

Marie Skłodowska-Curie Actions Staff Exchanges

Submission and Evaluation

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22 November 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 and Introduction
- 2 UK Participation
- **3 Submission Process**
- **4 Evaluation Criteria and Evaluation Process**
- **5 Question and Answer**





About UKRO

We support UK based organisations involved in EU R&I

- Maximise UK participation in Horizon Europe
- A Brussels-based team of advisors
- Part of UKRI's wider International team
- UKRO Portal
 - Dedicated news articles, events and factsheets to support participation
 - Alerts to upcoming opportunities and call updates
- UK National Contact Point
 - <u>European Research Council</u>, <u>Marie Sklodowska-Curie</u>
 <u>Actions programmes</u>, <u>Widening Participation and COST</u>



Dedicated MSCA, ERC, WIDEAR and COST Resources

Sign up for NCP newsletters delivered to your inbox

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

Find out more about MSCA, ERC, WIDERA and COST funding opportunities

Contact the National Contact Points





UK's Relationship w EU

Participation on Horizon Europe



Horizon Europe Participation

UK Association

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

Included the intention of the UK to associate to Horizon Europe

Announcement on 7 September 2023, confirmed association to Horizon Europe and Copernicus programmes from 1 January 2024

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

UK entities can participate in/coordinate projects and receive funding from Horizon Europe

UKRO website provides latest information on UK participation





What Does this Mean for Staff Exchanges?

For the 2023 MSCA Staff Exchange call the EC Transition Measures Apply

At the proposal stage UK based organisations and researchers can

- Can coordinate the project (including mono-beneficiary actions)
- Can participate as send and receive staff

If successful UK beneficiaries will

- Become Associated Partners during the grant agreement preparation phase
- No longer be able to coordinate the project
- Will be funded by the <u>UK</u> government's Horizon Europe guarantee

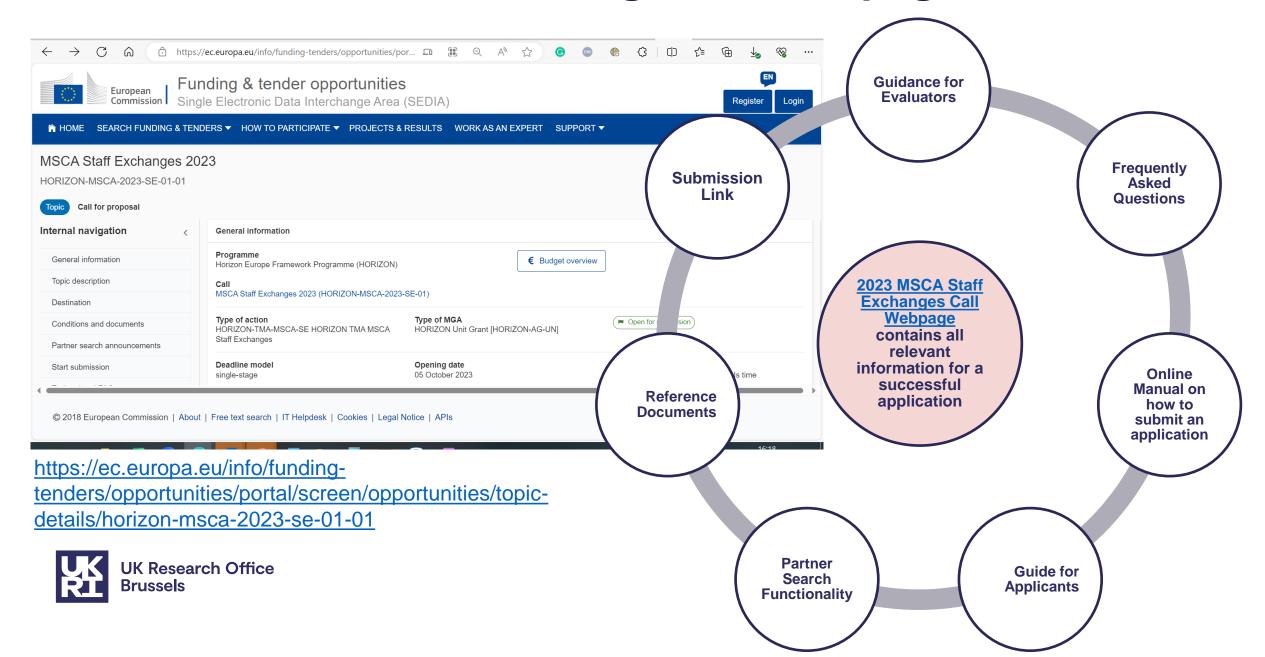




Submission of Proposals



The 2023 MSCA Staff Exchange Call Webpage



Proposal: two parts

Part A – Administrative Forms

- Filled out online in the FTOP Submission Portal
- Administrative information about the applicants

Part B - 'Standard Application Template'

- Must be downloaded from the Submission Portal; uploaded as two .pdf documents
- Technical description of the project
- Follow the standard application template (structure, formatting rules)

UK Research Office Brussels Part B1 - the prposal, max <u>32</u> pages, must be uploaded as PDF

Three sections, corresponding to the evaluation criteria

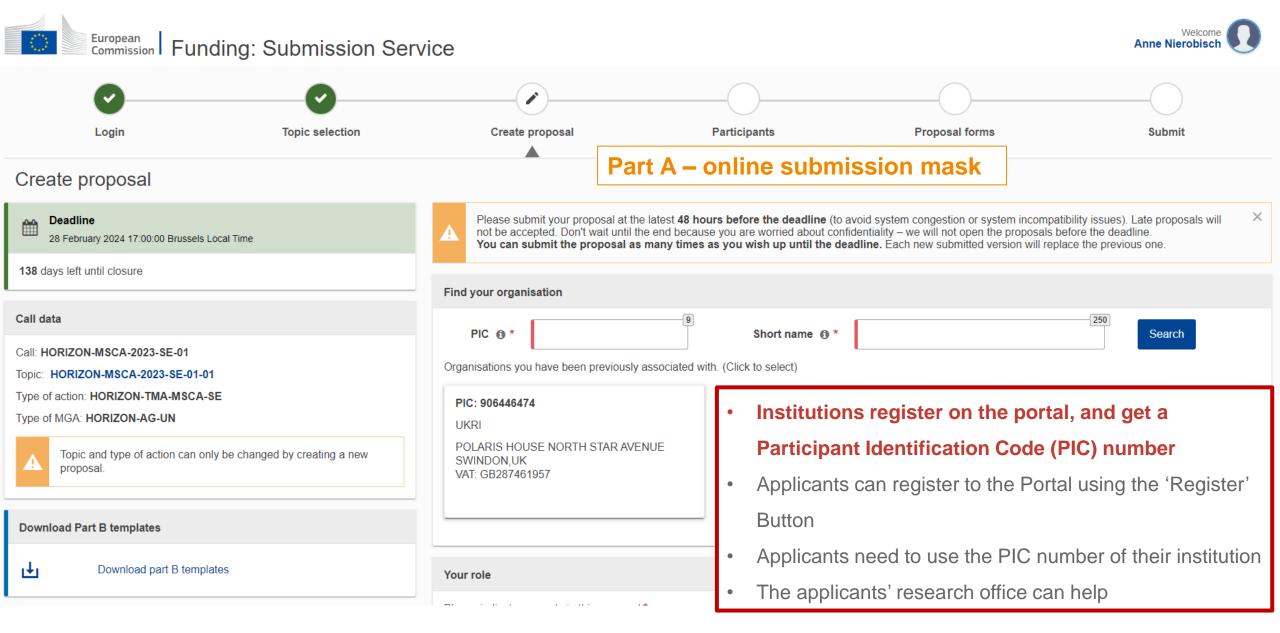
- Excellence
- Impact
- Implementation

Excess pages will be disregarded - follow the formatting rules!

