Building and writing a competitive Marie Skłodowska-Curie Innovative Training Network (ITN) project proposal

Module 5
Writing a project
Proposal (2)

We have limited resources so I'm going to suggest we only fund projects that work really well.

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We will cover the most important sections of the proposal for ETN

First of all: stick to the page limits and use the correct template!!!!

TABLE OF CONTENTS

In drafting PART B of the proposal, applicants <u>must</u> follow the structure outlined below.

START PAGE
LIST OF PARTICIPANTS

START PAGE COUNT

1. EXCELLENCE
2. IMPACT
3. IMPLEMENTATION

STOP PAGE COUNT

4. GANTT CHART
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
6. ETHICAL ISSUES
7. LETTERS OF COMMITMENT

30 pages strict limit!!

Evaluators will be strictly instructed to disregard any content above this limit.

1. Excellence

1.1. Quality, innovative aspects and credibility of the research programme (including inter/multidisciplinary and intersectoral aspects)

Required sub-headings	Tips
Introduction, objectives and overview of the research programme.	☐ What is the main R&D&I objective of your project? ☐ What are the secondary R&D&I objectives of your project? ☐ How your project combine different scientific and technological disciplines? ☐ How the individual projects of the ESRs fit into those objectives?
Research methodology and approach	☐ Based and coherently with your WP structure HOW the main and secondary objectives will be achieved? ☐ In other words what are the concrete steps?
Originality and innovative aspects of the research programme	☐ What makes your project unique with respect of existing initiatives? Industry demand? Social impact? Etc…cite concrete examples especially on how the technology will be applied and demonstrated. ☐ What makes your project unique with respect to existing curricular training? Multidisciplinary aspects? Not offered in any European academic centre? Directly targeting industry demand? ☐ How the project, training and network will help ESRs in the job market?

You should educate the evaluator in this section about why your project compared to others she/he may read outstands.

1.2 Quality and innovative aspects of the training programme

Required sub-headings	Tips
Overview and content structure of the training (ETN)	Coherently with your WP structure and specially WP Training: ❏ What the beneficiary and partnering organizations are offering locally as part of the training (seminars, workshops, etc). ❏ What and how the consortium as a whole is offering as network-wide training? ❏ Why and how this overall training structure is innovative with respect to enhancing the job opportunities for the ESRs?
Role of non-academic sector in the training programme	❏ How industrial partners take an active training role in the project? ❏ Are they recruiting ESRs? ❏ Are they training ESRs in industrial/entrepreneurship skills?

You should educate the evaluator in this section about that:

❏ Your project is offering a structured, coherent and competitive training.
❏ Industrial partners don't just play a decorative role.

1.3 Quality of the supervision

Required sub-headings	Tips
Qualifications and supervision experience of supervisors	❑ What is the experience of the supervisors? ❑ How is it certified? ❑ Have they previous experience supervising ESRs? ❑ Maybe from previous ETN projects?
Quality of the joint supervision arrangements	❑ How individual supervision of the ESRs will be done? ❑ What would be the follow-up mechanisms? ❑ How industry and academic supervisors coordinate? ❑ How corrective measures if needed will be detected and implemented? Note: It is highly recommended to mention and explain that each ESR will have a personal Career Development Plan monitored by her/his supervisors.

You should educate the evaluator in this section about that:

❑ Your project is offering best quality supervisors.
❑ Supervision will be coordinated and ESRs' progress will be closely monitored.

1.3 Quality of the supervision

Your supervision should comply with what the European Charter for Researchers refers specifically:

Supervision

❑ *Employers and/or funders should ensure that a person is clearly identified to whom Early-Stage Researchers can refer for the performance of their professional duties, and should inform the researchers accordingly.*

❑ *Such arrangements should clearly define that the proposed supervisors are sufficiently expert in supervising research, have the time, knowledge, experience, expertise and commitment to be able to offer the research trainee appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms.*

