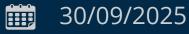


Horizon Europe: a room for Excellence



Manuela Schisani

Monopoli, XXXV International School "Francesco Romano"



Servizio Progetti - Direzione Servizi alla Ricerca





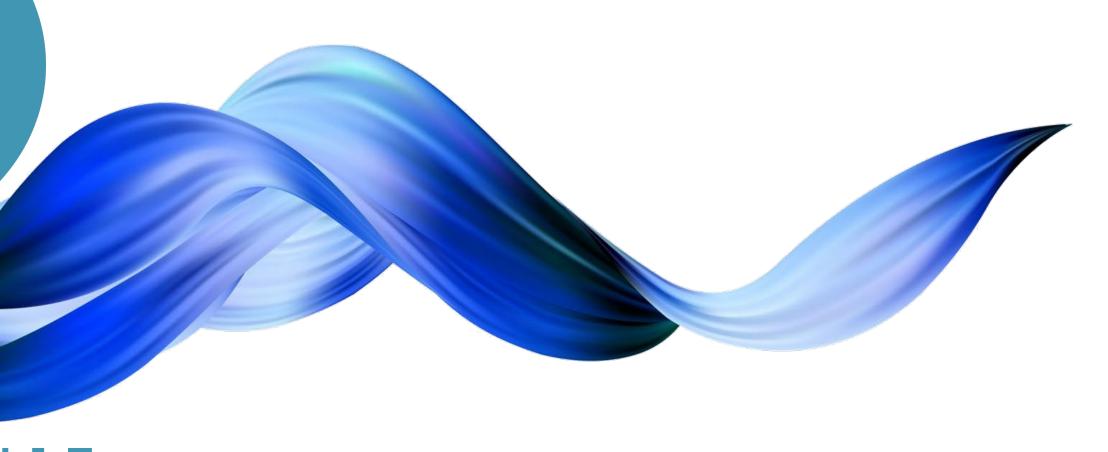
Agenda

- • EU & EU Strategies for Funding
- • Horizon Europe
- • Definitions
- • MSCA
- • ERC
- • Project Design





Introduction to European Union & European Policies









- The European Union (EU) is NOT a federation (like the United States).
- NOR is it simply an organisation for co-operation between governments (like the United Nations).
- The European Union is unique.
- The countries that make up the EU (its Member States - MS) remain <u>independent</u> sovereign nations
- They <u>delegate</u> some of their decision-making powers to shared institutions which they themselves have created, so that decisions on specific matters of joint interest can be made democratically at European level











1935 1940 1950 1945 1955

1939-1945

WORLD WAR II

Europe was in ruins after World War II. The war had destroyed cities, roads and much of Europe's industry. Europe's economy was in shambles. The war had also been devastating on a human scale: 55 million people worldwide were killed, 35 million people were injured and 190 million people had fled their homes. The cry for peace was louder than ever before.







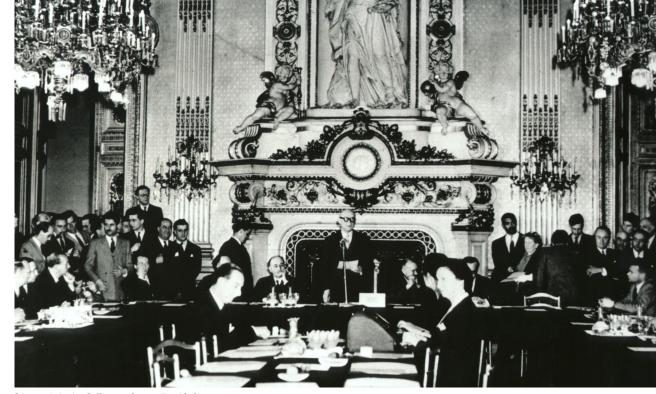


| 1970 | 1965 | 1960 | 1955 | 1950 |
|------|------|------|------|------|
| | | | | |
| | | | /5/ | |

1950: SCHUMAN DECLARATION

1950

On 9 May 1950 the French Minister of Foreign Affairs, Robert Schuman, held a press conference. He called upon other European countries to pool coal and steel resources. As coal and steel are necessary components for production, he hoped this cooperation would render future war impossible. On top of that, coal and steel were also very important in rebuilding the continent after the war.



Schuman declaration © European Communities, 1950





| 1950 | 1955 | 1960 | 1965 | 1970 |
|------|------|------|------|------|
| | | | | |

1951

1951: TREATY **ESTABLISHING** THE **EUROPEAN COAL AND STEEL COMMUNITY**

France, Germany, Italy, Belgium, the Netherlands and Luxembourg reacted positively to Robert Schuman's declaration.

These six countries signed the Treaty of Paris in 1951.

