

Research and Training Projects with European Organisations

How Third Country Organisations can participate in Innovative Training Networks & Research and Innovation Staff Exchange

Geraldine Canny and Grace McCarthy
Irish MSCA Office
24th & 25th January 2018



Irish Marie Skłodowska-Curie Actions Office

The webinar will be facilitated by the Irish Marie Skłodowska-Curie Actions Office as part of the **Net4Mobility project**.

Website: [Irish MSCA Office](#)

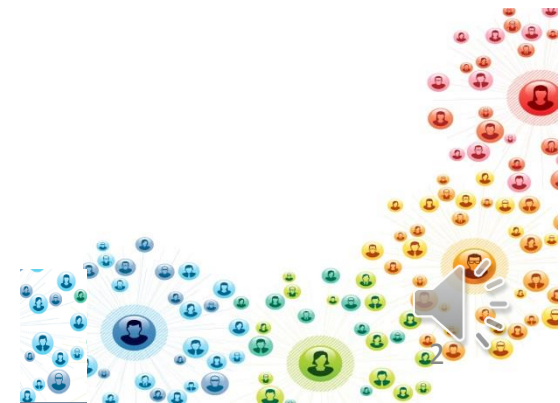
Email: mariecurie@iua.ie



Dr. Geraldine Canny: Irish National Contact Point for Marie Skłodowska-Curie Actions

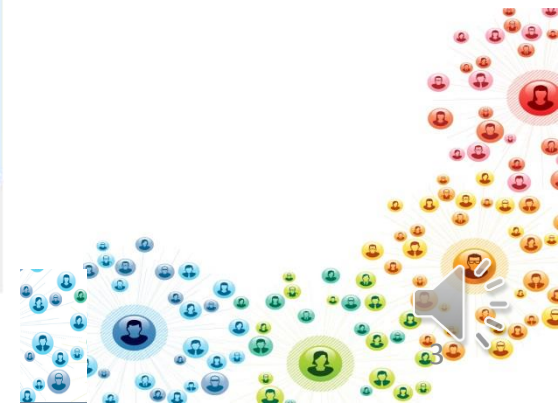


Grace McCarthy: Programme Manager for Irish Marie Skłodowska-Curie-Actions (Science Foundation Ireland Research Centres)



Net4Mobility is the worldwide network of National Contact Points for Marie Skłodowska-Curie Actions

<https://net4mobility.eu>



Presentation Content

1. Overview of MSCA

- Marie Skłodowska-Curie Actions in Horizon 2020
- Marie Skłodowska-Curie Actions: Annual Calls
- Marie Skłodowska-Curie Actions Key Terms
- Funding for Third Country (TC) Organisations

2. MSCA-Innovative Training Networks (MSCA-ITN)

3. MSCA-Research and Innovation Staff Exchange (MSCA-RISE)



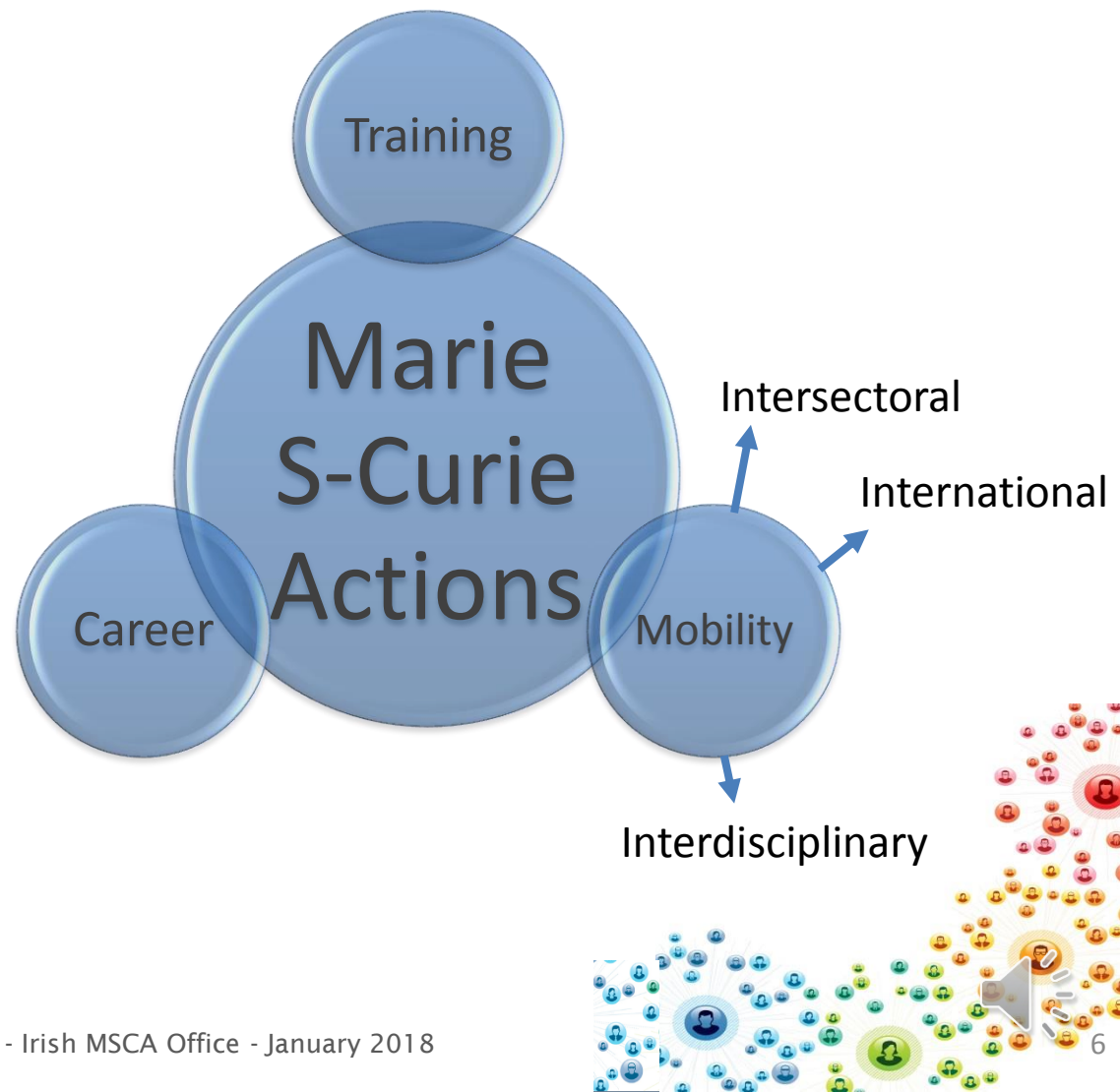
Marie Skłodowska-Curie Actions in Horizon 2020

Horizon 2020 - the Framework Programme for Research and Innovation (2014-2020)



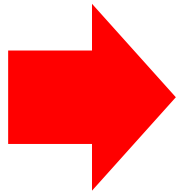
Marie Skłodowska-Curie Actions in Horizon 2020

- **€6.2 billion budget**
- In the **Excellence Science** Pillar
- Funds **ALL RESEARCH AREAS** (no thematic calls or priorities)
- Implemented via Annual Calls for Proposals



Marie Skłodowska-Curie Actions: Annual Calls

Call	Call Deadline
Individual Fellowships (IF)	12 Sep 2018 11 Sep 2019
Innovative Training Networks (ITN)	17 Jan 2018 15 Jan 2019
Research & Innovation Staff Exchange (RISE)	21 Mar 2018 02 Apr 2019
COFUND-Co-funding of regional, national and international programmes	27 Sep 2018 26 Sep 2019



Marie Skłodowska-Curie Actions Key Terms

1. Participating Organisations in a MSCA Consortium:

- Coordinator
- Beneficiary
- Partner organisations

2. Types of sectors:

- Academic organisations
- Non-academic organisations

3. Country Categories:

- Member States (MS)
- Associated Countries (AC)
- Third Countries (TC)



MSCA Key Terms: 1. Participating Organisations

Beneficiary

- Legal entity that signs the grant agreement, receives funding, claims costs.
- Have responsibility for the implementation of the action.

Coordinator

- The beneficiary in the consortium who is the central contact point of the project. They are responsible for the submission of the ITN proposal and overall coordination and successful delivery of the project.

Partner Organisation

- Does not sign the grant agreement and cannot directly claim costs.
- Contributes to the implementation of the action.

MSCA Key Terms: 2. Types of Sectors

Academic

- Public or private higher education establishments awarding academic degrees.
- Public or private non-profit research institutes whose primary mission is to pursue research.

Non-academic

- Socio-economic actors not included in the academic sector e.g. industry, government, charitable organisations, cultural institutions, hospitals, international organisations etc.



MSCA Key Terms: 3. Country Categories

Member States (MS)

Eligible for funding

- Member states of the European Union (EU), including their overseas departments.

Associated Countries (AC)

Eligible for funding

- International agreement with the Union, more information:
http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cpart/h2020-hi-list-ac_en.pdf

Non-Associated Third Countries (TC)

Eligible for funding under different circumstances

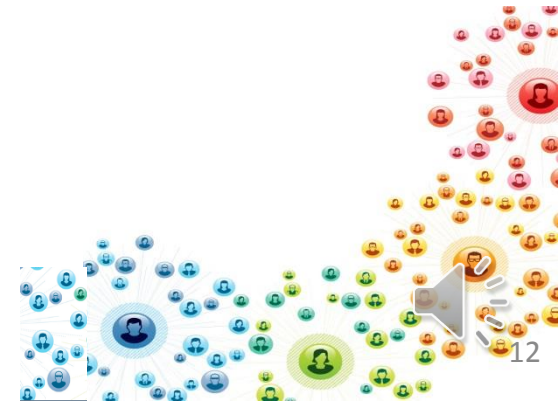
- Neither EU Member States nor countries associated to Horizon 2020 (Associated Countries)

Funding for Third Country (TC) Organisations

Third country funding participation is based on:

1. TCs listed in the General Annex A of the relevant Work Programme

2. TCs not listed in General Annex A of the relevant Work Programme

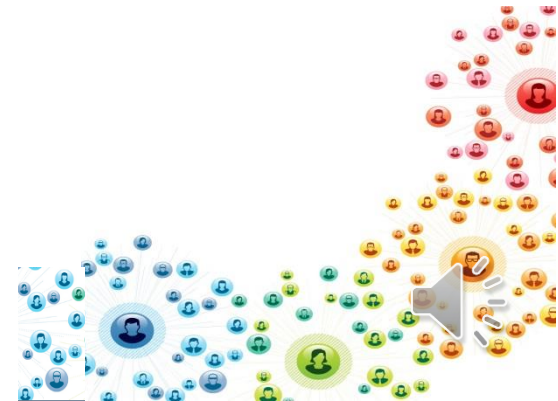


Funding for Third Country (TC) Organisations

1. TCs listed in the [General Annex A of the relevant Work Programme](#)



Eligible to receive funding



Funding for Third Country (TC) Organisations

2. TCs not listed in [General Annex A of the relevant Work Programme](#)

Eligible to receive funding
in 2 exceptional cases:

1. Participation is deemed essential
due to clear benefits such as:

- Outstanding competence/expertise
- Research infrastructure
- Particular geographical environments
- Access to data

2. Funding is provided for under a
[bilateral scientific and technological agreement](#)

Not eligible for funding

Partner
Organisation



MSCA ITN: Innovative Training Networks

Deadline

15th January 2019

Joint **research and training** programme for early stage researchers (pre PhD) implemented through a network of organisations in **different countries & sectors.**



ITN Participating Organisations

Beneficiary

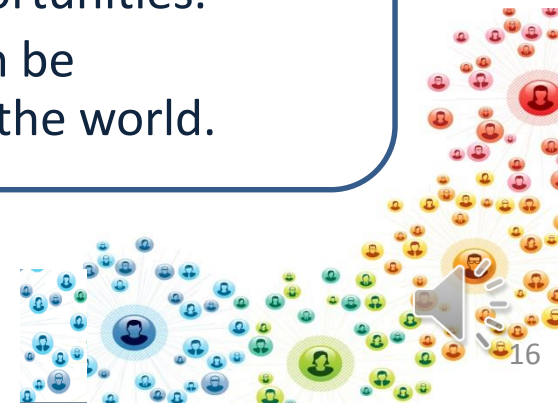
**Sign grant agreement,
claim costs, receive
funding**

- Contribute directly to the research, transfer of knowledge and training activities by recruiting, supervising, hosting and training early stage researchers.