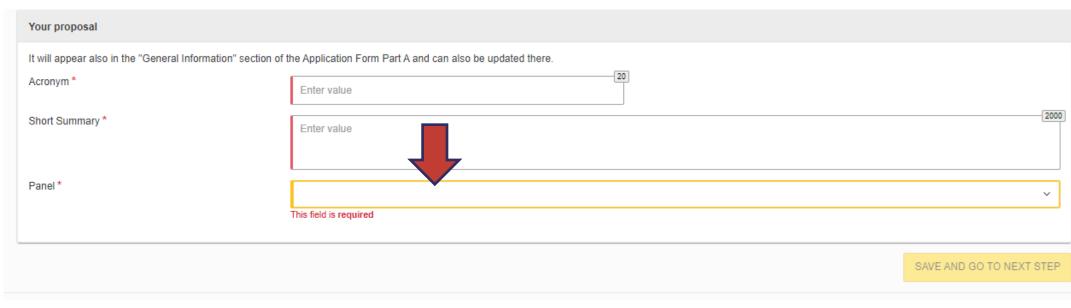
Part B2 - no page limit, must be uploaded as PDF

- Participating organisations
- Inter-relationship declaration
- Scanned Letters of Commitment (compulsory for Associated partners)

Start your application on FTOP



Choosing the Scientific Panel (Part A)

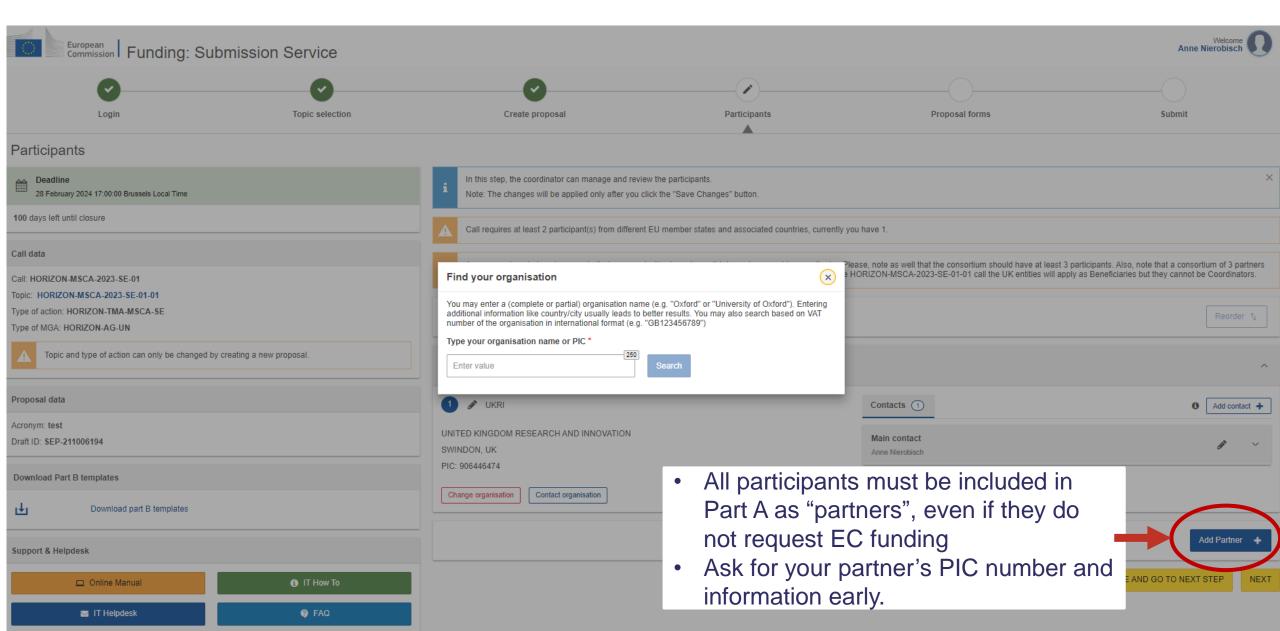


Each proposal must be submitted to only one Scientific Panel

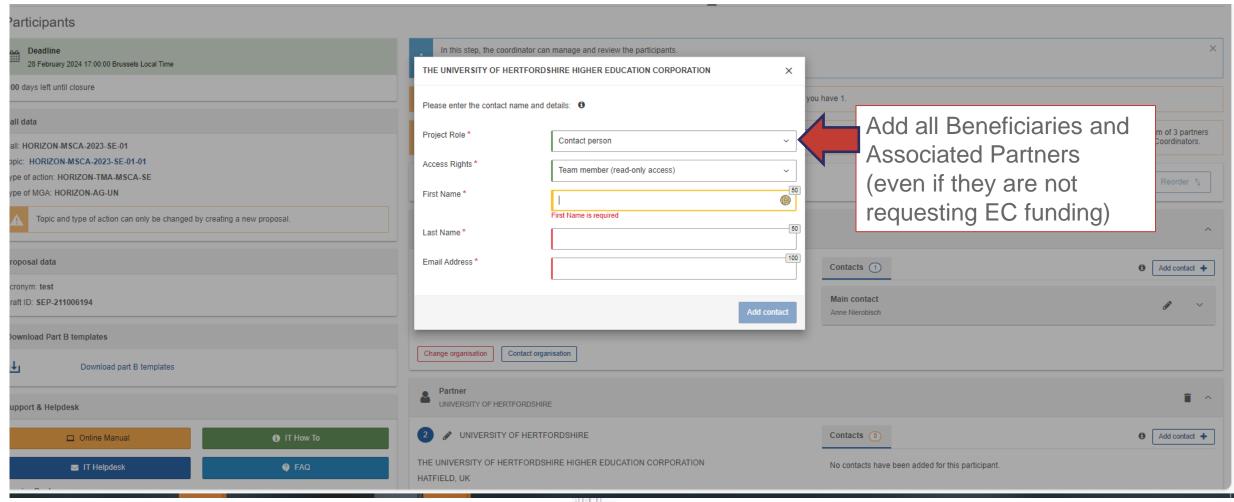
- Chemistry (CHE)
- Social Sciences and Humanities (SOC)
- Economic Sciences (ECO)
- Information Science and Engineering (ENG)
- Environment and Geo-Sciences (ENV)
- Life Sciences (LIF)
- Mathematics (MAT)
- Physics (PHY)