More info at

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

1.4 Quality of the proposed interaction between the participating organisations

Required sub-headings	Tips
Contribution of all participants to the research and training programme	Coherently with your WP structure: ❑ In what specifically each organization is contributing to R&D&I tasks? ❑ In what specifically each organization is contributing in training tasks? Consider local/individual/network-wide training activities.
❑ Synergies between participants	Coherently with your "project value chain": ❑ How the different organizations complement each other to achieve the innovation objectives (i.e. from research to technology development to demonstration)? ❑ How the capabilities of the partners are complementary and not overlapping? ❑ How each partner covers a concrete discipline of a multidisciplinary project? Coherently with your training programme: ❑ How the training offer from each individual organization contributes co-ordinately? ❑ How the network-wide training benefits from the capacity of each organization to make a competitive whole?
Exposure of recruited researchers to different (research) environments, and the complementarity thereof	❑ How the consortium (network) facilitates the ESRs to be exposed to different research and industrial environments? ❑ What concrete positive aspects will this exposure have for the ESRs to get a job? ❑ Is this exposure working as a coherent whole for all ESRs?

You should educate the evaluator in this section about that:

❑ All consortium organizations play an active role: no dummies.
❑ The consortium works a coherent whole that benefits equally all ESRs.

2. Impact

2.1 Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives

The Innovative Training Networks (ITN) aim to train a new generation of creative, entrepreneurial and innovative early-stage researchers, able to face <u>current and future</u> challenges and to <u>convert knowledge and ideas into products and services for economic and social benefit</u>.

Remember this??

This is the time to "sell your project".

Be concrete (i.e. offering concrete examples) on:

❑ How your project widens ESRs' job opportunities?

❑ How your project gives ESRs a set of innovative and multidisciplinary R&D&I skills?

❑ How your project enhances their entrepreneurial skills?

❑ How your project provides them with basic business and managerial skills?

❑ How your project prepares them for a future R&D&I area in high demand?

2.2 Contribution to structuring doctoral/early-stage research training at the European level and to strengthening European innovation capacity, including the potential for Contribution of the non-academic sector to the doctoral / research training (as appropriate to the implementation mode and research domain)

The Innovative Training Networks (ITN) aim to **train** a new generation of **creative, entrepreneurial and innovative early-stage researchers**, able to face <u>current and future</u> challenges and to <u>**convert knowledge and ideas into products and services for economic and social benefit**</u>.

Remember this??

This is the time to "sell your project".

Be concrete (i.e. offering concrete examples) on:

❑ How your project and network helps Europe to be a the innovation forefront?

❑ How it will strengthen Europe's industrial competitiveness?

❑ How the network and project can endure in time?

❑ How it can expand incorporating new academic and industrial organizations beyond the project duration?

A tip about Impact

When a project has impact? The onion approach

The project benefits
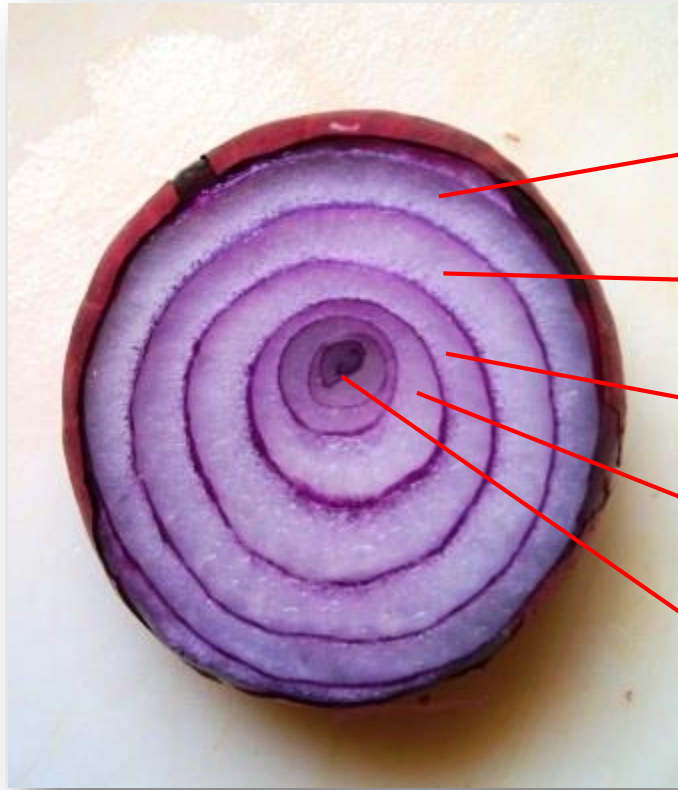
EU Society
(jobs, sustainability, wellness)

EU Competitiveness
(better industry, better businesses)

Industrial Community
(new products, new business)

Scientific Community
(new science, publications)

Consortium partners and ESRs
(new science, new businesses, new jobs, new PhDs)

Don't forget to make this
quantitative in the proposal!!