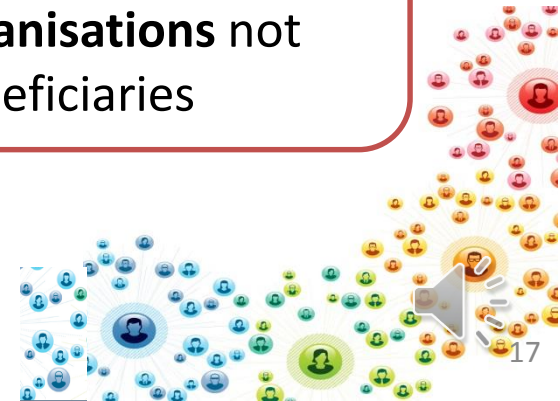
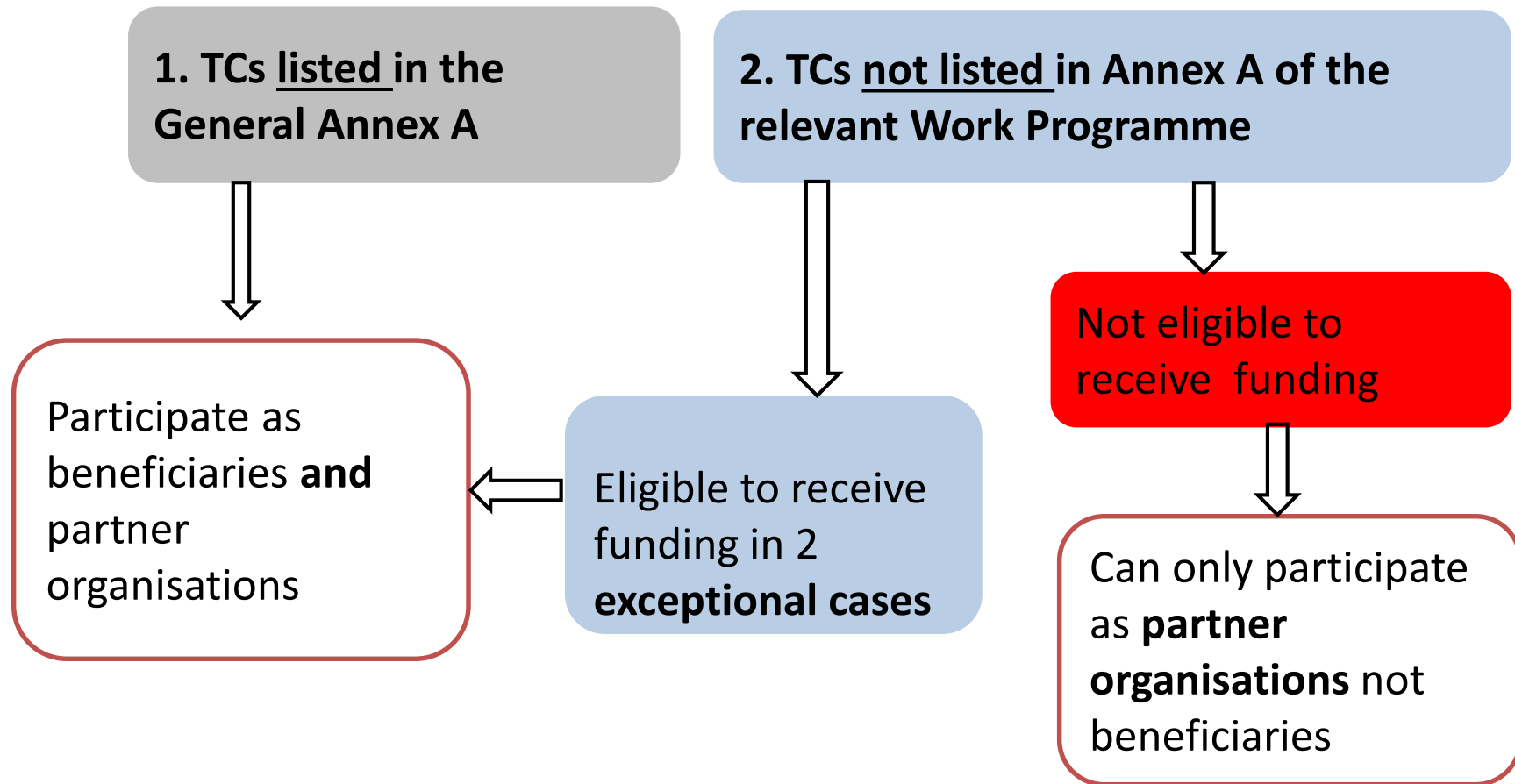
Partner Organisations

**Do not sign grant
agreement or claim
costs directly**

- Complement the ITN through providing additional research & transferable skills and/or secondment opportunities.
- Partner organisations can be established anywhere in the world.



Summary: ITN Funding for Third Country (TC) Organisations



Definitions for ITNs

Early-stage researchers (ESRs)

Less than 4 years research experience (from the date they obtained the degree entitling them to embark on a doctorate) and **have not been awarded a doctoral degree.**

Mobility rule for early stage researchers

The ESRs must not have lived or carried out their main work/studies in the country of the recruiting beneficiary for more than **12 months in the 3 years** before the recruitment date.

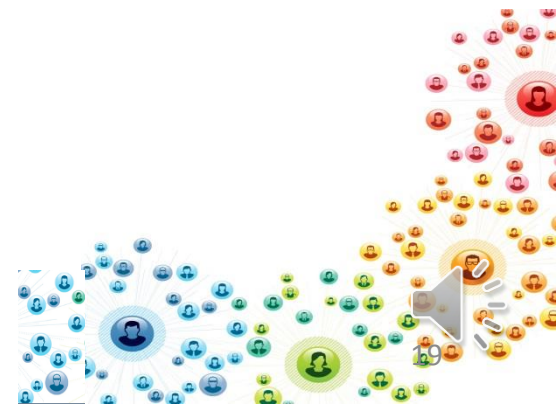
Secondment in ITNs

A secondment is **research training which takes place at a different beneficiary or partner organisation.** The duration of a secondment is limited to a maximum of 30% of the research training.

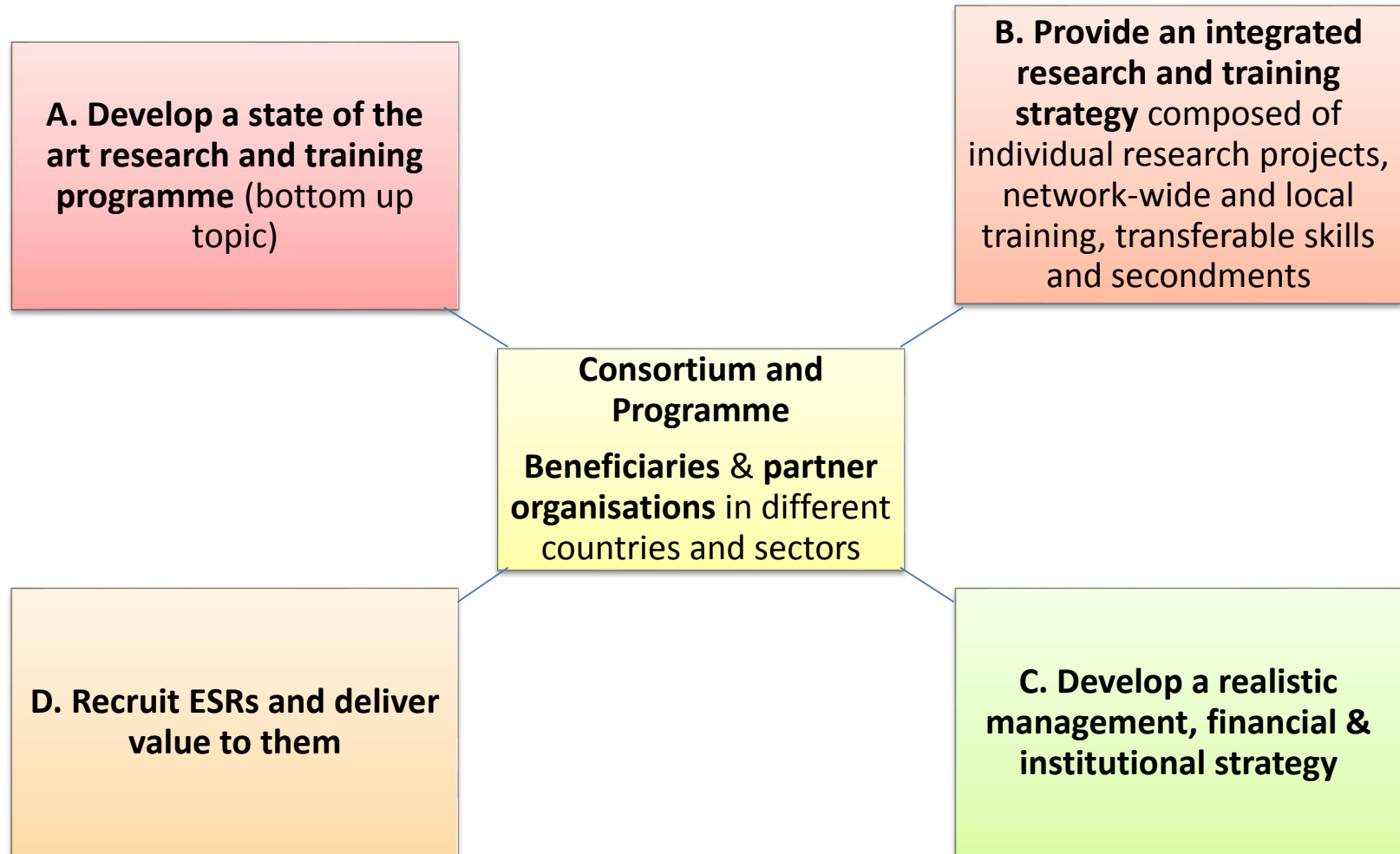


ITN success rates

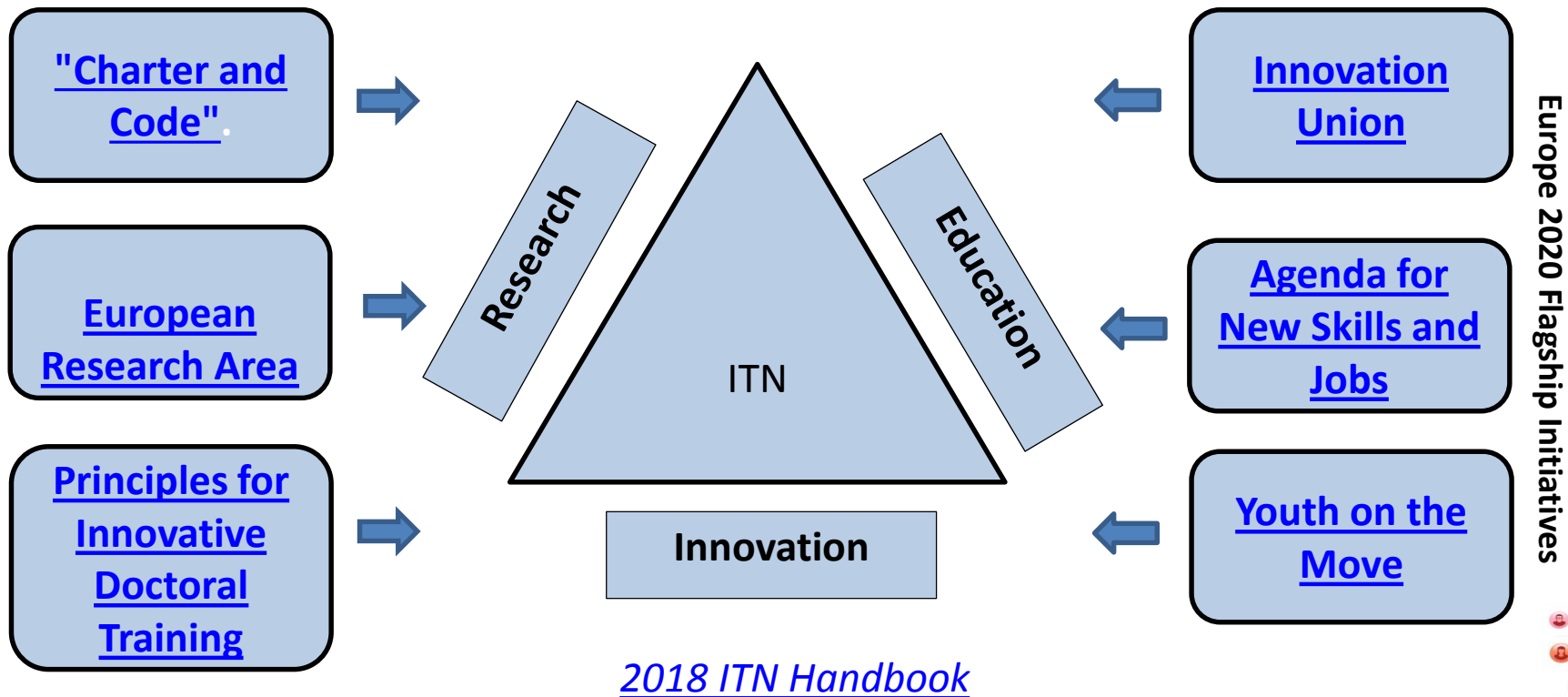
2017 ITN	ETN	EJD	EID	ALL
IE Success Rate	8%	50%	0%	8%
EU Success Rate	7%	3.2%	10.2%	7.4%



ITN Quality Components



ITN Policy Context



3 Types of ITN

What are the similarities?