Filling out Part A – Adding partners

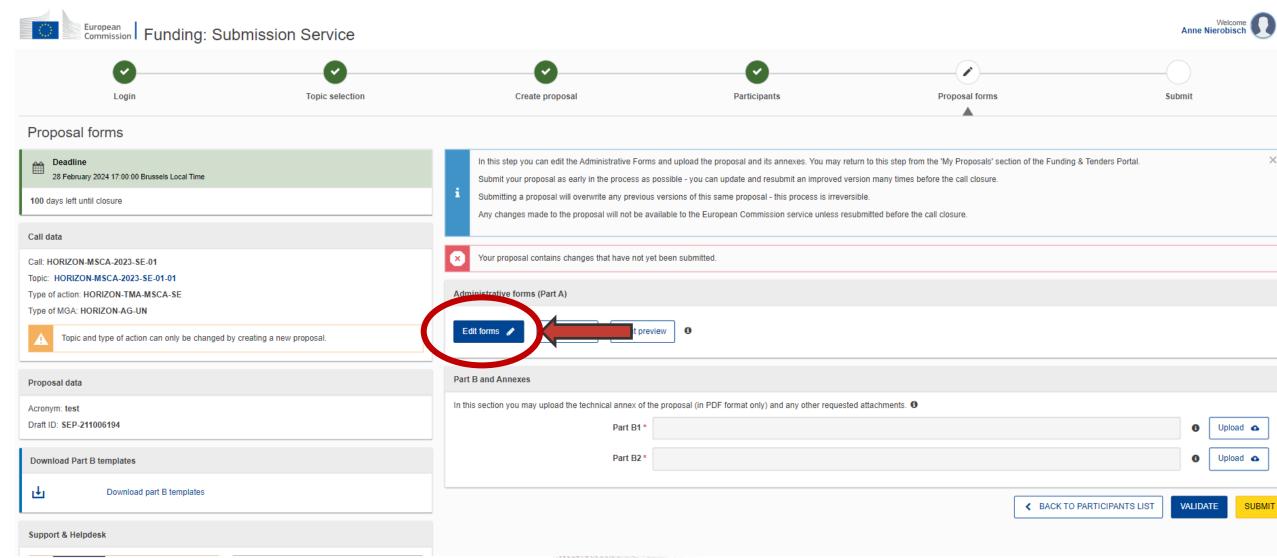


Filling out Part A – Adding partners





Filling out Part A



Filing out Part A

- ✓ Participants and contacts
- ✓ Budget based on personmonths requested
- ✓ Gender Equality plan
- Ethics and Security questionnaire



< Exit form Table of contents General Information >

ble of contents Validate form Save form Save & exit form

Call: HORIZON-MSCA-2023-SE-01

(MSCA Staff Exchanges 2023)

Topic: HORIZON-MSCA-2023-SE-01-01

Type of Action: HORIZON-TMA-MSCA-SE

(HORIZON TMA MSCA Staff Exchanges)

Proposal number: SEP-211006194

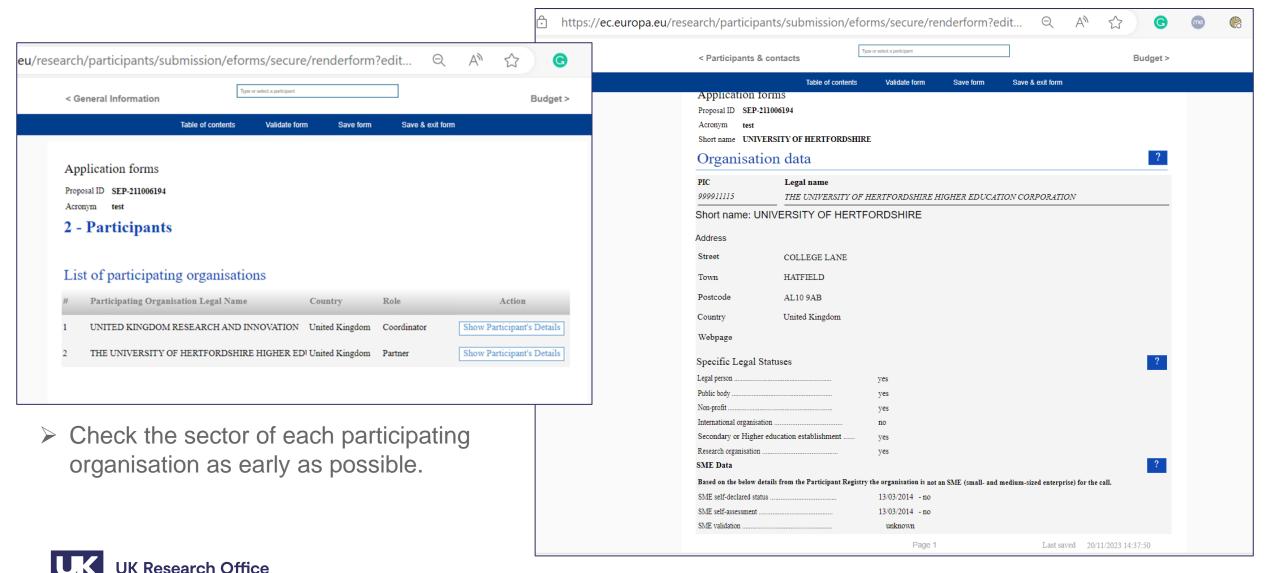
Proposal acronym: test

Type of Model Grant Agreement: HORIZON Unit Grant

Table of contents

| Section | Title | Action |
|---------|---------------------|--------|
| 1 | General information | Show |
| 2 | Participants | Show |
| 3 | Budget | Show |
| 4 | Ethics and security | Show |

Filing out Part A - Participants



Filing out Part A - Participants

| Proposal ID SEP-211006194 | | |
|-----------------------------------|---|----------------------------|
| Acronym test | | |
| Short name UKRI | | |
| | | |
| List of up to 5 publications, wi | dely-used datasets, software, goods, services, or any other achievements rele | evant to the call content. |
| Type of achievement | Short description (Max 500 characters) | Add |
| ~ | | |
| | | |
| List of up to 5 most relevant pre | vious projects or activities, connected to the subject of this proposal. | |
| | C1 | |
| Name of Project or Activity | Short description (Max 500 characters) | Add |
| Name of Project or Activity | Short description (Max 500 characters) | Add |
| Name of Project or Activity | Short description (Max 500 characters) | Add |
| | frastructure and/or any major items of technical equipment, relevant to the p | |
| | | |
| Description of any significant in | frastructure and/or any major items of technical equipment, relevant to the p | proposed work. |



▲ IMPORTANT: List of publications: In part A, neither the beneficiaries, nor the associated partners, need to fill in the list of up to five publications, relevant previous projects, or significant infrastructure. This information however will need to be described in the relevant sections of part B2.

Filing out Part A – Ethics and Security

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

- Follow Horizon Europe guidance document: 'How to complete your ethics selfassessment'
- 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)



| < Budget | | Validation result > | | | | |
|---|-----------------------|-----------------------|---------------------|------------------|-------|-----------------|
| | Table of contents | Validate form | Save form | Save & exit form | | |
| 4. Personal Data | | | | | | Page |
| Does this activity involve production | cessing of personal o | lata? | | ○ Yes | No | |
| Does this activity involve furtuse of preexisting data sets or | | | personal data (incl | uding | No | |
| Is it planned to export persona | l data from the EU t | o non-EU countries | s? | ○ Yes | No | |
| Is it planned to import personal country to another non-EU co | | countries into the E | U or from a non-l | EU Yes | No | |
| Does this activity involve the offences? | processing of person | nal data related to c | riminal conviction | or Yes | No | |
| 5. Animals | | | | | | Page |
| Does this activity involve anin | nals? | | | ○ Yes | No | |
| 6. Non-EU Countries | | | | | | Page |
| Will some of the activities be | carried out in non-EU | U countries? | | Yes | ○ No | |
| Specify the countries | | | | | | |
| United Kingdom In case non-EU countries are | involved, do the a | ctivities undertake | n in these countr | ries raise | - X | |
| potential ethics issues? | | | | O ies | No | |
| It is planned to use local resort live animals, human remains, etc.)? | | | | | No | |
| Is it planned to import any n from a non-EU country to ano | | | | he EU or O Yes | No | |
| Is it planned to export any n data exports, see section 4. | naterial (other than | data) from the EU | to non-EU count | ries? For O Yes | No | |
| HORIZON-UN-FORMSET ver 1 | .00 20230907 | Page 1 | | Last say | ved 2 | 0/11/2023 16:52 |

Filing out Part A – Budget Table

All participant organisations must be encoded only in the budget table as "Partner" except the coordinator ("Coordinator.").