2.3 Effectiveness of the proposed measures for communication and dissemination of results

Required sub-headings	Tips
Communication and public engagement strategy of the project	Coherently with your WP structure specially WP Dissemination ❑What and how different type of audiences the project will target? Specialist communities, young researchers, industrial communities, general public, etc. ❑How the messages will be targeted and elaborated and who? ❑How the effectiveness of the communication and dissemination strategy will be measured?
Dissemination of the research results	Coherently with your WP structure specially WP Dissemination ❑How the different organizations will use their available channels for dissemination? ❑How the consortium will create new channels? ❑How and what EC channels will be used? ❑What will be the dissemination formats? Newsletter, webinar, workshop, summer school, invited scientists, European Researchers' Night, etc. ❑What concrete journal and conferences are targeted? ❑How **open access** to information should be promoted?
Exploitation of results and intellectual property	Coherently with your WP structure specially WP Exploitation ❑How the academic consortium members will exploit the project results? ❑How the industrial consortium members will exploit the project results? Be concrete if possible with projected business figures. ❑How the IP background will be identified? ❑How the ownership of the IP foreground (results) will be managed? ❑What will happen in case of conflict? How it will be managed?

2.3 Effectiveness of the proposed measures for communication and dissemination of results

You should educate the evaluator in this section about that:

❑ Your project has already envisioned a communication and dissemination strategy covering all audiences, with targeted messages and using different media.

❑ Your project has envisioned a concrete and measurable exploitation plan (both scientific and industrial) that will report benefits for:

- o The partners.
- o The ESRs.
- o European concrete technology sectors.
- o European citizens.

❑ Your project has a clear IP management implementation.

Some tips on Dissemination and Exploitation

The eternal question: DISSEMINATION vs EXPLOITATION
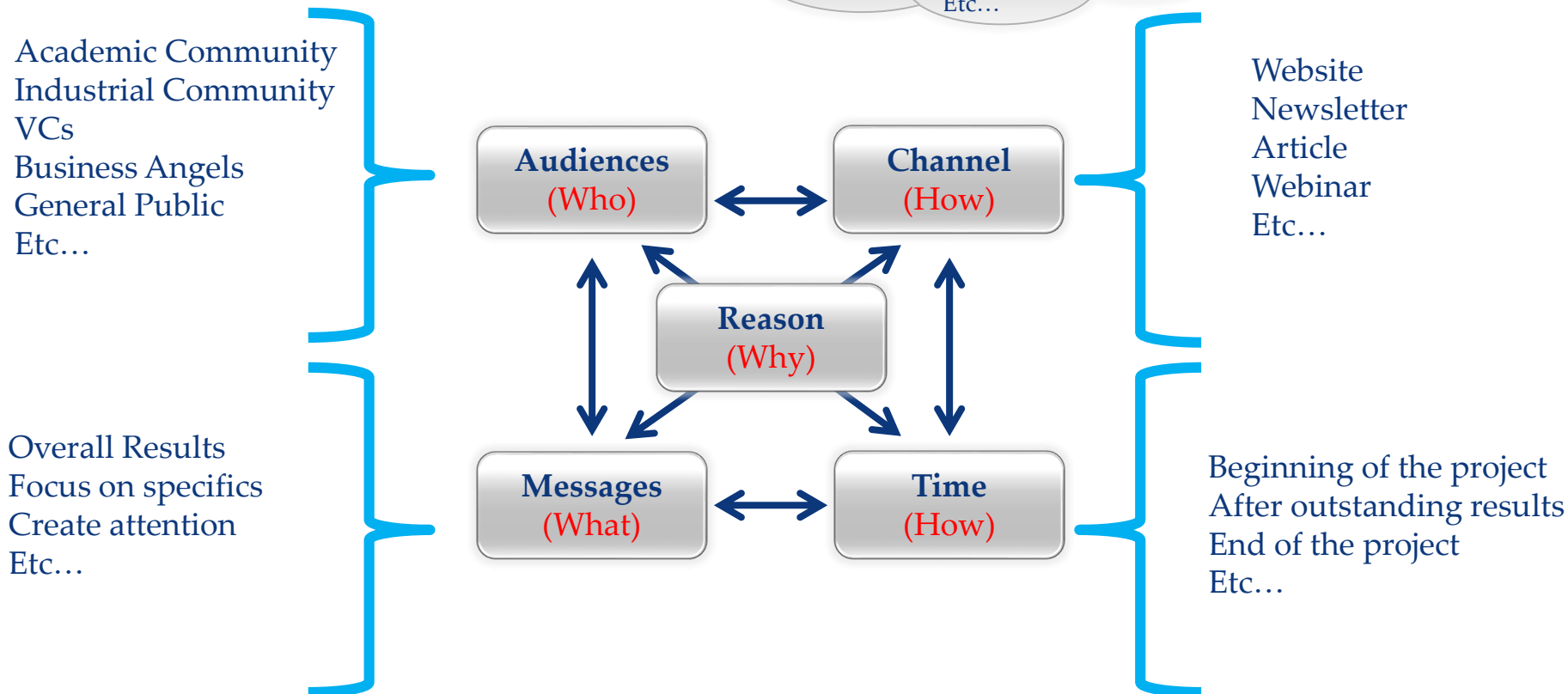
Dissemination	Exploitation
• Associated with making the results / products of a project visible to others, specially the end-users, the target groups and the key-actors that can implement its use. • Dissemination means rendering comprehensible all the activities and main results associated with a project close to all interested key actors. • Dissemination is the process of promotion and awareness raising that should occur throughout the project.	• Associated with the use of the project's results at different levels, during and after the implementation of the project. • It is related with the necessary plan and actions within it that will bring visibility to the project in order to involve the target groups, end-users, stakeholders and transfer the results/products into their professionals' scope.