- Project duration of 48 months
- Application process (slide 24)
- Optional secondments for 30% of ESR recruitment

**European
Training
Network (ETN)**

**European
Industrial
Doctorate (EID)**

**European
Joint Doctorate
(EJD)**



3 Types of ITN

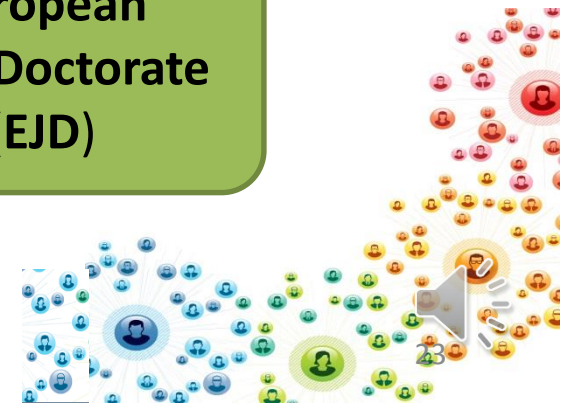
**European
Training
Network (ETN)**

What are the differences?

- Consortium composition requirements
- Doctoral requirements
- Intersectoral requirements

**European
Industrial
Doctorate (EID)**

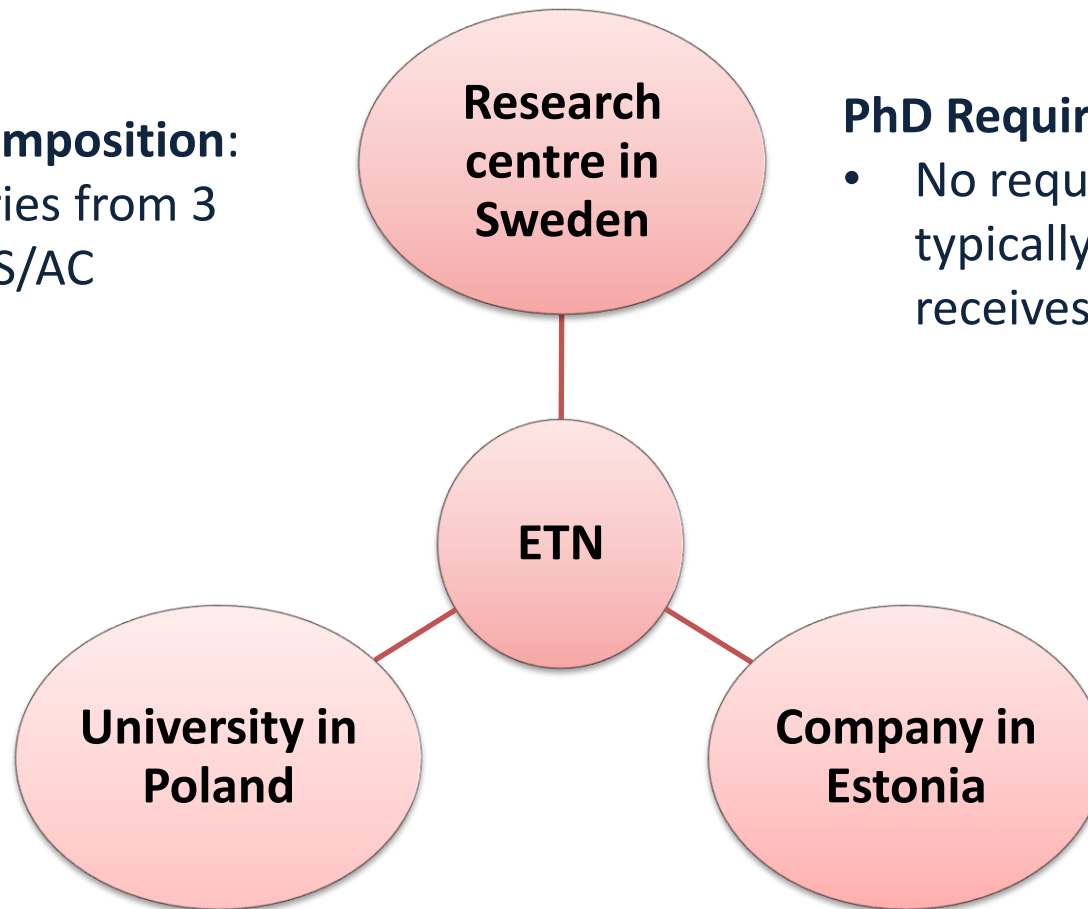
**European
Joint Doctorate
(EJD)**



European Training Network: Minimum Requirements

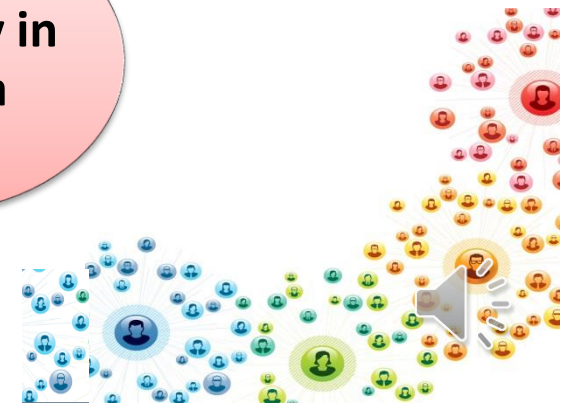
Consortium Composition:

- 3 beneficiaries from 3 different MS/AC



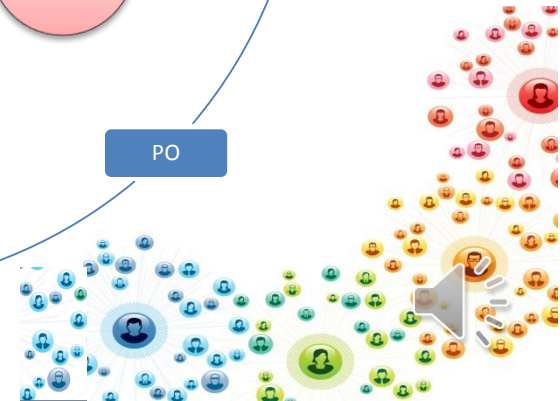
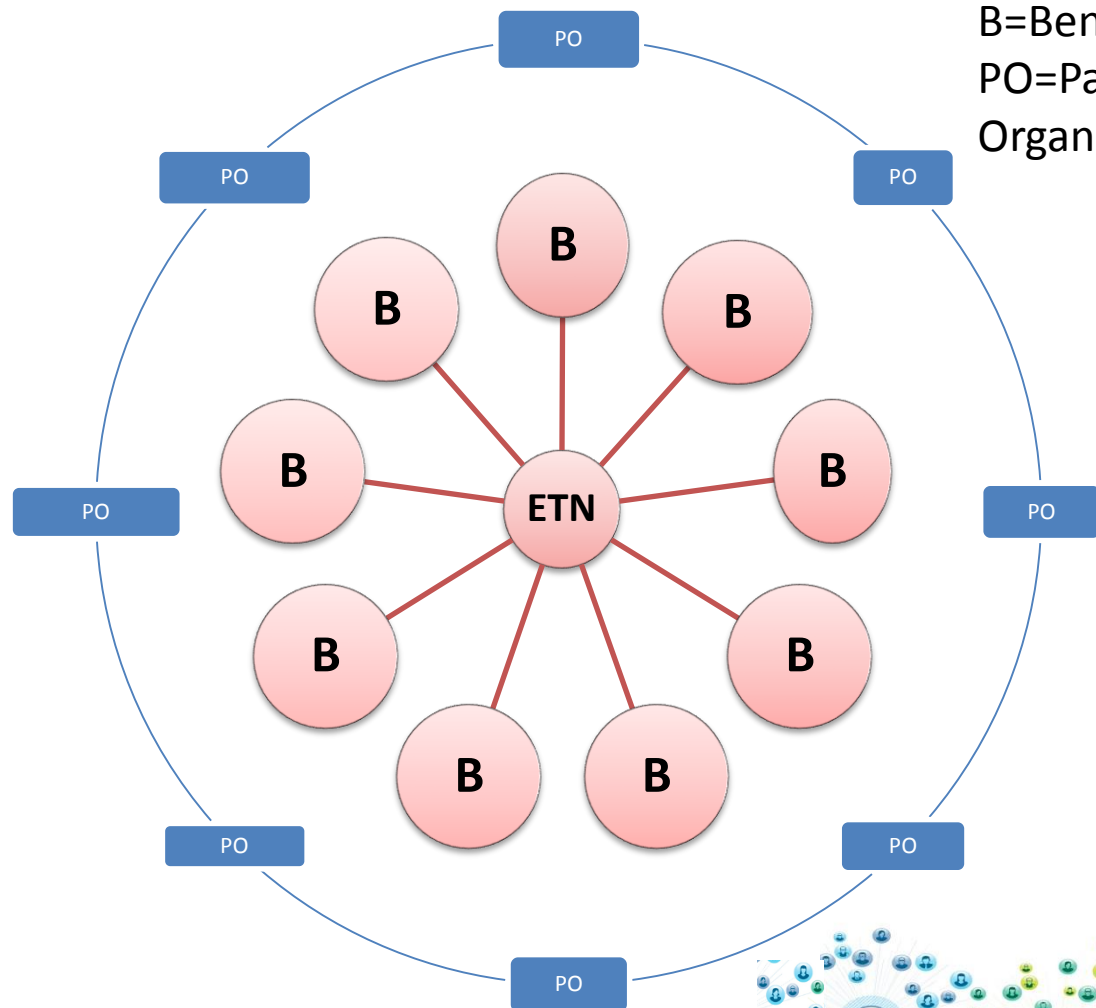
PhD Requirement:

- No requirement but typically each ESR receives a doctorate



Typical Size of a European Training Network

- A typical ETN contains **6-10 beneficiaries** recruiting 10-15 ESRs for 36 months.
- The number of POs varies depending on the project.
- For example, each beneficiary may include a secondment PO for each ESR recruited.