Application forms

Proposal ID SEP-211006194

Acronym test

3 - Budget

They must be encoded regardless of

- whether they are beneficiaries or associated partners
- whether they request EC funding or not.

| | | | | | | No of | | Contributions for seconded researchers | Institutional contributions | | | |
|-----------------------|--------------------------------|-------------|---------|--------------------|----|----------|-------------------------|--|---|-------------------------------------|-----------|--|
| Participant number | Organisation short name | Role | Country | Academic sector | IO | seconded | Number of person months | Staff Member Unit Costs | Research, training and networking costs | Management and indirect costs | Total | |
| 1 | UKRI | Coordinator | UK | Yes | No | 4 | 36 | 82800 | 46800 | 36000 | 165600.00 | |
| | UNIVERSITY OF HERTFORDSHIRE | Partner | UK | Yes | No | 3 | 14 | 32200 | 18200 | 14000 | 64400.00 | |
| Total | | | | | | 7 | 50 | 115000 | 65000 | 50000 | 230000.00 | |





Filing out the budget table in Part A

Application forms

Proposal ID SEP-211006194

Acronym test

UKRI requests funding to second three researchers for a total of 36 months, e.g.

- 2 researchers for 24 months to an academic institution in Kenya
- 2 researcher for 8 and 4 months to non-academic institutions in Germany and France

3 - Budget

| | No of No. of | | Contributions for seconded researchers | | Institutional contributions | | | | | | | |
|-----------------------|--------------------------------|-------------|--|--------------------|-----------------------------|----------|-------------------------|-----|---|---|-------------------------------------|-----------|
| Participant number | Organisation short name | Role | Country | Academic sector | 10 | seconded | Number of person months | | Staff Member Unit Costs | Research, training and networking costs | Management and indirect costs | Total |
| 1 | UKRI | Coordinator | UK | Yes | No | 4 | 36 | | 82800 | 46800 | 36000 | 165600.00 |
| 2 | UNIVERSITY OF HERTFORDSHIRE | Partner | UK | Yes | No | 3 | 14 | | 32200 | 18200 | 14000 | 64400.00 |
| Total | | | | | | 7 | 50 | Max | ximum number of condments eligible for | 65000 | 50000 | 230000.00 |
| | funding is 360 person-months | | | | | | | | | | | |

funding is 360 person-months

Beneficiaries from EU Member States; Horizon Europe Associated Countries and Associated Partners from countries eligible for funding ("low- to middle-income countries" list) must state in the budget table:

- The number of researchers they second to an eligible country ("number of seconded researchers")
- The number of person-months requested.

Associated Partners from countries not eligible for EC funding, and not requesting exceptional funding, must encode zero (0) "number of seconded researchers" and zero (0) "number of person months".

Funding eligibility for secondments

"HOSTING" (receiving seconded staff members)



up to 1/3 of the total secondments funded by the EU can be secondments between Member States/Associated Countries within the same sector if those secondments are interdisciplinary

Guide for Applicants p.9

This symbol refers to same sector secondments up to 1/3 of the total implemented secondments funded by the EU as long as they are demonstrated to be interdisciplinary.

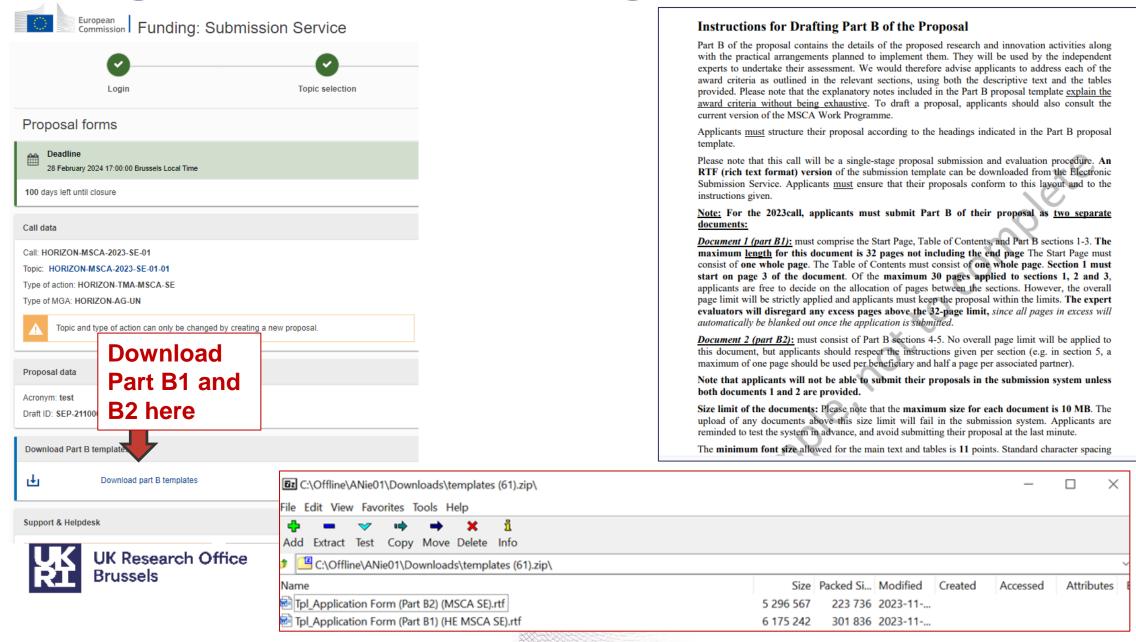
- > TC participants from low-to-middle-income countries are automatically eligible for funding
- > Secondments between entities located in the same country are NOT allowed.



List of low- to middle-income countries:

^{*} Associated Partners eligible for funding (see List of Participating Countries in Horizon Europe)

Filling out and Uploading Part B



Filling out and Uploading Part B

- Follow the guidance provided in the Standard Application Template, Part B1 and B2
- Write your proposal with the subheadings in mind
- Read the Standard Application Template as early as possible and detail how your proposal addresses the criteria

Follow the formatting rules listed in the Standard Application Template and adher to the page limit.

- Any excess pages will be removed!



- 2. Impact #@IMP-ACT-IA@#
 - 2.1. 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 level

Required sub-headings:

Part B1 - Page 9 of 19

Call: insert call identifier] - [insert call name]

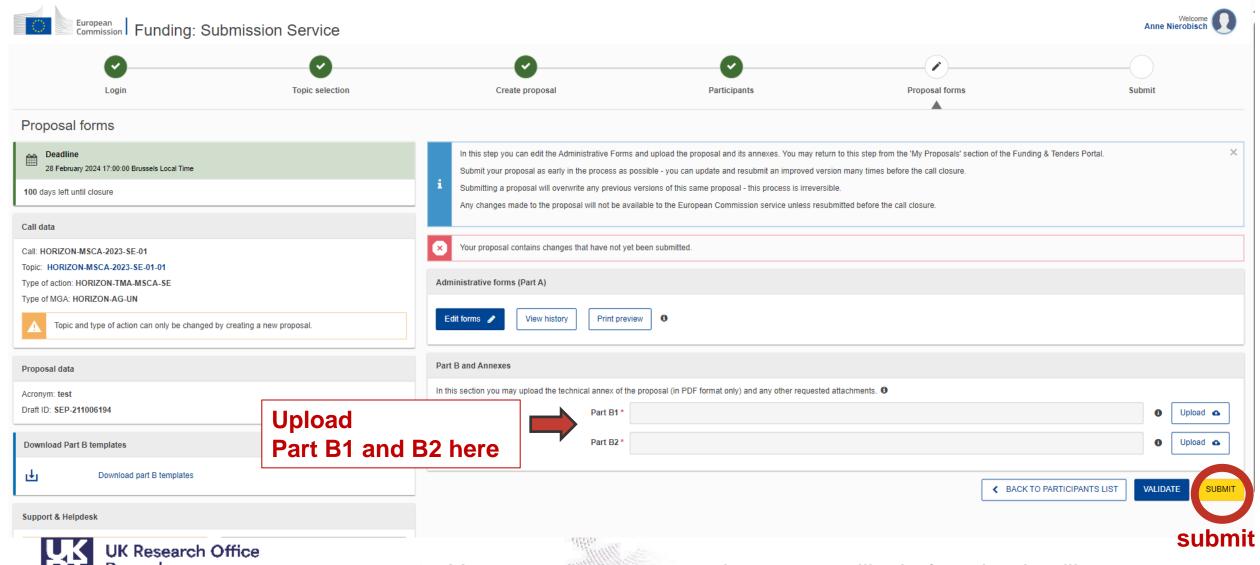
EU Grants: Application form (Part B1) (HE MSCA SE): V3.0 - 05.10.2023