Some tips on Dissemination and Exploitation

DISSEMINATION ...

WHY do I want to disseminate?
To educate the general public
To alert the scientific community
To make industry aware…
Etc…

Academic Community
Industrial Community
VCs
Business Angels
General Public
Etc…

Website
Newsletter
Article
Webinar
Etc…

Audiences (Who) ↔ **Channel (How)**

Reason (Why)

Overall Results
Focus on specifics
Create attention
Etc…

Beginning of the project
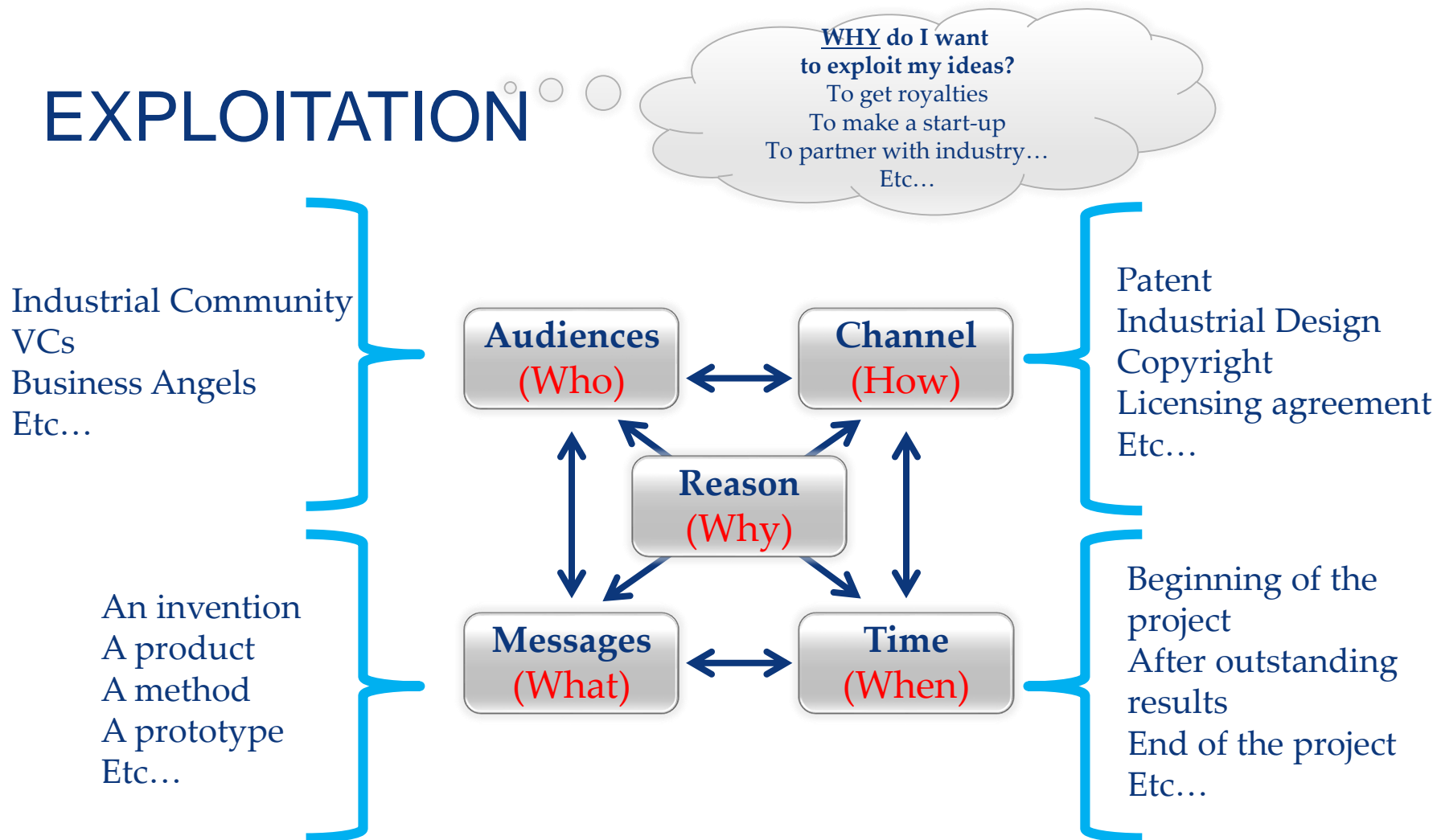After outstanding results
End of the project
Etc…

Messages (What) ↔ **Time (How)**

The why gives you the who gives you the what gives you the how gives you the when….

Some tips on Dissemination and Exploitation

EXPLOITATION

WHY do I want
to exploit my ideas?
To get royalties
To make a start-up
To partner with industry…
Etc…

Industrial Community
VCs
Business Angels
Etc…

Patent
Industrial Design
Copyright
Licensing agreement
Etc…

Audiences (Who) ↔ **Channel (How)**

Reason (Why)

Messages (What) ↔ **Time (When)**

An invention
A product
A method
A prototype
Etc…

Beginning of the project
After outstanding results
End of the project
Etc…

The why gives you the who gives you the what gives you the how gives you the when….

Pablo Tello, KT CERN

3. Implementation

3.1 Overall coherence and effectiveness of the work plan

This section is about filling the template tables so some general tips

- ❑ Work Packages, objectives, deliverables and milestones: be clear and concise with a clear identification of WP leader and tasks leaders.

- ❑ Don't just have research WPs, include of course Management, Dissemination, Exploitation, Training, Demonstration and (optionally) Public Engagement.

- ❑ ESRs individual projects: again be clear and concise in objectives and deliverables; be coherent and consistent (matching) with the deliverables defined in the WPs.

- ❑ Gantt Chart: design a project time line in which no WPs are paralysed because they depend critically on deliverables from others.

Knowledge Transfer | *Accelerating Innovation*

Pablo Tello, KT CERN

Deliverables vs. Milestones

Deliverables	Milestones
• Deliverables are distinct output of the project, meaningful in terms of the project's overall objectives. • Examples might be a report, a document, a technical diagram, a software, prototype, training event, conference, etc.	• Milestones are control points in the project that help to chart progress. • They are needed to identify when corrective measures affecting the project should be taken. • They might correlate with a critical deliverable or a critical decision point (i.e. choice between alternative developed technologies).