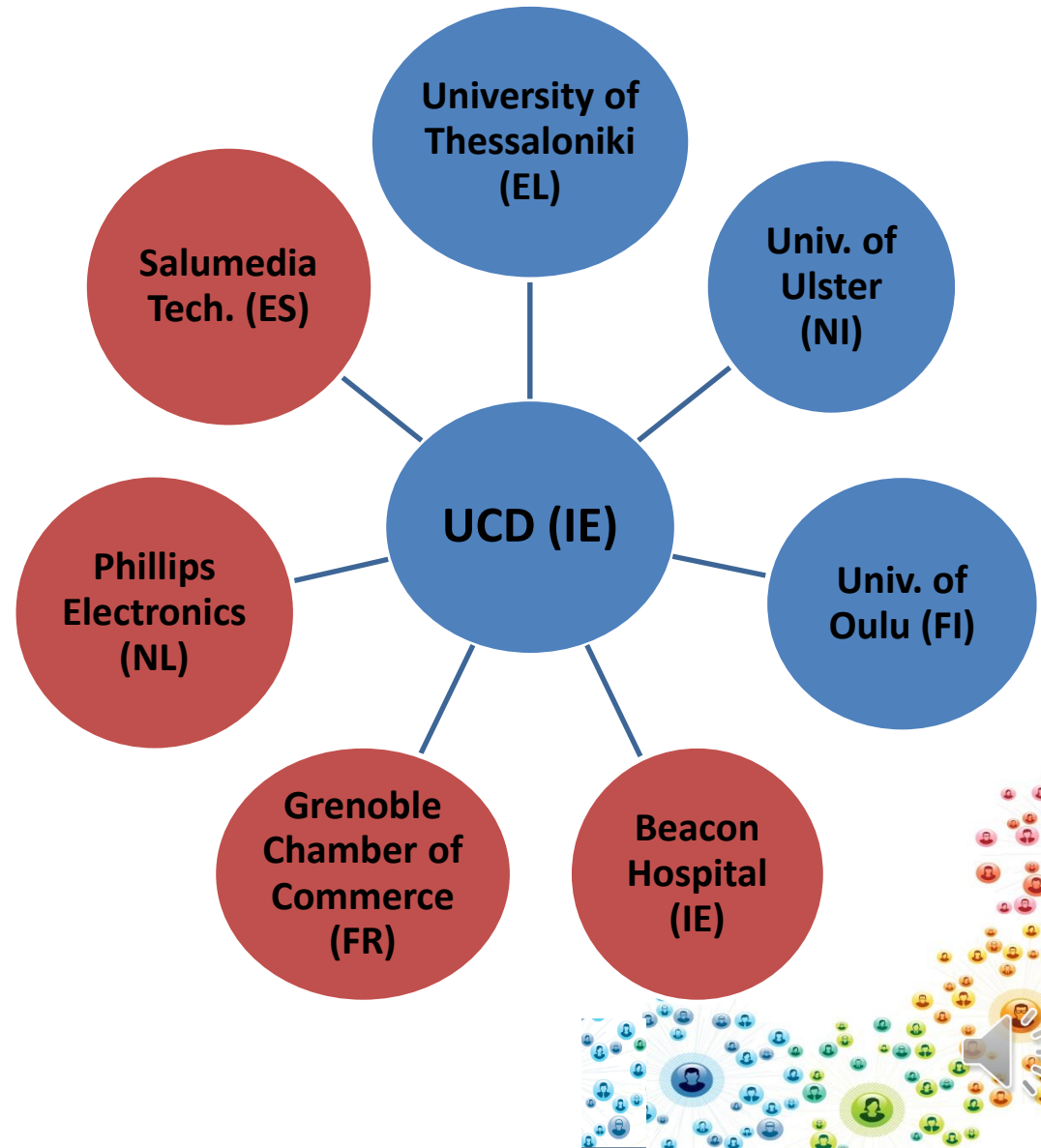
European Training Network Example

CHES

“Connected Health Early Stage Researcher Support System”

€3.95 million

- 8 Beneficiaries
- 10 Partner Organisations



European Industrial Doctorate: Minimum Requirements

Consortium Composition:

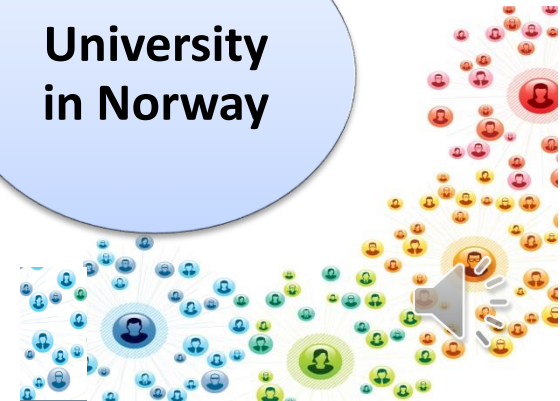
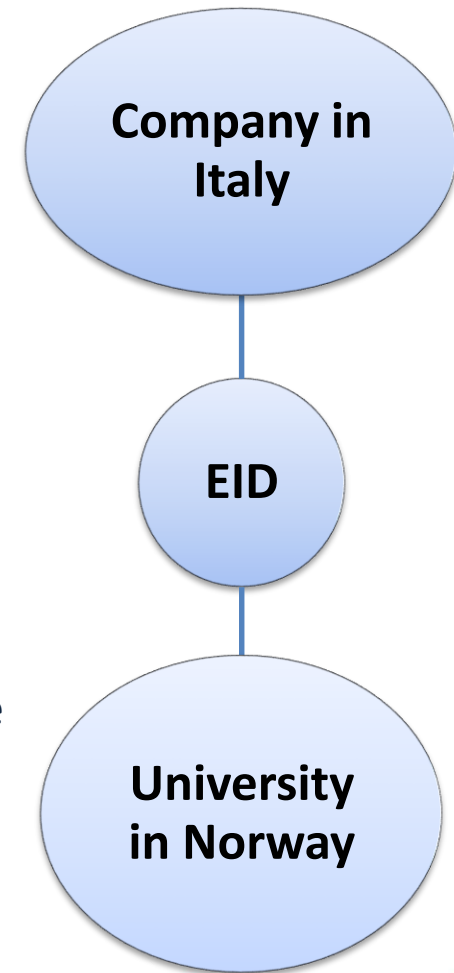
- 2 beneficiaries from 2 different MS/AC
- 1 doctoral awarding institution
- 1 non-academic institution

PhD Requirement:

- Each ESR receives a doctorate

Intersectoral:

- Must spend at least 50% of time in non-academic sector
- **Additional beneficiaries and partner organisations:** More beneficiaries can be added from MS, AC or TC eligible for funding. Partner organisations can be established anywhere in the world.



European Joint Doctorate: Minimum Requirements

Consortium Composition:

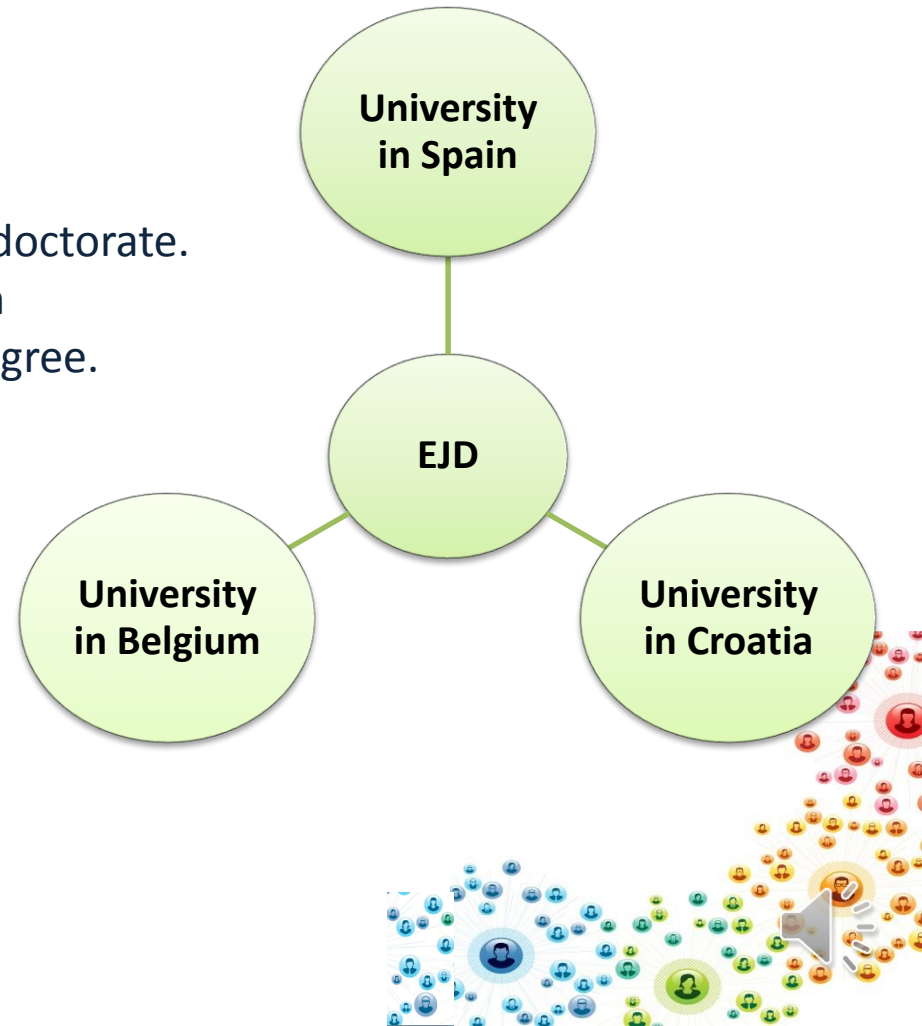
- 3 beneficiaries from 3 different MS/AC
- 3 doctoral degree awarding organisations.

PhD Requirement:

- Two-thirds of ESRs complete a joint/double doctorate.
- The ESRs will need to spend the time in each beneficiary required to receive a doctoral degree.

Additional beneficiaries and partner organisations

- More beneficiaries can be added from MS, AC or TC eligible for funding. Partner organisations can be established anywhere in the world.



Summary Types of ITN: Minimum Requirements

European Industrial Doctorate

2 beneficiaries from:
2 countries in MS/AC & 2
sectors:
1 doctoral degree awarding
1 non-academic

Doctorate required

Must spend at least 50% of
time in non-academic sector

European Training Network

**3 beneficiaries
from:**
3 countries in
MS/AC

No educational
requirement
(PhD typical)

No intersectoral requirement but strongly
encouraged

European Joint Doctorate

3 beneficiaries from:
3 doctoral degree
awarding institutions
3 countries in MS/AC

Joint/double
doctorate



ITN Funding Model

Categories of eligible costs				
1. Researcher unit costs PER MONTH			2. Institutional unit costs PER MONTH	
Living allowance (gross amount)	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs
€3,270	€600	€500	€1,800	€1,200

- The EU contribution under the Marie Skłodowska-Curie actions is based on unit costs expressed in person-months.
- [The country coefficient](#) applies to the living allowance. This coefficient is the one applicable to the country of the beneficiary, as listed in Table 2 in the MSCA work programme.