- Describe the development and sustainability of new and lasting research collaborations
 resulting from international, interdisciplinary and/or inter-sectoral secondments and the
 networking activities implemented.
- <u>Describe how the project will generate knowledge transfer</u> that will benefit the participating organisations.
- Describe the contribution of the action to the improvement of the research and innovation potential within Europe and/or worldwide.
- 2.2. Credibility of the measures to enhance the career perspectives of staff members and contribution to their skills development

Required sub-headings:

- <u>Describe how the action contributes to realising the potential of individuals</u> and provides new skills, enhances their knowledge and career perspectives.
- 2.3. Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities #@COM-DIS-VIS-CDV@#

Filling out and Uploading Part B



- You can submit as many times as you like before the deadline.
- Only the final submission is counted.

Check list - including Associated Partners in the

Proposal

- ✓ Must be included as a 'Partner' in part A (even if not requesting EC funding)
- ✓ Associated Partners from countries eligible for EC funding must be included in the budget table
- ✓ Associated Partners from countries not eligible for EC funding, or not requesting exception funding, must encode zero (0) "number of seconded researchers" and zero (0) "number of person months".
 - If Associated partners not eligible for EC funding are requesting exceptional funding they must justify this in proposal Part B1 section 3.2.
- ✓ Must be fully integrated throughout ALL of part B1
- ✓ Must be included in table 7 in part B2
- Must provide a scanned letter of commitment in B2
 get the letter signed off early!



Call: insert call identifier] — [insert call name]

EU Grants: Application form (Part B2) (HE MSCA SE): V3.0 - 05.10.202

5.1. Template of Commitment letter for associated partners

| On headed paper of the associated partner organisation Beyond any additional information that the associated partner wishes to indicate in its letter of institutional commitment, the following text should appear in <u>all its parts and with no modifications</u>: |
|---|
| I undersigned ¹³ , in my quality of Legal Authorized Representative of ¹⁴ , commit to set up all necessary provisions to send/host the secondments |
| contributing to the development and implementation of the proposal number acronym submitted within the call HORIZON-MSCA-2023-SE-01 should the proposal be funded. |
| We will contribute to the [explanation of the activities performed by the associated partner organisations in order to ensure a successful implementation of the project]. |
| I am aware of and agree with the principle that the setting up of such provisions is a precondition for the proposal to be funded. |
| [Free field for any additional information that the participating organisation wishes to indicate] |
| We are pleased to provide any additional information on our commitment towards the project upon your request or the request of the European Commission. |

Template for letter of commitment in B2

,Ť.

| Associated partner organisations Legal Name | | | | |
|---|--|--|--|--|
| General Description | | | | |
| Role and Profile of key people | | | | |
| Key Research Facilities, | | | | |
| Infrastructure and Equipment | | | | |
| Do you have independent research | | | | |
| premises? | | | | |
| Previous Involvement in Research | | | | |
| and innovation actions | | | | |
| Current involvement in Research | | | | |
| and Innovation actions | | | | |
| Relevant publications and/or | | | | |
| research/innovation products | | | | |

Table 7 in part B2

What to include in the Letter of Commitment

- Must be signed by an authorised person may take time to sign.
- Must demonstrate real and active participation in the proposed network
- If letter does not follow the template or fails to give enough information on the associated partner's role and/or enough assurance on their commitment in the project may negatively impact the evaluation of the proposal under 'Implementation'
- Make sure that the content of the Letters from Associated Partners match their stated tasks in the proposal
- Letters needs to refer to the proposal (call, acronym and call identifier) as well as the commitment to implement the secondments indicated in the proposal
- If providing a financial contribution, make this clear in the Letter
- In Section 3.2 can directly reference the Letters of Commitment

Call: insert call identifier] — [insert call name]

EU Gran

EU Grants: Application form (Part B2) (HE MSCA SE): V3.0 - 05.10.2023

5.1. Template of Commitment letter for associated partners

| - On headed paper of the associated partner organisation |
|--|
| - Beyond any additional information that the associated partner wishes to indicate in its letter of institutional commitment, the following text should appear in <u>all its parts and with no modifications</u> : |
| |
| I undersigned 13, in my quality of Legal Authorized Representative of 14 |
| , commit to set up all necessary provisions to send/host the secondments |
| contributing to the development and implementation of the proposal number acronym |
| submitted within the call HORIZON-MSCA-2023-SE-01 should the proposal be funded. |
| ~ C |
| We will contribute to the [explanation of the activities performed by the associated partner organisations in order to ensure a successful implementation of the project]. |
| I am aware of and agree with the principle that the setting up of such provisions is a precondition for the proposal to be funded. |
| [Free field for any additional information that the participating organisation wishes to indicate] |
| We are pleased to provide any additional information on our commitment towards the project upon your request or the request of the European Commission. |
| |

Name, date, signature



Evaluation Criteria



Three weighted evaluation criteria
Outlined in the 2023-24 MSCA Workprogramme, p.101
Guidance for Evaluators is published on the Call Webpage.

| Excellence | Impact | Quality and efficiency of the implementation |
|--|--|--|
| research and innovation objectives (and the extent to which they are | Developing new and lasting research collaborations, achieving transfer of knowledge between participating organisations and contributing to improving research and innovation potential at the European and global level | Quality and effectiveness of the work plan, assessment of risks, and appropriateness of the effort assigned to work packages |
| Soundness of the proposed methodology (including interdisciplinary approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality and appropriateness of open science practices) | | Quality, capacity and role of each participant, including hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise |
| Quality of the proposed interaction between the participating organisations in light of the research and innovation objectives | | |
| 50% | 30% | 20% |

Evaluation Criteria

| Excellence | Impact | Quality and efficiency of the implementation | | | |
|---|---|--|--|--|--|
| Quality and pertinence of the project's research and innovation objectives (and the extent to which they are ambitious, and go beyond the state of the art) | Developing new and lasting research collaborations , achieving transfer of knowledge between participating organisations and contributing to improving research and innovation potential at the European and global level | | | | |
| Soundness of the proposed methodology (including interdisciplinary approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality and appropriateness of open science practices) | Credibility of the measures to enhance the career perspectives of staff members and contribution to their skills development | Quality, capacity and role of each participant, including hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise | | | |
| Quality of the proposed interaction between the participating organisations in light of the research and innovation objectives | Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities The magnitude and importance of the project's contribution to the | | | | |
| 50% | expected scientific, societal and economic impacts 30% | 20% | | | |



Horizon Europe Proposals must take the Gender Dimension of the Research, Open Science Practice and Scientific, Societal and Economic Impacts into account.

Excellence





1.1. Quality and pertinence of the project's research and innovation objectives (and the extent to which they are ambitious, and go beyond the state of the art)

Detail the research and innovation objectives. Are the objectives measurable and verifiable? Are they realistically achievable?

- Describe research objectives using SMART (Specific, Measurable, Attainable, Relevant and Time-Bound).
- Why is your consortium the best suited to take the research project on?

Pertinence and innovative aspects of the research programme (in light of the current state of the art and existing programmes / networks).