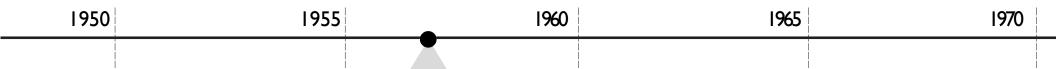
The European Coal and Steel Community (ECSC) entered into force in 1952.



© European Communities, EP







1957

1957: TREATIES OF ROME: EEC AND EURATOM TREATIES

The first six countries wanted an even stronger economic integration. Therefore they signed two new treaties in 1957: the EEC treaty and Euratom, also known as the Rome Treaties.

European Economic Community (EEC): The countries agreed to gradually turn their separate economies into a common market, starting with a customs union. This treaty marked the beginning of the cooperation in agriculture, fisheries, harbour policy and transport policy.

Euratom: This cooperation in nuclear energy aimed at joint research into the possible civilian applications of nuclear energy.

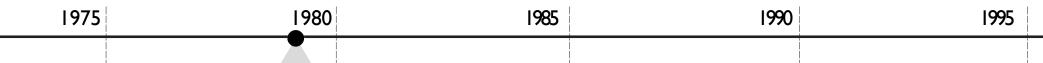
The Rome Treaties entered into force in 1958.



Signing of the Rome Treaties @ AP 1957 - Source EC Audiovisual Service







1979

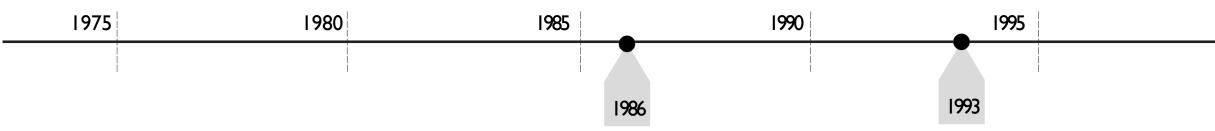
1979: FIRST DIRECT ELECTIONS FOR THE EUROPEAN PARLIAMENT

The citizens of the European Communities directly elected their representatives in the European Parliament for the first time in June 1979. At the time there were nine countries, electing 410 Members of Parliament for the period of 1979 – 1984.



Polling office in the European elections, Belgium © European Communities, 1957





1986: THE SINGLE EUROPEAN ACT

Thirty years after the countries had decided to establish a common market (the Rome Treaties), it was still not in effect. With the Single European Act the Member States decided that all obstacles to trade and free movement had to be removed (it was signed in 1986 and came into force in 1987).

1993: OPEN BORDERS

On 1 January 1993 the internal borders of the Member States of the European Union "disappeared": The Single Market with free movement of persons, goods, services and capital came into effect.







The Maastricht Treaty marked the actual beginning of cooperation on a political level, alongside the existing economic integration. A new name was given to the former European Communities: the European Union.

TREATY

The 'new' European Union consisted of three main pillars:

- 1. Economic integration: The Member States decided to enhance economic integration and to establish a common European currency: the euro.
- 2. Cooperation on foreign and security policy.
- 3. Cooperation on home/domestic affairs and justice.

This treaty was signed in 1992 and entered into force in 1993.





| 2000 | 2005 | 2010 | 2015 | 2020 | |
|------|------|------|------|------|--|
| | | | | | |
| | | | | | |

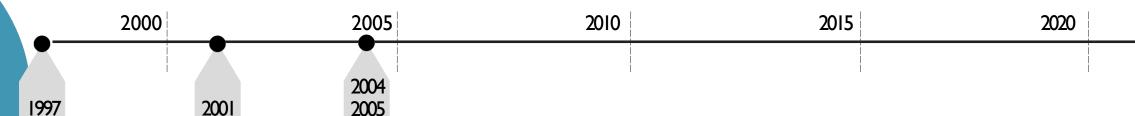
2002: INTRODUCTION OF THE EURO

2002

The euro was introduced into the banking system in 1999. But people only started using euro coins and notes on 1 January 2002.







1997: TREATY OF AMSTERDAM

With the prospect of EU enlargement towards Eastern Europe, the EU needed to be ready for a significant rise in the number of Member States. A reform of the decision-making process was needed: fewer decisions based on unanimity and more on majority voting. The first attempt to change this was with the Amsterdam Treaty (signed in 1997, into force in 1999). The treaty however did not live up to this expectation.

2001: TREATY OF NICE

With the accession date of the new countries coming closer, a second attempt to reform the European Union was made in Nice (signed in 2001, into force in 2003). It also failed to make the EU decision making easier.

2004-2005: THE EUROPEAN CONSTITUTION

A third attempt was made with the European Constitution in June 2004. Because of the importance of the European Constitution and also the fact that the word "constitution" was used, some countries decided to organise a referendum.