ITN Submission

Proposals must be submitted electronically by the coordinator, through the call page on the Participant Portal. **All 3 parts are submitted together:**

	Information	TC Contribution
1. Part A	Administrative forms	• Organisation information • Participant Identification Code (PIC) required
2. Part B1	1. Excellence, 2. Impact, 3. Implementation	Contribution to the relevant parts of the application
3. Part B2	4. Gantt Chart 5. Capacities of Participating orgs. 6. Ethical issues 7. Letters of Commitment	5. Capacities table 7. Provide a letter of commitment (if a partner organisation)



ITN Proposal Template

Part B1 - max. 30 pages

Score weighting (50%)

Score weighting (30%)

Score weighting (20%)

1. Excellence Section

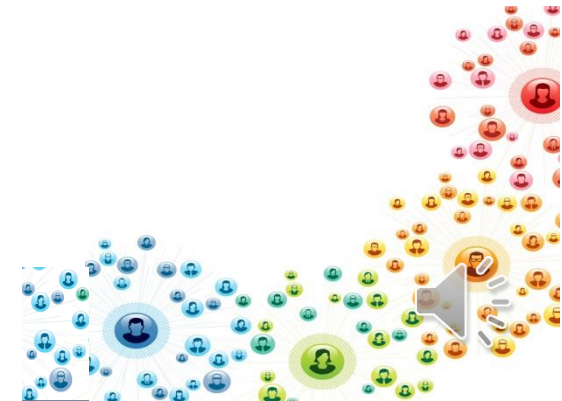
1.1
1.2
1.3
1.4

2. Impact Section

2.1
2.2
2.3
2.4

3. Implementation Section

3.1
3.2
3.3
3.4



Part B1 – Excellence Section (50%)

1.1

Quality, innovative aspects and credibility of the **research programme**

1.2

Quality and innovative aspects of the **training programme**

1.3

Quality of the **supervision**

1.4

Quality of the proposed interaction between the **participating organisations**



ITN Proposal Template

Impact Section (30%)

2.1

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

2.2

Contribution to structuring doctoral/early-stage research training at the EU level and to strengthening EU innovation capacity

2.3

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

2.4

Quality of the proposed measures to **communicate the activities to the target audiences**



ITN Proposal Template

Implementation Section (20%)

3.1

Coherence and effectiveness of the **work plan**

3.2

Appropriateness of the **management structure and procedures**

3.3

Appropriateness of the infrastructure of the participating organisations

3.4

Competences, experience and complementarity of the **participating organisations** and their **commitment** to the programme



ITN Cross-Cutting Issues

Gender

- Gender balance should be evident in management structure and supervision and amongst the recruited ESRs
- How gender can affect the research work or dissemination/communication activities

Open Science

- Open access to research publications
- Management of research data (DMP)
- Open publication of research data (where appropriate)

Communication & Dissemination

- Communication is not the same as Dissemination
- Dissemination is towards potential users (research peers, industry, policymakers)
- Communication is to multiple audiences, including the media and the public

Responsible Research and Innovation

- Adhering to ethics rules
- Ensuring that the research is performed with integrity - avoiding fabrication, falsification and plagiarism

Sustainable Development and Climate Action

- As a large portion of the H2020 budget will address these themes, refer to them if appropriate



Useful Resources

Gender	http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/gender_en.htm
Open Science & DMPs	http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/open-access-dissemination_en.htm
Dissemination & Communication	http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/communication_en.htm
Responsible Research & Innovation	https://ec.europa.eu/programmes/horizon2020/en/h2020-section/responsible-research-innovation https://www.rri-tools.eu/
Intellectual Property	https://www.iprhelpdesk.eu/sites/default/files/newsdocuments/Fact-Sheet-IP-Management-in-H2020-MSCAs.pdf



More Information on ITNs

<u>ITN Guide for Applicants</u>	- It can also be downloaded on the <u>ITN call page on the participant portal</u>. <i>ITN 2019 GFA will be released in 2018.</i>
Training and information	Each year training and information documents are prepared for consortiums submitting ITN proposals: <u>Presentations from ITN Information Day in Brussels</u> <u>IUA training documents including Handbook</u>
Existing ITN Projects	Existing ITN projects can be found on the EU Commission's <u>Projects & Results Service</u>. Filter the programme to MSCA ITN
Partner Search	Find partners among organisations involved in Horizon 2020 on the European Commission's <u>partner search portal</u>
Contact your MSCA NCP	<u>http://www.net4mobility.eu/ncp-contacts.html</u>



FAQ of ITN TC Involvement

Innovative Training Networks (ITN) FAQ

Are beneficiaries from countries with a bilateral S&T agreement with the EU eligible for funding in an ITN?

- In case an ITN wishes to have a third country beneficiary from one of the countries with an S&T Agreement with the EU, they should ensure a very convincing description of the contribution in the proposal. [Here](#) are all countries with bilateral S&T Agreements listed, e.g. the US, Australia, Japan, China, India etc.

Can organisations located in third countries participate in ITNs?

- Organisation located in Third countries can participate as beneficiaries if they are eligible for funding (see slide 17)
- If they are not eligible Third country organisations can always participate as partner organisations



Applying to Existing ITNs

There are a number of existing fully funded ITNs running that cover a variety of research areas!

Who can be recruited into a running ITN?

Early stage researchers from **anywhere in the world** as long as they meet the mobility rule (slide 18). **ESRs may, in agreement with the supervisor and beneficiary implement their project on a part-time basis**

What does it mean if I am recruited into an ITN?

Undertake **research project** with an **international network** of academic and non-academic organisations and receive **state of the art research skills** and **transferable skills** throughout the duration of the programme (typically 36 months).

What ITNs are recruiting ESRs?

All ITN vacancies are published on [EURAXESS Jobs and Funding Portal](#)



MSCA RISE: Research & Innovation Staff Exchange

Deadline

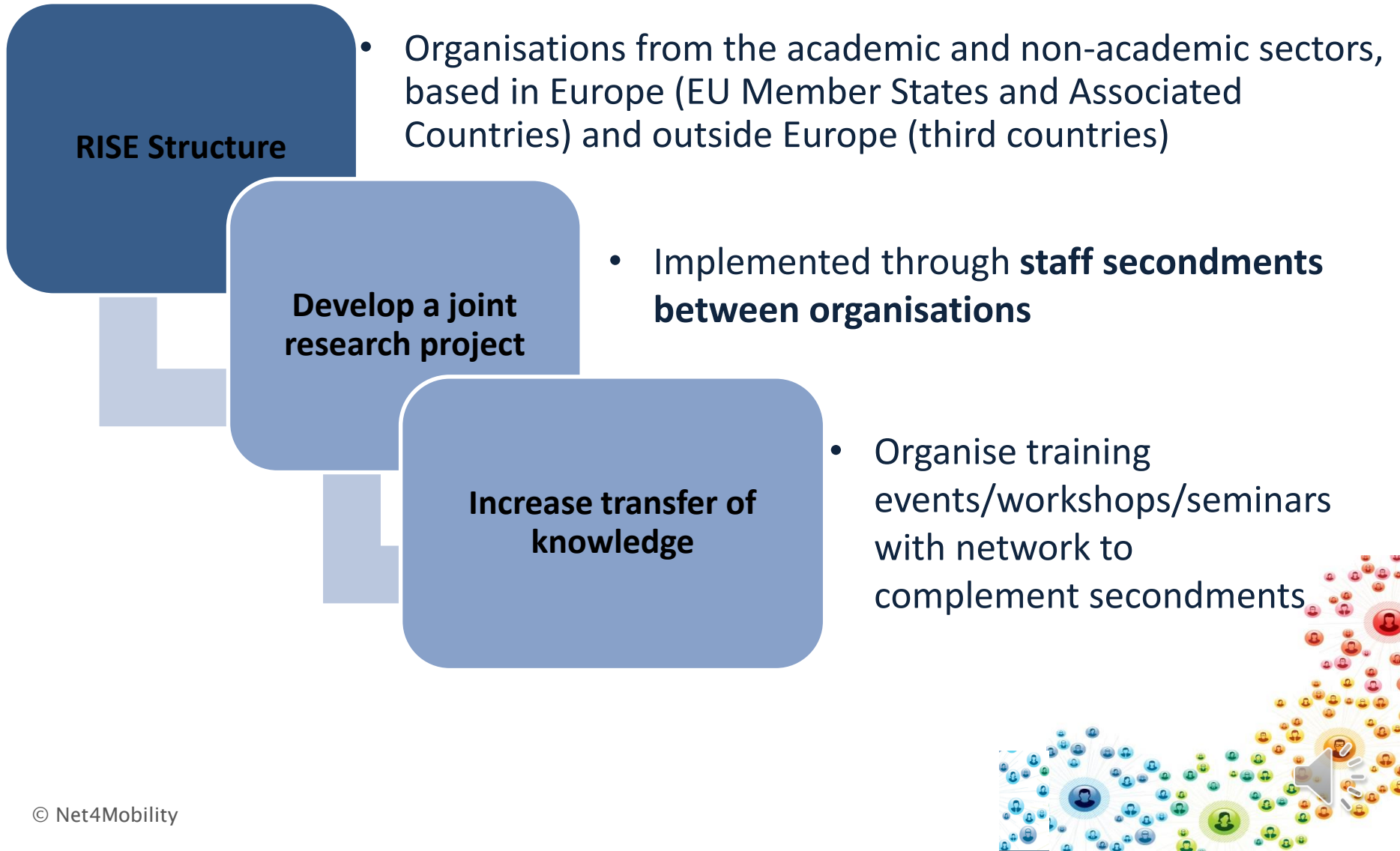
21 Mar 2018

02 Apr 2019

- Research project aimed to **transfer knowledge** between countries, sectors and disciplines implemented via **staff secondments**.



MSCA RISE: How it works



RISE Participating Organisations

Beneficiary

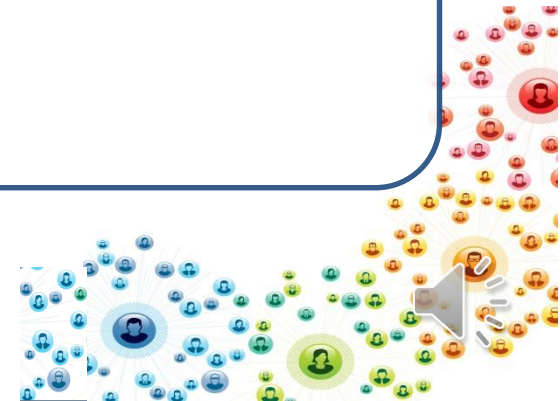
Sign grant agreement,
claim costs, receive
funding

- Organisations in Europe (MS/AC)
- Contribute directly to the RISE project
- Host and second staff members

Partner Organisations

Do not sign grant
agreement or claim costs
directly

- Organisations in TC only
- Contribute directly to the RISE project
- Host secondments
- Second staff members



MSCA RISE: Research & Innovation Staff Exchange

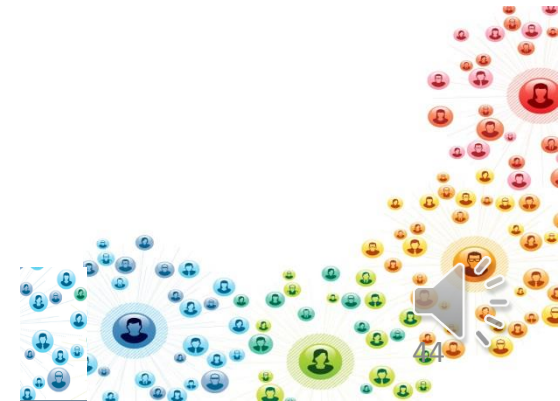
RISE Duration: 2 – 4 years' duration

Consortium Minimum Requirements

- Number of participating organisations
- Countries
- Sectors

RISE Secondments

- Goal of RISE secondments
- Eligible staff members
- Secondment duration
- Eligibility of secondments



RISE Consortium : 3 Minimum Requirements:

1. Participating Organisations

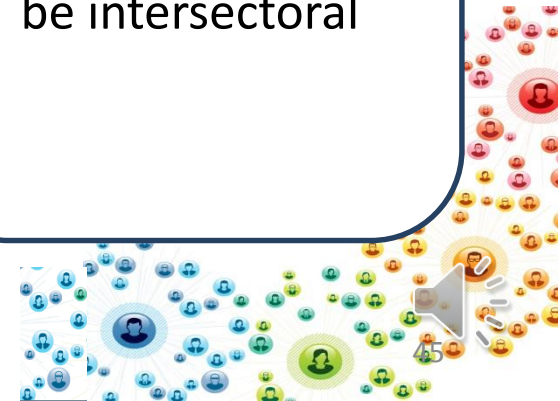
Minimum 3 participating organisations independent of each other

2. Countries

3 different countries, of which at least 2 must be different European countries (MS and/or AC)

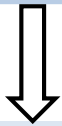
3. Sectors

Secondments between European (MS/AC) organisations must be intersectoral



RISE Secondments: Goal

RISE secondments are sending staff members to other participating organisations to achieve two short-term goals of the RISE action



Goal 1.

Staff members perform tasks to achieve the objectives of the proposed R&I action



Goal 2.

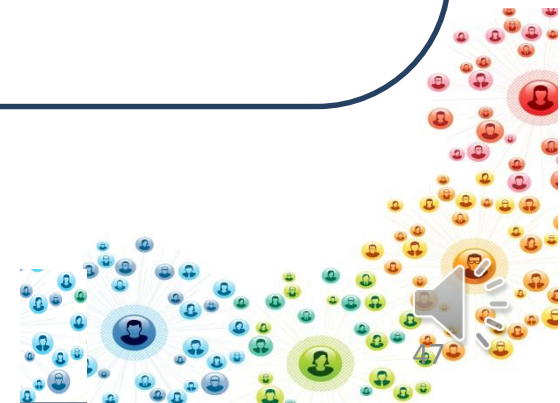
Staff members develop new R&I and transferable skills to boost future career opportunities through the RISE action and connected networking activities



RISE Secondments

Staff Members Eligible for a Secondment

- Early-stage researchers (less than 4 years research experience and no PhD)
- Experienced researchers (more than 4 years research experience or have a PhD)
- Administrative, managerial, technical staff supporting the R&I activities of the action.