Describe how your project goes beyond the state-of-the-art, and the extent the proposed work is ambitious (delivering scientific breakthroughts).

- Expand on the state of the art to explain why the **research** is original, innovative and timely compared to the state of the art in the research area.
- Use footnotes to cite key relevant bibliography if applicable, make sure to cite consortium members' work and showing the high level expertise within consortium.
- Benchmark against other EU funded projects in the same/similar field but do not limit your benchmarking to EU funded consortia.
- Relation to the scope of the call why you need to work together, innovative nature (topics, consortium, synergies...)

1.1. Excellence – Evaluators' feedback

Strengths

- The project objectives are clearly formulated and extremely relevant from both theoretical and policy points of view. Concrete indicators for their measurement are properly defined.
- The research and innovation objectives are very well specified and convincing. The specific training, dissemination and collaboration objectives are also carefully prepared and detailed, which is further clarified by providing a comprehensive breakdown of each type of objective with some level of quantification.
- The theoretical framework of the project is sound and of high quality. The proposal presents a convincing state-of-the-art analysis, providing a contextual background to the research. Advancements beyond state-of-the-art have also been sufficiently developed.
- The interdisciplinary, intersectoral and multidisciplinary nature of the proposal is adequately demonstrated and necessary for achieving the scientific objectives.



Weaknesses

- The research and innovation objectives are defined only in broad terms, without going into detail about possible measurable outcomes for the individual qoals.
- The proposed goals and the related work seem **overambitious** regarding the many different methods and materials.
- The state-of-the-art is not elaborated and referred to the latest literature in sufficient detail. It is not fully clear how the proposed studies will go beyond the state-of-the-art as the specific materials and foreseen applications are not well defined.
- The innovative nature of the project has not been explained thoroughly enough as the proposed research has not been fully linked to the state of art in the field.
- The level of novelty of the proposed methodology is relatively limited.



Excellence

1.2. Soundness of the proposed methodology (including international, interdisciplinary and inter-sectoral approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality of open science practices)

- Overall methodology: Describe and explain the overall methodology including the concepts, models and assumptions that underpin your work. How will this enable you to deliver your project's objectives?
- Integration of methods and disciplines to pursue the objectives: Explain how expertise and methods from different disciplines will be brought together and integrated in pursuit of your objectives.
- **Gender dimension and other diversity aspects:** Describe how the gender dimension and other diversity aspects are taken into account in the project's research and innovation content.
- Open science practices: Describe how appropriate open science practices are implemented as an integral part of the proposed methodology. Show how the choice of practices and their implementation are adapted to the nature of your work, in a way that will increase the chances of the project delivering on its objectives.
- Research data management and management of other research output
- Artificial Intelligence (if applicable)



1.2. Excellence – Evaluators' feedback

Strengths

- The overall methodology is appropriate and very well describes the challenges to be faced. Integration of methods and disciplines to pursue the objectives is well above average.
- The project benefits from a very good methodology.
 It emphasizes the challenges which could be met during the realization of the foreseen tasks.
- The interdisciplinary and intersectoral nature of planned activities is well demonstrated: the proposed activities will bring together a comprehensive international multidisciplinary network of experts, and will be supported by a well-structured secondment programme.
- The gender dimension is well addressed in terms of the research with consideration of female preferences and requirements being considered, and also in terms of project implementation through a gender equality plan.
- Open data sharing between partners has been adequately described based on previous experiences and development of tools for dana sharing. An extensive data management plan
 UK Fesaccording to the FAIR principles is provided.

Weaknesses

- The intersectoral, international and interdisciplinary aspects of the proposed secondments between participants are not sufficiently demonstrated.
- The different methodologies to be used have not been sufficiently illustrated and, it is not sufficiently clear and specific how they can be linked to the identified scientific objectives to guarantee their achievement. The provided description does not offer sufficiently convincing evidence that all the defined objectives can be realistically achievable.
- The gender dimension of the research topic is not taken into account and a justification for this is missing from the proposal.
- Diversity issues beyond gender are not addressed.
- Open science is discussed in a short and not very detailed format. A data management plan is only superficially addressed and no dana handling according to the FAIR principles is mentioned. The concrete measures to adapt these practices to the activity are missing. For example; open access tools, reproducible research, open science evaluation and citizen science are neither adequately presented nor explained.



Excellence







1.3. Quality of the proposed interaction between the participating organisations in light of the research and innovation objectives

Contribution of each participating organisation in the activities planned, with particular emphasis on the scientific objectives described in section 1.1.

- Clearly state what each participating organisation will contribute towards achieving the research and knowledge transfer objectives
- Include their expertise, their contribution to networking events, and their level of participation in the secondment
- Justification of the main networking activities (e.g. workshops/trainings/conferences, etc.).
- Describe the networking activities that will be organised to share knowledge e.g. workshops, meetings, trainings, online networking and knowledge sharing
- Justify how these will contribute to the knowledge-sharing objectives
 explain why you have chosen these particular activities.

1.3. Excellence – Evaluators' feedback

Strengths

- A proper approach ensuring adequate knowledge sharing is well explained, pertinent, and in line with the objectives, including a description of the knowledge and expertise delivered by the participating organisations.
- Main networking activities are well described.
- The proposal demonstrates a broad interdisciplinary and inter-sectoral network for research and knowledge sharing, achieved through well balanced and well-justified secondments in terms of the MSCA - SE scheme.
- The proposal provides credible details on the expertise of each participant and how they are brought together to achieve the project's objectives.
- The contribution of each participating organization to the planned activities and suitable knowledge sharing is well balanced and of good quality.
- The benefits of the main networking activities via training, courses, and seminars are well justified by the proposal.



- The approach ensuring knowledge sharing between participants is not explained with the necessary level of detail and activities devoted to knowledge transfer are not clearly described.
- The proposal does not sufficiently demonstrate the interactions that could lead to interdisciplinarity. The potential interactions are listed generically; these do not convincingly demonstrate the integration of the current expertise and methods with the disciplines mentioned.
- The interactions between participating organisations, particularly between academic and non-academic beneficiaries, and for staff exchanges, are insufficiently elaborated. Specifically, networking activities, including the workshops and thematic schools, are not sufficiently detailed in relation to individual contributions.
- The challenges for each WP and the means to be used by the participants to address and overcome these possible challenges are not credibly identified.
- The proposed contribution of critical resources for industry and evidence-based information for policymakers is somehow overstated.
- The justification of networking activities is offered in general terms, mainly presenting the expected activities rather than their purpose.

Impact

2.1. 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 level

Describe the development and sustainability of new and lasting research collaborations resulting from international, interdisciplinary and/or inter-sectoral secondments and the networking activities implemented.

How will the secondments and networking activities and the knowledge-transfer achieved via those mechanisms help to develop a lasting collaboration between the participants?

- <u>Describe how the project will generate knowledge transfer</u> that will benefit the participating organisations.
- Describe the overall strategy for knowledge-sharing and provide an explanation about the secondment programme and networking events.
- ➤ How will the secondments contribute to the knowledge sharing objectives?
- ➤ How will knowledge be gained?
- ➤ Who is the knowledge provider and recipient?
- ➤ How will transfer of knowledge be achieved?
- ➤ How will knowledge be transferred to the sending institution?
- **Key question:** How will the participating organisations benefit from the secondments and knowledge transfer?



• <u>Describe the contribution of the action to the improvement of the research and innovation potential</u> within Europe and/or worldwide.

Show the importance of your research project in addressing a challenge/priority at a European/Global level.

