it easy for the evaluators to find the information

Use clear and concise language

Explain country/research area specific jargon

Research previous and current projects

Find colleagues to proof read drafts with the evaluation

criteria

The proposal will take time to write



Additional Resources

UKRO Portal https://www.ukro.ac.uk/

MSCA – How to Apply

https://rea.ec.europa.eu/funding-and-grants/horizon-europe-marie-sklodowska-curie-actions/horizon-europe-msca-how-apply_en#ecl-inpage-291

MSCA-NET Handbooks (2022), Policy Briefs (Open Science, Gender, EU Missions, Green Deal)

Funding & Tender Opportunities Portal https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

Horizon Europe Strategic Plan https://op.europa.eu/en/web/eu-law-and- publications/publication-detail/-/publication/3c6ffd74-8ac3-11eb-b85c-01aa75ed71a1

Horizon Europe Programme Guide https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf

Open Science Resources OpenScience.eu, Open Science, How to evaluate open science in Horizon Europe Proposals

Gender in Research Resources <u>Genderaction.eu</u> ,<u>Gendered Innovations</u> ,<u>Gender in</u> Research







Thank you

Questions?





@_UKRO_ in UK Research Office (UKRO)