Don't forget that in an ETN you will need to define R&D&I as well as training, managerial, dissemination and exploitation related deliverables and milestones.
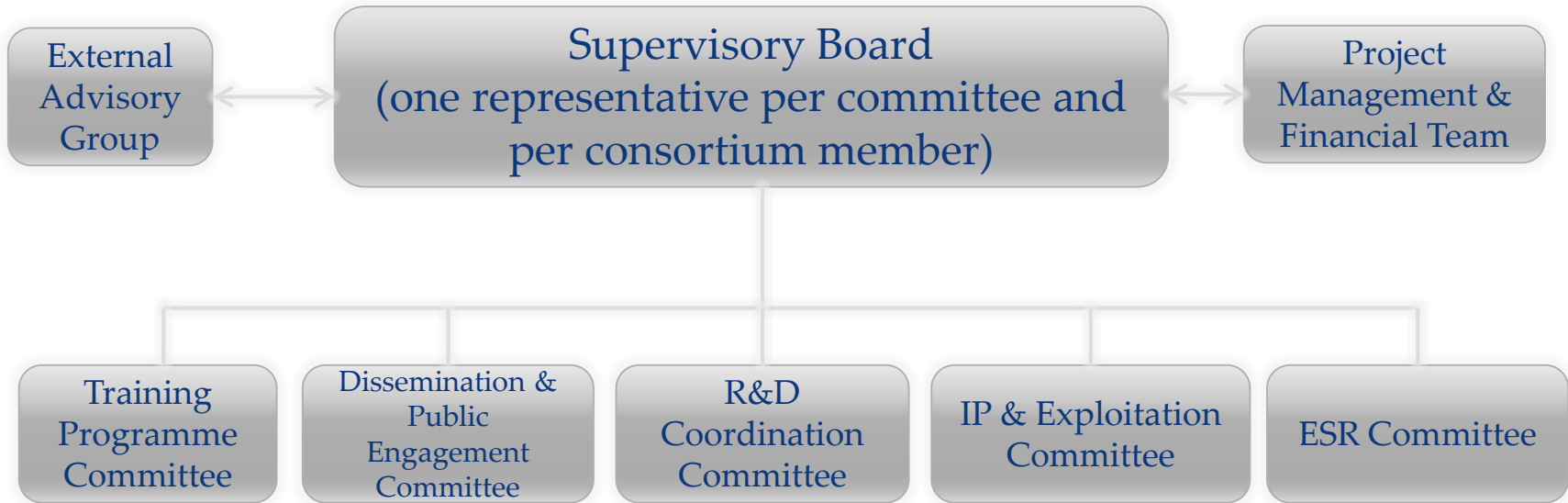
3.2 Appropriateness of the management structure and procedures, including quality management and risk management

Required sub-headings	Tips
Network organisation and management structure, including financial management strategy, strategy for dealing with scientific misconduct	See next slides
Supervisory board	See next slides
Recruitment strategy	How the recruitment strategy will be done in a transparent way? What steps will be taken? How will it be disseminated? What selection process and criteria will be taken and who? How gender aspects will be accounted for?
Progress monitoring and evaluation of individual projects	How academic and industrial supervisors will monitor ESRs' progress? What support measures will be offered for delays, etc? Will ESRs count with a tailored Career Development Plan? How their progress will be monitored when secondments take place?
Intellectual Property Rights (IPR)	How IPR will be reflected in the Consortium Agreement and Grant Agreement? How the management bodies will act in case of conflict?
Gender aspects (both at the level of recruitment and that of decision making within the project)	How the consortium is balancing gender? How the recruitment strategy will address it? How the management bodies will balance it? Will the project implement any training activity to raise gender issues awareness?
Risk management at consortium level	See next slides

3.2 Appropriateness of the management structure and procedures, including quality management and risk management

Example JUST for Inspiration: MAY NOT BE APPLICABLE TO YOUR PROJECT

A similar structure will ensure coordination and accountability of:

- Overall Project Management and contact with EC
- R&D management and monitoring
- Financial control
- Monitoring of Training
- Exploitation of results
- ESR representation
- External assessment
- Clear reporting lines and conflict resolution

3.2 Appropriateness of the management structure and procedures, including quality management and risk management

Note about the Supervisory Board

❑ Each project will have a clearly identified Supervisory Board co-ordinating the network-wide training activities.

Composition

❑ It will be composed of representatives of all beneficiaries and partner organisations and may also include any other stakeholders of relevance to the training programme, specially those from the non-academic sector (i.e. industry).
❑ Gender balance should be respected.
❑ A best practice is to include a representative from among the recruited ESRs.