Examples for policy Priorities:

- <u>European Green</u> <u>Deal</u>
- <u>UN Sustainable</u>
 <u>Development</u>
 <u>Goals</u>
 -

2.1. Impact – Evaluators' feedback

Strengths

- The proposal **credibly addresses a strategy that will support lasting research collaborations**. Existing collaborations and new opportunities for partnerships among the partners are well explained. The interaction with non-EU partners will promote research and innovation worldwide.
- The consortium brings together participants with different profiles, involving experts from different areas, which makes the project interesting for both academia and industry.
- The proposal shows a good plan of action that will result in knowledge transfer between organizations, including event details, scope and delivery plans, locations, and a Work Package shared for all partners. Academic partners will also benefit from new training course development
- The proposal clearly shows the short-term and longterm collaboration perspectives of the participants. The measures taken to sustain the long-term collaboration between participants through a sound sustainability plan are exceptionally well presented.
- The proposal has great potential to impact the research and innovation capacity at the European and global level.

- It is evident that some partners have been made to fit into the project but with a weak connection.
- The sustainability of the research collaborations beyond the duration of the proposed activities is not convincingly demonstrated. No future scientific plans are presented, and the proposal does not indicate any concrete strategies and actions expected to secure the sustainability of the newly created collaborations.
- The knowledge sharing during the secondments and the distribution of the knowledge and skills between the partners have not been sufficiently described. It is not clear how the TC partners will benefit from the knowledge transfer, as no secondments are planned to the European partners (except for one TC partner).



Impact







2.2. Credibility of the measures to enhance the career perspectives of staff members and contribution to their skills development

Describe how the action <u>contributes to realising the potential of individuals</u> and provides new skills, enhances their knowledge and career perspectives

Detail how the participation in the project will help the Staff to enhance their potential and improve their career prospects. This could include:

- New knowledge gained (e.g. research skills, transferable skills)
- Mobility to academic/non-academic sector
- Mobility to organizations outside Europe (i.e. experiencing different research environments);
- New career options, particularly outside academia
- Raising their profile through networking, research outputs and communication activities to different target groups (including the media & general public)

Link your project with the EU policies about research careers/employability, showcasing that your project is in line with EU needs, priorities and long-term goals.

2.2. Impact – Evaluators' feedback

Strengths

- The proposal clearly defines how the project will enhance the career perspectives of involved staff, considering the sector, country, and stage of the staff member, and will provide a diverse training program for the staff.
- A concrete list of skills that will improve the career perspectives of the staff members involved is appropriately described.
- The workshops and events arranged during the project will enable the researchers to widen their network and improve communication skills, which will have a positive impact on their careers.
- The potential impact of the project on the researchers' career perspective is well described. The early-stage researchers will have access to very good scientific and soft skills training. The project will enhance their employability both in the public and private sectors.

- The proposal does not clearly describe how the collaboration and training during the project will enhance the knowledge and the career perspectives of the staff members
- The new career perspectives are not appropriately addressed, without a clear indication of what new opportunities in the job market will be result from this work.



Impact







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

Plan for the dissemination and exploitation including communication activities.

- Describe the planned measures to maximise the impact of your project through dissemination, exploitation and communication.
- Measures should be:
- proportionate to the scale of the project, and should contain concrete actions, to be implemented both during and after the end of the project, e.g. standardisation activities.
- Communication activities needs to state the main messages as well as the tools and channels that will be used to reach out to each of the chosen target groups. Explain why each measure chosen is best suited to reach the target group addressed.

Where relevant, describe the measures for a plausible path to commercialise the innovations.

<u>Strategy for the management of intellectual property, foreseen protection measures,</u> such as patents, design rights, copyright, trade secrets, etc., and how these would be used to support exploitation.

- At proposal stage, think already about Intellectual Property Rights (IPR)
- If project is successful, you will need an appropriate consortium agreement to manage (amongst other things) the ownership and access to key knowledge (IPR, research data etc

2.4. The magnitude and importance of the project's contribution to the expected scientific, societal and economic impacts.

Provide a narrative explaining how the project's results are expected to make a difference in terms of impact, beyond the immediate scope and duration of the project?

- Be specific, and only provide cases where your project would make a direct, significant impact. Impacts can be:
 - (1) scientific impact(s),
 - (2) economic/technological impact(s)
 - (3) societal impact(s)

2.3. Impact – Evaluators' feedback

Strengths

- The proposal considers a wide range of mechanisms to generate the maximum possible benefits not only for all the participating organizations, academic and industrial but worldwide.
- The proposal has a detailed plan for dissemination and exploitation, which includes a wide variety of appropriate actions and communication channels. This will be used to improve the visibility of the results and maximize the impact of the project.
- The IP management plan is relevant to the objectives of the proposal and adequately considered.
- The dissemination of the scientific results through articles, conferences, workshops, and public discussions have been presented in detail, and the main events have been listed.
- The plan to exploit results is sufficiently described and relevant.

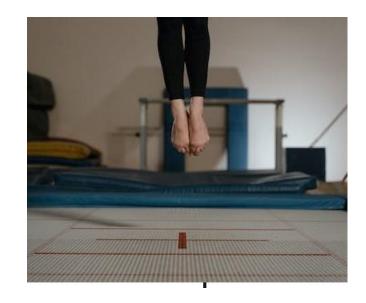


- It is described only in generic terms how the scientific results will generate an impact beyond the goals and duration of the project.
- The different stakeholder groups and specific outreach activities to them have not been adequately discussed. It is not clear how the stakeholders will find these outreach activities and how the success of these outreach activities will be monitored-
- The plan for participation in conferences and publications in scientific journals is not sufficiently detailed.
- The result exploitation plans lack a description of how the potential beneficiaries, such as SMEs and other industry sectors, will be involved in realizing the potential applications. This aspect is especially important as no intersectoral mobility is planned.
- The communication strategy is not fully convincing: the target audiences are insufficiently identified, and a structured approach, with tailored measures, to address various audiences or the timeline to reach each different audience are insufficiently developed.
- Intellectual property (IP) aspects lack convincing details. A concrete plan for managing potential IP issues within a large network, including also third countries is missing in the proposal

Implementation

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

- Complete pre-defined tables:
 - Work packages description
 - List of major deliverables
 - List of risks
- <u>Consistency and adequacy of the work plan</u> and the activities proposed to reach the action objectives (research/innovation activities, training, transfer of knowledge, etc.).
 - How are the proposed secondments necessary to implement the activities described? Is their duration appropriate to achieve the objectives?
- <u>Credibility and feasibility of the allocation of secondments proposed to</u>
 <u>reach the action objectives (research/innovation activities, training, transfer of knowledge, etc.).</u>
 - How is the number of staff available and the staff member profiles appropriate to implement the activities linked to the different secondments?





Deliverables and Work packages

Table 3: Work Package description

months of the project

| Work Package number | "X*" | Start/end month ⁶ | _/_ |
|--|--|------------------------------|-----|
| Work Package Title | (e.g. relevant title reflecting the R&I goals training transfer of knowledge activities, management, communication, dissemination, etc.) | | |
| Lead beneficiary ⁷ | | | |
| Participating organisation short name** | | | |
| Total person-months per participating organisation: | | | |

Objectives:

explain the main objectives of the Work Package (e.g. R&I, training, transfer of knowledge (through secondments, after secondments /through reintegration)

Description of work and role of specific beneficiaries/associated partners broken down and listed into numbered tasks including the following details:

Task "X.1"

- Total number of person-months allocated to secondments= " ":
- Brief description of the task in terms of relevant information concerning the specific activity/goal, the leading organisation of the task, the role(s) of the participating organisation(s), the profiles of the involved staff members, etc.

Task "X.X"

•

Description of deliverables:

- provide a brief description of the planned deliverables that is consistent with the deliverables to be listed from all Work Packages in Table 4
- i.e. consider consolidating the above listed tasks into a reasonable number of concrete outcomes (scientific and/or management, training and dissemination deliverables)

^{**}The participating organisation short name and person-months allocated to each participating organisation should be coherent with the tables in Part A of the proposal.