RISE Secondments

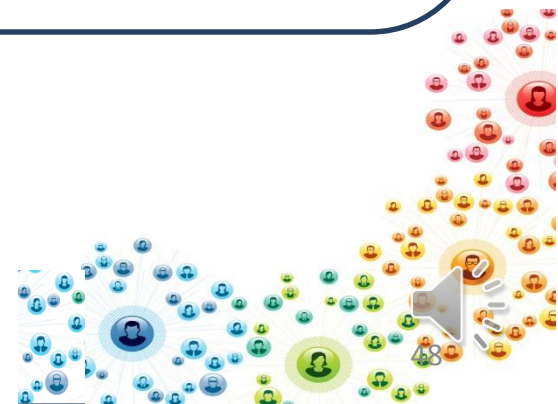
Secondment Duration

Duration per staff member:

- Maximum 12 months
- Minimum of 1 month

Funding is provided to project per secondment-month of each staff member

A maximum of 540 PM of EU funded secondments per action.



RISE Funding Model

RISE Eligible Costs (100% covered)		
1. Researcher unit costs (per secondment month)	2. Institutional unit costs (per secondment month)	
Top-up allowance *	Research, training and networking costs	Management and indirect costs
€2,100	€1,800	€700

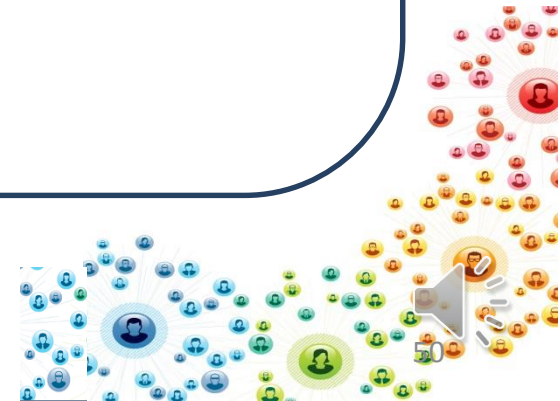
- The budget is calculated automatically by calculating the secondment Person-Month(s) (PM) by staff members.
- The RISE funding is allocated to the **coordinator** who distributes the contribution to each **beneficiary** according to their secondment person-Month(s) (PM) by staff members to other participating organisations.



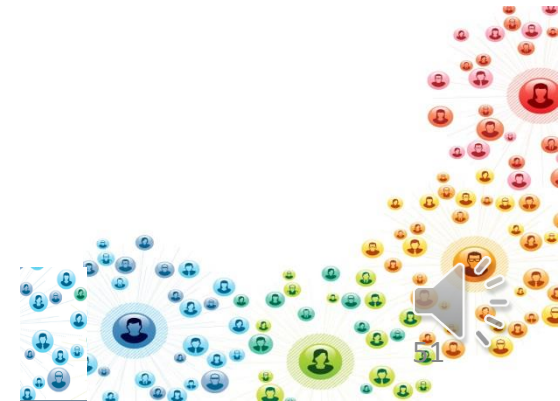
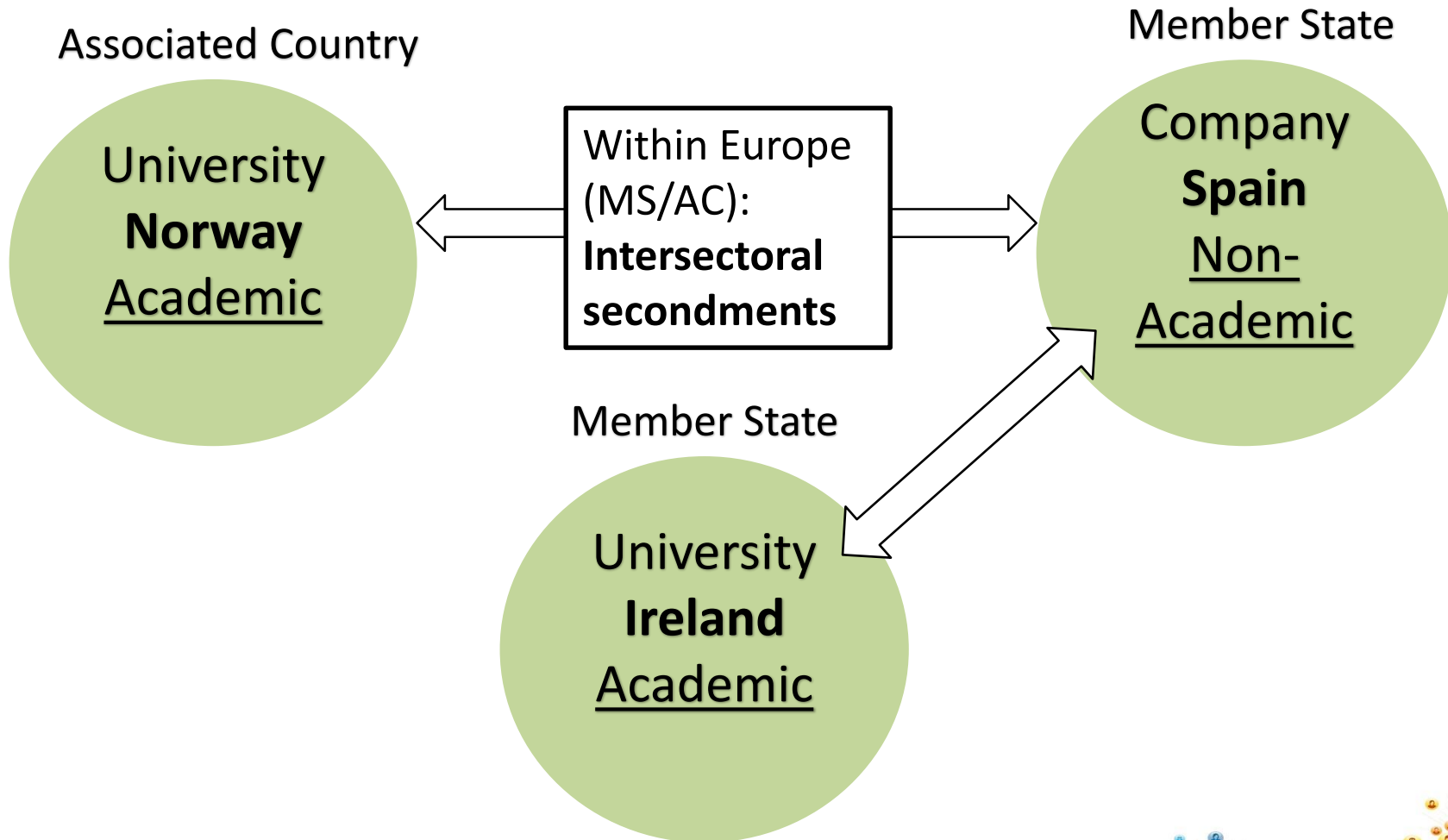
RISE Secondments

Eligible Secondments

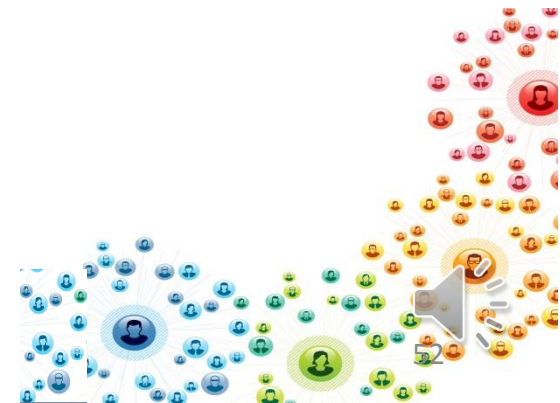
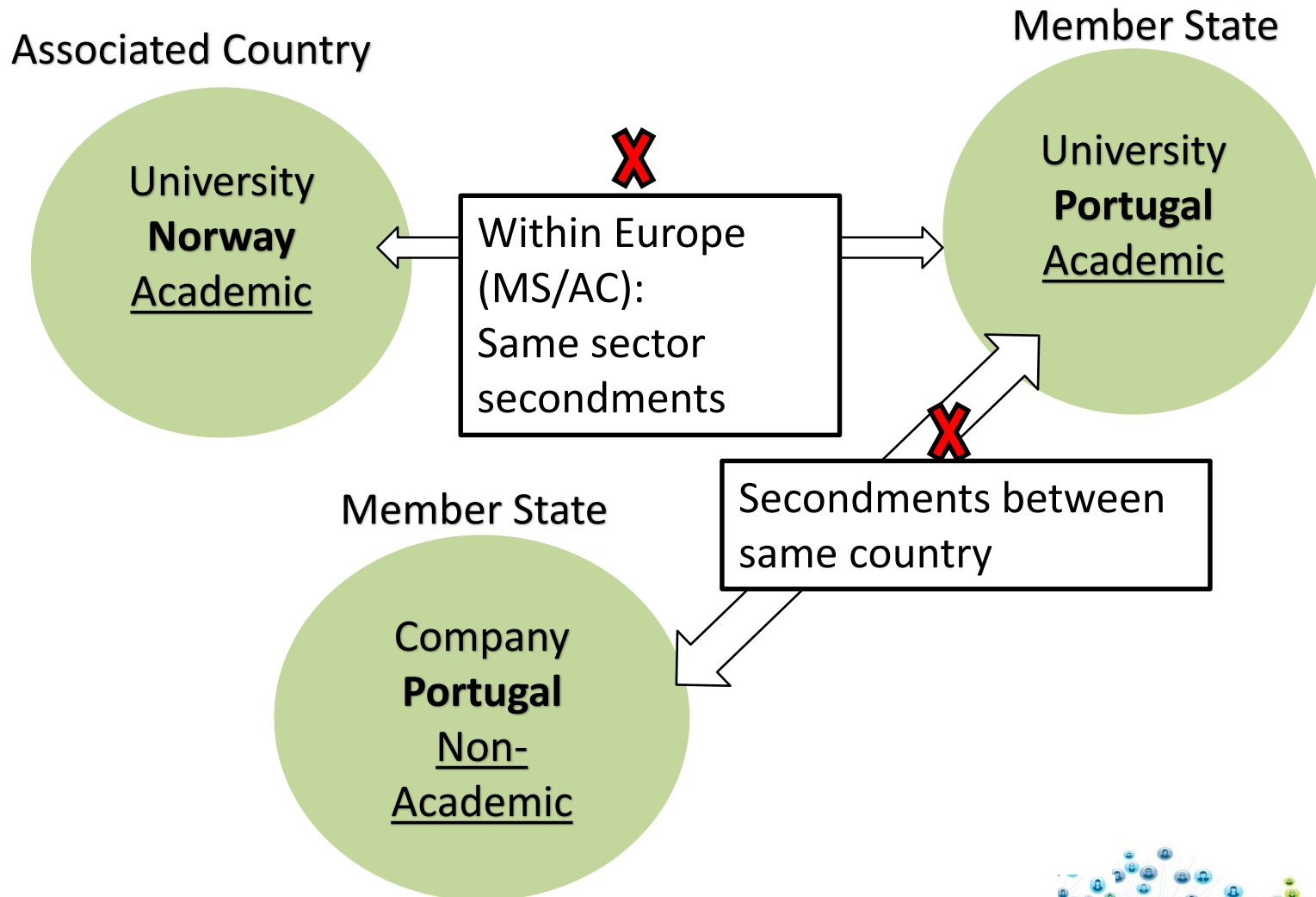
- Intersectoral secondments between organisations in Europe (MS/AC)
- Secondments between Europe (MS/AC) and TC to any sector
- The same staff member can be seconded to different hosting organisations
- No conditions on the distribution of secondments between participating organisations
- In-built return