Main Tasks

❑ Oversees the quality of the programme.
❑ Ensures an adequate balance between scientific/technological and transferable skills training.
❑ Establishes an active and continuous communication and exchange of best practice among the partners.
❑ Oversees the quality and quantity of supervision of the ESRs.

Note about Project Risks

❑ Use the template table.

❑ Consider Managerial, Training and R&D&I risks.

❑ Be coherent and matching with the deliverables and milestones that you have defined.

❑ Be concise and precise in the mitigation strategy proposed.

❑ Don't kill your own project with high risks.

3.2 Appropriateness of the management structure and procedures, including quality management and risk management

Note about Recruitment
(Ref. to the European Code of Conduct for the Recruitment of Researchers)
http://ec.europa.eu/euraxess/index.cfm/rights/codeOfConduct

Recruitment
Employers and/or funders should establish recruitment procedures which are:
- open, efficient and transparent,
- supportive and internationally comparable,
- tailored to the type of positions advertised.

Advertisement
- should give a broad description of knowledge and competencies required,
- should not be so specialised as to discourage suitable applicants,
- should include a description of the working conditions and entitlements, including career development prospects,
- the time allowed between the advertisement of the vacancy or the call for applications and the deadline for reply should be realistic.

Selection
- selection committees should bring together diverse expertise and competences,
- should have an adequate gender balance,
- include members from different sectors and disciplines (academic and non-academic),
- should have relevant experience to assess the candidate,
- whenever possible, a wide range of selection practices should be used, such as external expert assessment and face-to-face interviews,
- should be adequately trained.

Knowledge Transfer | *Accelerating Innovation*

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3.3 Appropriateness of the infrastructure of the participating organisations

Here it would be useful to have a table

Organization	Project tasks	Matching infrastructure/resources

Again be coherent with the WP structure and tasks that you have defined

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

Required sub-headings	Tips
Consortium composition and exploitation of partners' complementarities	❑ How the consortium covers the R&D&I and training project value chain? ❑ How the consortium commits to provide a competitive training programme to the ESRs?
Commitment of beneficiaries and partner organisations to the programme	❑ Have the consortium organizations already established collaboration links? ❑ Have they worked together previously in any EU projects? ❑ How they guarantee the success of the project?

You should educate the evaluator in this section about the fact that this consortium is fully committed to the success of the project and is capable of providing the best complementary expertise in all project aspects ("value chain").

4. Gantt Chart

❑ Simply use the provided template.

❑ Again remember: design a project time line in which no WPs are paralysed because they depend critically on deliverables from others.

5. Participating Organisations

❑ Simply use the provided template

❑ Stick to the limits of maximum one page per beneficiary and half a page per partner organisation (minimum font size: 9).

6. Ethics Issues

❑ Pay special attention if for example your project involves, medical research, data confidentiality, animal testing, possible exposition of people to hazardous environment, etc.

❑ Describe how the proposal meets the national legal and ethics requirements of the country or countries where the tasks raising ethical issues are to be carried out.

❑ Explain in detail in the ethics issues table how the consortium intends to address the issues specially regarding the research objectives, research methodology and impact of the research.

More information on "H2020 How to complete your Ethics Self-Assessment"

http://ec.europa.eu/research/participants/portal/doc/call/h2020/h2020-msca-if-2015/1645175-h2020_-_guidance_ethics_self_assess_en.pdf

7. Letters of Commitment

☐ Use this section to insert scanned copies of the required Letters of Commitment from partner organisations.

☐ Ask these letters of commitment with sufficient time since sometimes they take time to be checked internally and signed.

☐ Try to avoid generic templates and better tailor each letter accordingly and specifically with respect to the specific tasks that each organization will realize in the project.

Note about Consortium Agreement

❑ Participants in an ITN are strongly encouraged to draw up a consortium agreement setting their cooperation in the project.

❑ This agreement should cover:

- o the selection and recruitment procedures and principles,
- o IPR (management, (co)-ownership, licensing, etc)
- o supervision arrangements, including qualifications of supervisors,
- o project management, decision mechanisms,
- o etc.

Thanks for your attention

"Evolution may be a good idea, but how will we *fund it?*"