Due date: The schedule should indicate the **number of months elapsed from the start of the action** (Month 1)

Work package (WP)

- Major subdivision of the proposed action
- Together, all the WPs should address the overarching research goals of your project.

Deliverable

- Distinct output of the action, meaningful in terms of the action's overall objectives
- Number of deliverables in given work package must be reasonable and commensurate with the work package content and the associated secondments.
- Deliverables must be encoded in Table 3
 - Include yearly reporting as Management deliverables

Deliverables are constituted by a report, a document, a technical diagram, a software, training, conference

- e.g. a report on Publications, submission of peer-reviewed paper, development of website, project progress report, working paper outlining the initial findings

^{*}Add a table for each work package with a number

3.1. Implementation – Evaluators' feedback

Strengths

- The work packages are clearly presented in terms of objectives, tasks and deliverables and the project is credible and feasible through the proposed activities.
- The various stages in project development are appropriately represented in the proposal. There is satisfactory detail to show how each element connects to others; the sub-tasks are legitimate and connected to the objective of each of the work packages and to relevant outputs. The work plan is consistent and feasible.
- The project schedule is well detailed and guarantees that interrelationships between the WPs and partners will be carried out effectively. Also, the duration of the proposed secondments is appropriate to achieve the objectives. The work plan in terms of tasks and deliverables is very well detailed and coherent.
- The person-months allocated to each work package are sufficient and the secondments are directly related to concrete tasks.
- The project management structure, progress monitoring measures, and practical arrangements in the participating institutions are very well outlined, supporting the action's feasibility.
- The capacity of the coordinating organisation to manage an international/intersectoral consortium funded by an EU grant is convincingly demonstrated.
- Both technical and administrative risks are considered in detail, and their mitigation plan is well presented.

- The distribution of the secondments (person-months) is unbalanced with some partners assigned a high number of secondments without convincing justification.
- The role of every partner in each work package is not evident. The work packages and task leaders (persons in charge) are not clearly specified.
- Scientific deliverables are not adequately defined. Most are presented as activities with no quantitative/qualitative indicators or clearly specified means of verification.
- The supervision, support, and hosting arrangements provided to the seconded researchers have not been adequately discussed.
- The risks related to the project management or success of the secondments and/or potential delays have not been adequately considered, and the mitigation of these risks has not been explained well.

Implementation





3.2 Quality, capacity and role of each participant, including hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise

- Appropriateness of the infrastructure and capacity of each participating organisation, in light of the tasks allocated to them in the action;
- Consortium composition and exploitation of participating organisations' complementarities: explain the compatibility and coherence between the tasks attributed to each beneficiary and associated partner in the action, including in light of their experience;
- Any request for exceptional funding.
- Scanned letters of commitment for each Associated Partner must be provided in Part B2 (no page limit). The content of the letters of commitment should match the description of the tasks and capacity of Associated Partners described in this section.





3.2. Implementation – Evaluators' feedback

Strengths

- All the participants have the appropriate facilities to carry out the work and to host seconded participants.
- The number of staff available for the project is justified, and the staff member profiles have been carefully considered to support the project. The tasks assigned to participants are aligned with their relative expertise.
- The necessary infrastructures and major items of technical equipment relevant to the proposed programme are well described.
- The synergies and complementarities of participants cover all scientific and technological aspects of the proposed work
- Consortium participants have extensive experience working on EU funded projects. The expertise of all participants is compatible and very complementary, allowing the effective delivery of the project objectives.

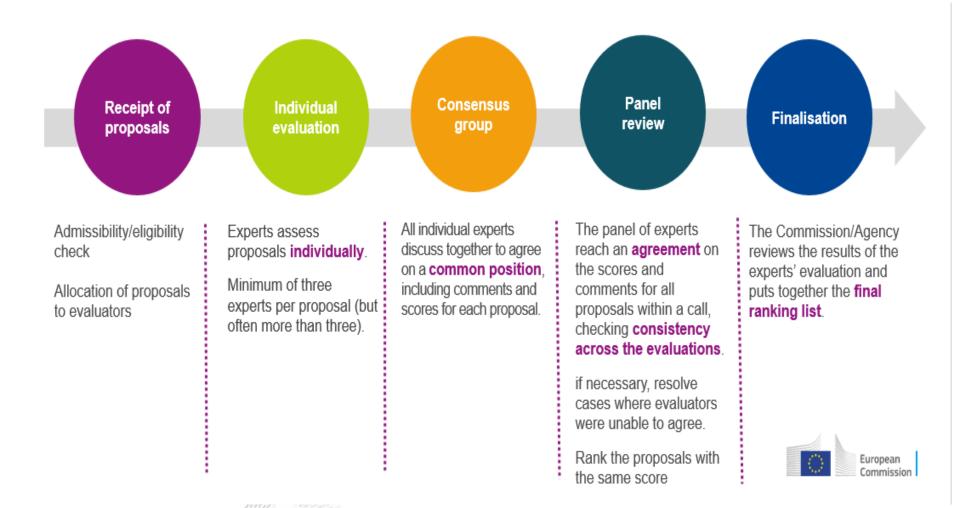
- The capacity of the consortium is not clearly described in the proposal. For example, the proposal insufficiently justifies some of the academic partners' workload balance and the proposed human resources.
- The complementarity of the different partners is not adequately detailed.
- The capacity of the coordinator to manage an EC funded project is not convincingly demonstrated.
- The appropriateness of the institutional infrastructure has been insufficiently addressed.
- The infrastructures of some nonacademic participants are only briefly described. Some necessary equipment is not fully described.
- It is not sufficiently demonstrated that the participating organisations possess a sufficient breadth of expertise to achieve all of the scientific objectives.



Evaluation

Each proposal must be submitted to only one Scientific Panel

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



- Max 5 months from submission for evaluation outcomes, and 3 months to sign the grant agreement.
- Each proposal will be evaluated in one of the eight different Scientific panels.
- Each panel will establish a ranked list of proposals for funding.
- The call budget will be distributed between the panels based on the proportion of eligible proposals received in each panel.

Ex-aequo Proposals

When the total scores of two or more proposals are equal (ex-aequo cases), the priority order will be established as follows: Firstly, proposals will be prioritised according to the scores for the criterion 'Excellence'.

When these scores are equal, priority will be based on scores for the criterion 'Impact'.

If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors such as:

- gender and other diversity aspects in the research activities,
- participation of the non-academic sector (including involvement of SMEs),
- geographical diversity
- international cooperation,
- favourable working/secondment conditions
- relationship to the Horizon Europe objectives in general.



These factors will be documented in the panel report.

Call details

MSCA Staff Exchanges 2023 (HORIZON-MSCA-2023-SE-01)

Indicative timeline

| Call opens | 5 October 2023 | |
|-----------------------------|--|--|
| Call deadline | 28 February 2024 4pm UK time (5pm Brussels time) | |
| Notification of results | June/July 2024 | |
| Earliest project start date | November 2024 | |
| Budget | EUR 78.5 million | |

Call documents (**guide for applicants, MSCA work programme** etc) and submission system available on the MSCA Staff Exchange 2023 call page

UK Research Office

Resources

MSCA Work Programme 2023-2024 https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-2-msca-actions-horizon-2023-2024-en.pdf

Marie Skłodowska-Curie Actions Website https://marie-sklodowska-curie-actions.ec.europa.eu/

Horizon Europe 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-293

MSCA-NET project https://msca-net.eu/

Standard Evaluation Form for Evaluators https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-msca-2023-se-01-01?tenders=false&callIdentifier=HORIZON-MSCA-2023-SE-01

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

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









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