RISE Eligible European Secondments



RISE Ineligible European Secondments



RISE Eligible TC Secondments

Associated Country

University
Norway
Academic

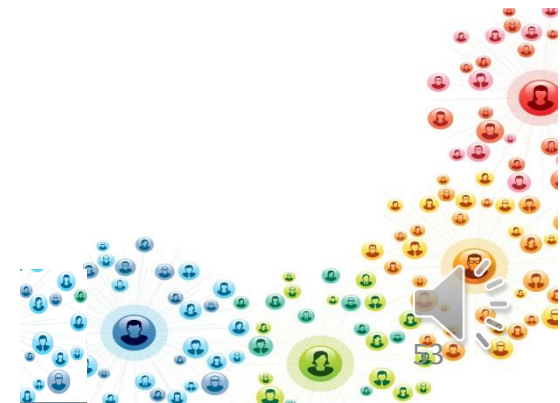
Member State

University
Spain
Academic

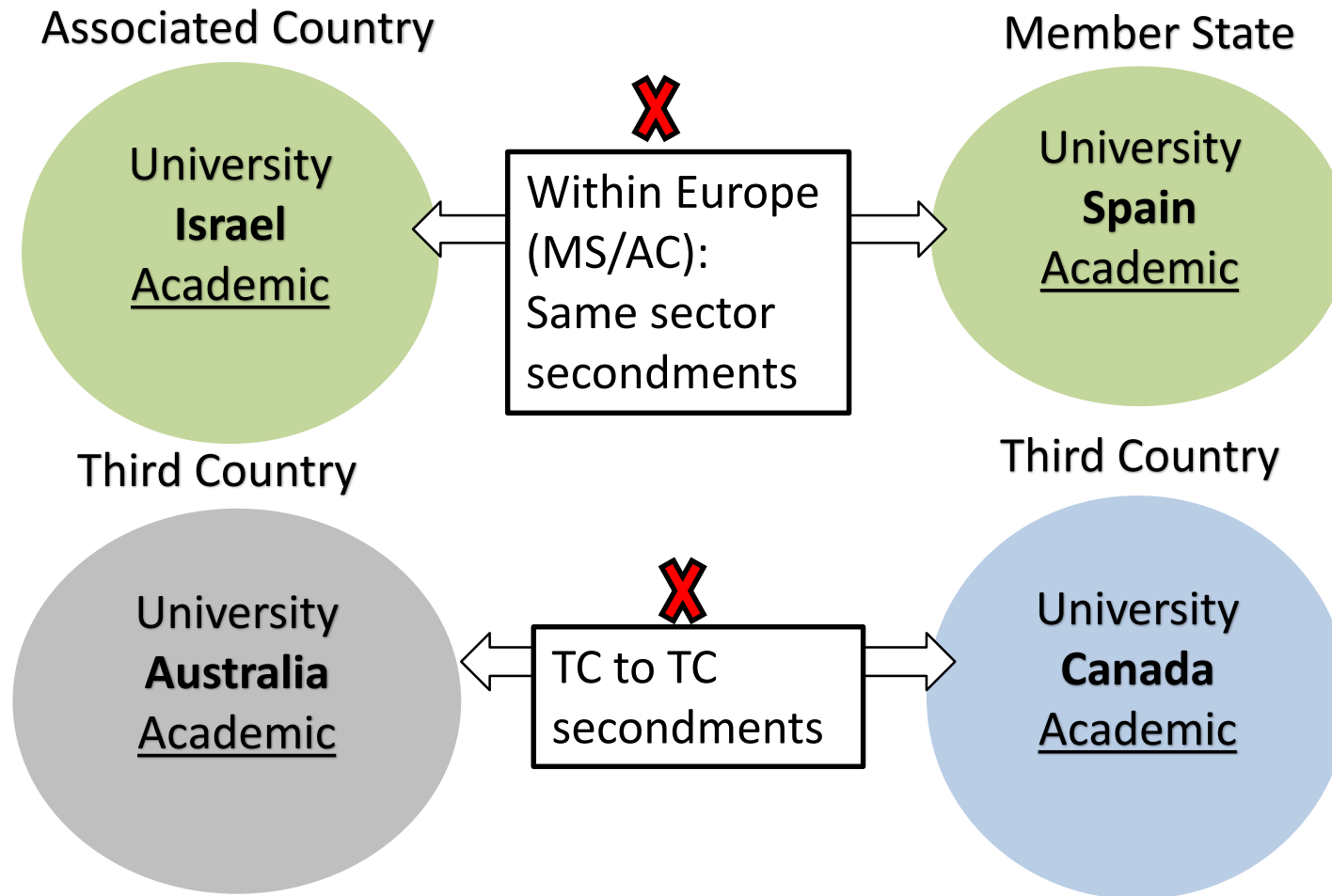
- TC to Europe (MS/AC) between any sector
- Europe (MS/AC) to TC between any sector (see funding eligibility)

Third Country

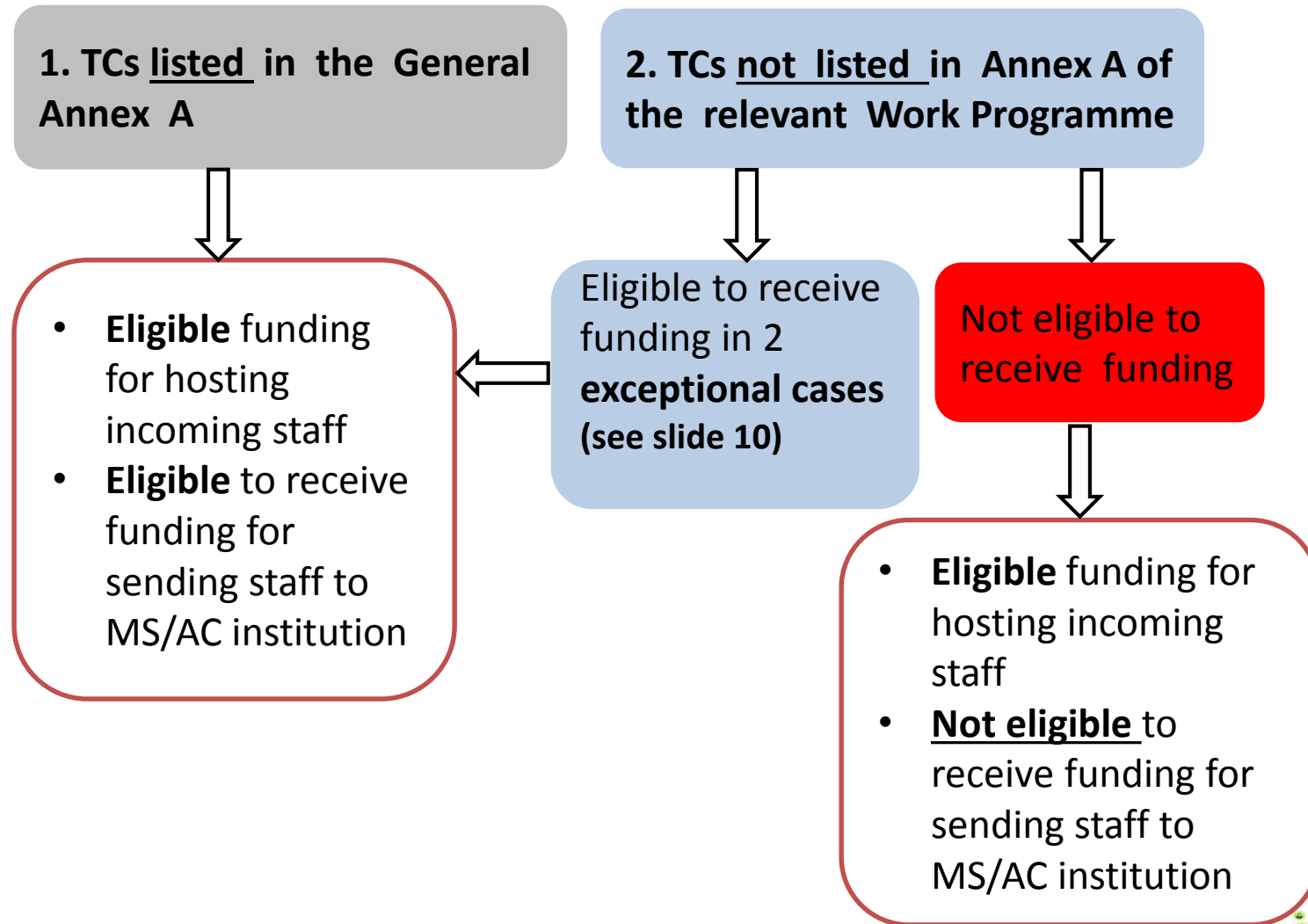
University
Argentina
Academic



RISE Ineligible TC Secondments



Funding for Third Country (TC) Organisations



RISE Eligible TC Funding under Annex A

Associated Country

Member State

University
Norway
Academic

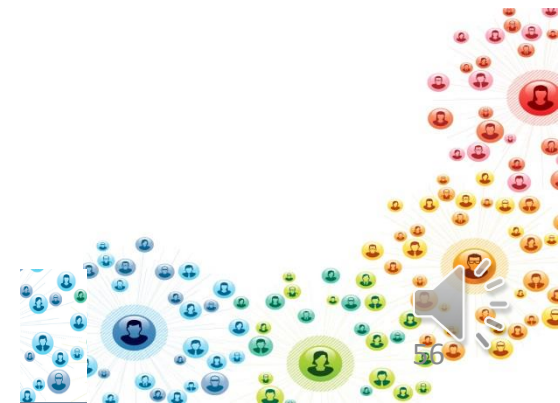
Research
Centre
Spain
Academic

- **TC staff secondments to Europe (MS/AC):** eligible for funding under **Annex A of WP 2018-2019**

- **Europe (MS/AC) secondment to TC:** eligible for funding

Third Country

University
Indonesia
Annex A
country
Academic



RISE for TC not in Annex A

Associated Country

Member State

University
Norway
Academic

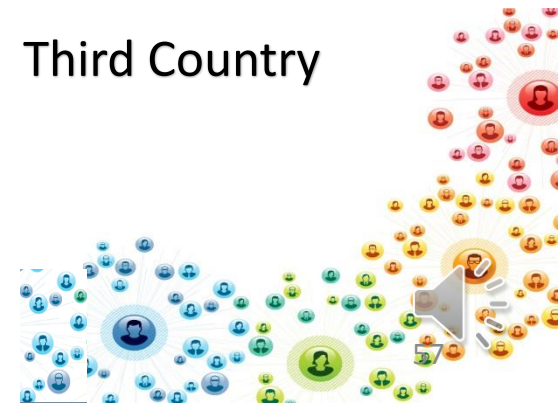
Research
Centre
Spain
Academic

- **TC staff secondments to Europe (MS/AC):** not eligible for funding ,except for exceptional cases (slide 50)

- **Europe (MS/AC) secondment to TC:** eligible for funding

University
Canada
Academic

Third Country



RISE: Can a Third Country not listed in Annex A of the WP participate in RISE?

Yes. However, the secondments **from TC** are not funded unless the participation of the TC is deemed essential for carrying out the action (see slide 11, 21, 22)

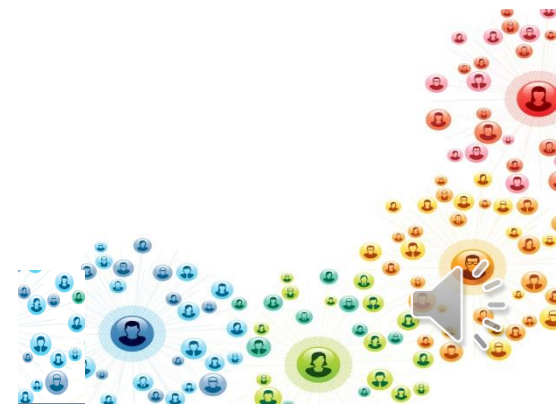
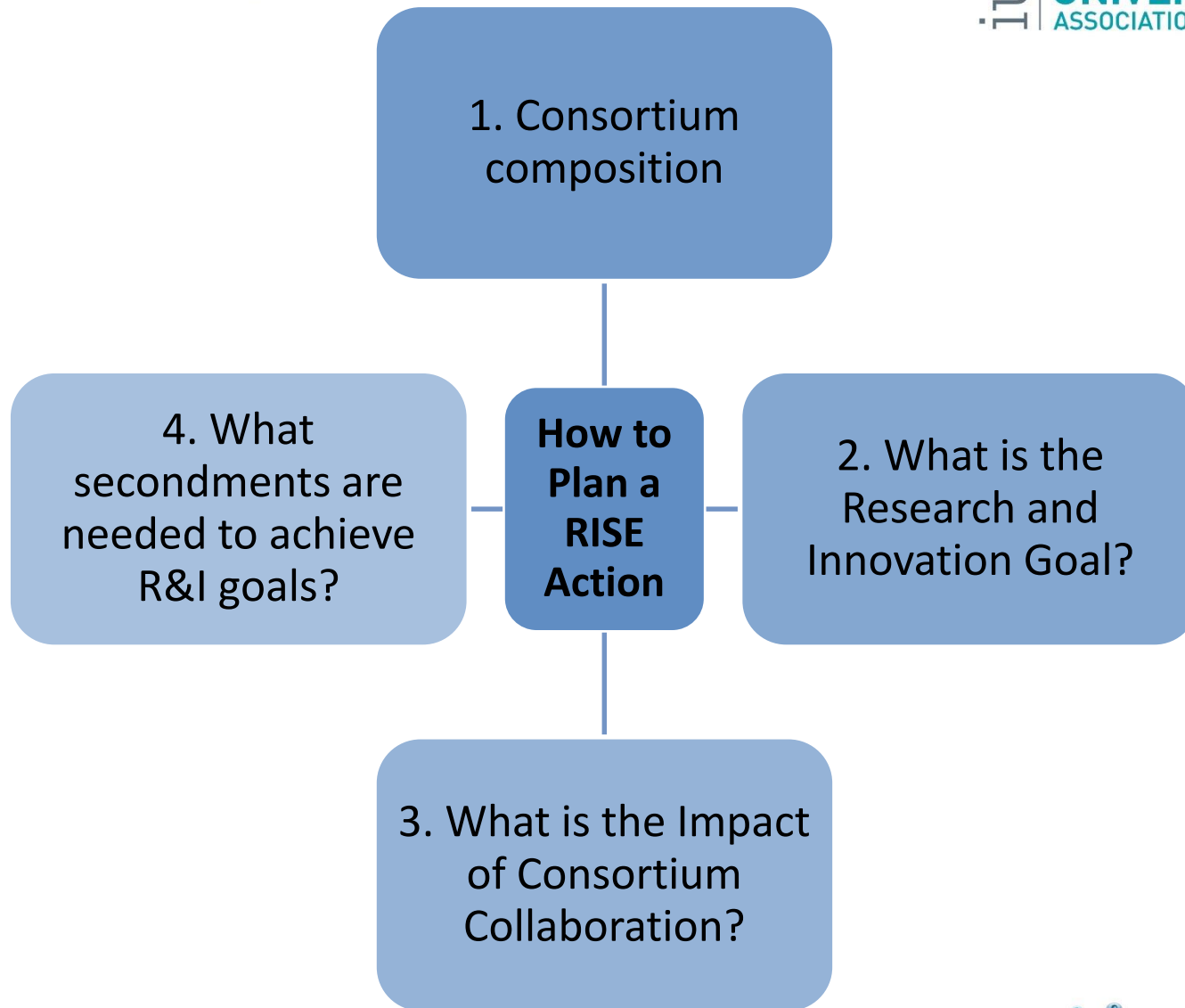
How does financing of those organisations in TC who are eligible for funding work?

The coordinator distributes the contribution for secondments from TC partners to its organisation. For the sending organisation established in MS/AC, the EU contribution can be transferred to the TC. It is highly encouraged to define these financial arrangements in a partnership agreement to determine clear and transparent rules governing the internal relations between MS/AC beneficiaries and TC partner organisations

Can Third countries not eligible for funding secondments from TC receive a percentage of the institutional cost (research and management)?

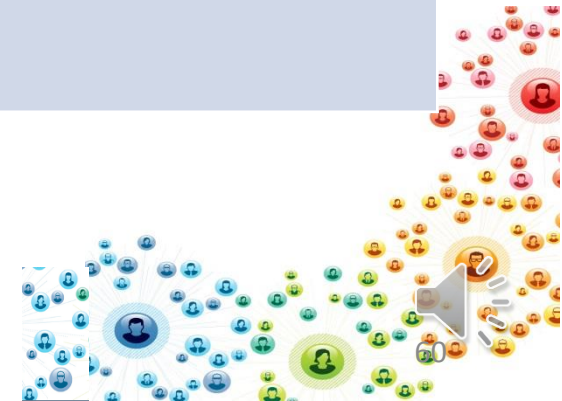
No. The beneficiaries must co-finance the action by supporting the costs not reimbursed by the EU (in that case, the secondments from TC not eligible for funding). However, institutional costs can be used to cover general networking (where partners from TC not eligible for funding are also involved).





Proposals must be submitted electronically by the coordinator, through the call page on the Participant Portal. **All 3 parts are submitted together:**

	Information	TC Contribution
1. Part A	Administrative forms	TC organisation information
2. Part B1	Sections 2. Excellence, 3. Impact, 4. Implementation	Contribution to the relevant parts of the application
3. Part B2 Section 5-8	4. References 5. Capacities of Participating org. 6. Ethical issues 7. Letters of Commitment of TC Partner organisations	5. Section 5 table 7. Letter of commitment



Score weighting (50%)

2.Excellence Section

2.1
2.2
2.3

Score weighting (30%)

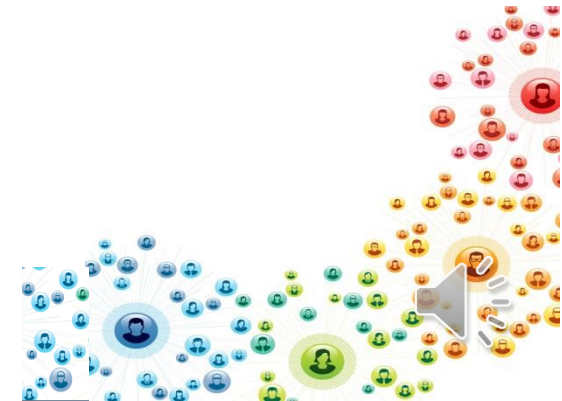
3. Impact Section

3.1
3.2
3.3
3.4

Score weighting (20%)

**4. Implementation
Section**

4.1
4.2
4.3
4.4



RISE Proposal Template

Part B1 – Excellence Section (50%)

2.1

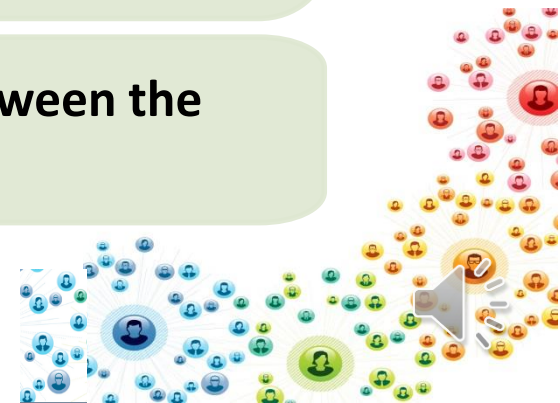
Quality and credibility of the **research/innovation action**

2.2

Quality and appropriateness of **knowledge sharing among the participating organisations**

2.3

Quality of the proposed **interaction between the participating organisations**



RISE Proposal Template

Part B1 – Impact Section (30%)

3.1

Enhancing the potential and future career prospects of the staff members

3.2

Developing **new and lasting research collaborations**, **achieving transfer of knowledge** between participating organisations and **contribution to improving research and innovation potential** at the European and global levels

3.3

Quality of the proposed measures to exploit and disseminate the action results

3.4

Quality of the proposed measures to communicate the action activities to different target audiences



RISE Proposal Template

Part B1 – Implementation Section (20%)

4.1

Coherence and effectiveness of the work plan

4.2

Appropriateness of the management structures and procedures

4.3

Appropriateness of the institutional environment (hosting arrangements, infrastructure)

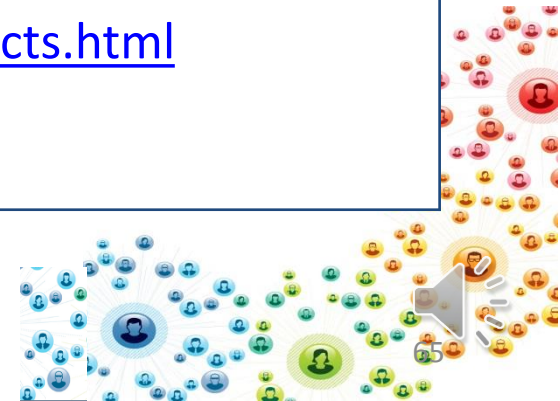
4.4

Competences, experience and complementarity of the participating organisations and their commitment to the action



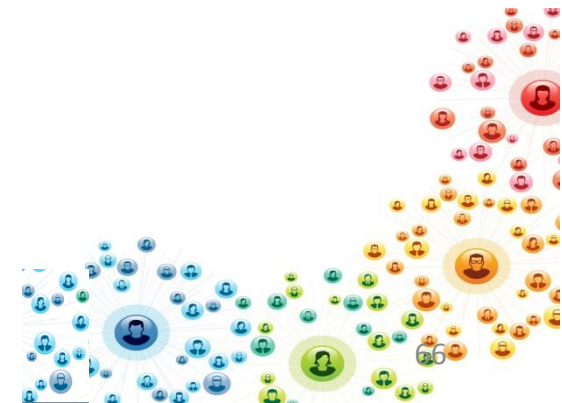
More Information on RISE

<u>RISE Guide for Applicants</u>	- Can also be downloaded on the <u>RISE 2018 call page on the Participant Portal</u> <i>RISE 2019 GFA will be released in 2018.</i>
Training & info	<u>RISE Information day</u>
Existing RISE Projects	Existing RISE projects can be found on the EU Commissions <u>Projects & Results Service</u>. Filter the programme to MSCA RISE
Partner Search	Find partners among organisations involved in Horizon 2020 on the European Commission's <u>partner search portal</u>
Contact your MSCA NCP	<u>http://www.net4mobility.eu/ncp-contacts.html</u>



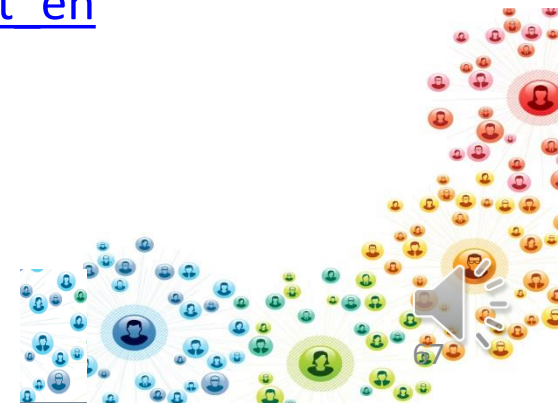
More support and information on MSCA

- MSCA National Contact Points in your host country can be found at the following link:
<http://www.net4mobility.eu/ncp-contacts.html>
- Contact research support offices in your organisations or potential host organisations for MSCA Individual Fellowships for support
- Bilateral EU Cooperation Projects
<http://www.bilat.eu/>



More support and information on MSCA

- MSCA National Contact Points in your host country can be found at the following link: <http://www.net4mobility.eu/ncp-contacts.html>
- Contact research support offices in your organisations or potential host organisations for MSCA Individual Fellowships for support
- Bilateral EU Cooperation Projects <http://www.bilat.eu/>
- More information of Marie Skłodowska-Curie actions (MSCA) https://ec.europa.eu/research/mariecurieactions/about_en



More support and information on MSCA

[EURAXESS](#) is a unique pan-European initiative delivering information and support services to researchers. It helps researcher mobility and career development, while enhancing scientific collaboration between Europe and the world.

[EURAXESS Jobs and Funding Portal](#) can help you with job offers and funding opportunities

[EURAXESS Worldwide](#) is a networking tool supporting researchers working outside of Europe who wish to connect or stay connected with Europe.

EURAXESS Hosting Agreements

If you plan to visit Ireland for the purpose of your research **EURAXESS Ireland** can help you with your visa and immigration/work permission. They operate a fast track immigration scheme known as 'Hosting Agreement' which offers a number of benefits, such as:
Exemption from a work permit, and Immediate family reunification

For more info visit our website : <https://www.euraxess.ie> or email: mobility@iua.ie



Thank you for Listening

If you have more queries please
email mariecurie@iua.ie