The population of France and the Netherlands voted against this new "Constitution for Europe".

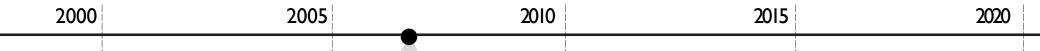
"Since every new EU Treaty has to be approved by every single Member State, the Constitution couldn't be adopted".



Posters for the referendum about the European constitution in France© European Communities, 2005







2007

2007: LISBON TREATY

The Lisbon Treaty succeeded in changing the functioning of the EU institutions. Making decisions at EU level became easier. The new rules entered into force in December 2009 and still determine how the EU functions today.

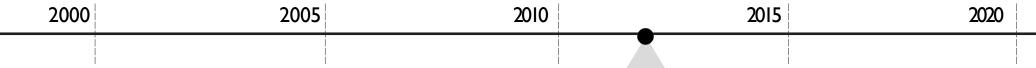


Heads of state in Lisbon, for the signing of the Treaty. © European Communities 2007





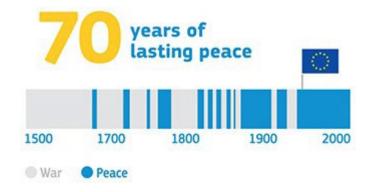




2012

2012: THE EU WINS THE NOBEL **PEACE PRIZE**

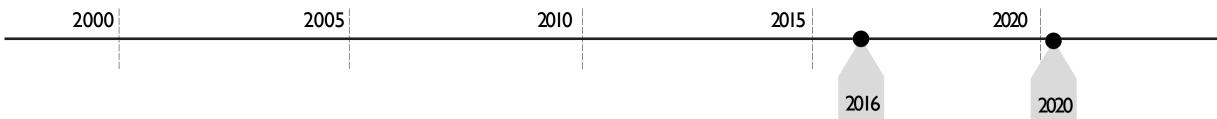
This prize was awarded to recognise European efforts towards peace, reconciliation, democracy and human rights.





© European Union, 2012





2016: UK REFERENDUM ON LEAVING THE EU

On 23 June 2016, most British citizens and some other UK residents were asked this question: 'Should the UK remain a member of the European Union or leave the European Union?' 51.9 % voted to leave and 48.1 % voted to remain, triggering negotiations on the UK's exit from the European Union and making it the first country ever to leave.

2020: THE UK OFFICIALLY WITHDRAWS FROM THE EU

The UK officially left the European Union on 31 January 2020, after three years of negotiations.

| Referendum on the United Kingdom's membership of the European Union | | | | |
|--|--|--|--|--|
| Vote only once by putting a cross in the box next to your choice | | | | |
| Should the United Kingdom remain a member of the European Union or leave the European Union? | | | | |
| Remain a member of the European Union | | | | |
| Leave the European Union | | | | |





2010 2015 2020 Future? Credits: educational tool ELROPE@90-001.-Active lessons about the European Union.

© European Parliament 2020







The European Institutions









The European Parliament

- voice of the people

Roberta Metsola, President of the European Parliament









- voice of the Member States

Antonio Costa, President of the European Council





The European Commission

- promoting the common interest

Ursula von der Leyen, President of the European Commission











The EU Institutions

European Council (summit)

3 main decision-making bodies of the EU

European Parliament

Council of Ministers (The Council)

European Commission

Court of Justice

Court of Auditors Economic and Social Committee

Committee of the Regions

European Investment Bank

Agencies

European Central Bank





The European Parliament



- Directly-elected EU body (every 5 years)
- Legislative and budgetary responsibilities along with the Council of EU
- Functions of political control and consultation
- Supervision of European Commission
- Election and approval of members of the EU Commission and Commission
 President





The European Council



- Members: Heads of state or government of EU countries, European Commission President, High Representative for Foreign Affairs & Security Policy
- Role: Defines the general political direction and priorities of the European Union



The Council of Ministers



- One minister for each EU country
- Presidency: rotates every six months
- Decides EU laws and budget together with EU Parliament
- Manages the common foreign and security policy

There are 10 Council configurations, covering the whole range of EU policies





The European Commission



- Executive organ
- Exclusive right of initiative for legislative proposals
- + Ensures the correct implementation of legislation, administers the budget and is responsible for framework and promotion programmes
- + Guardian of the treaties: monitors compliance with EU laws and brings cases of possible noncompliance before the European courts
- + Represents the EU on the international stage
- +27 independent members (Commissioners), one from each EU country



EC: Directorates-General and services

The Commission is divided into several departments and services.

The Commission services deal with more general administrative issues or have a specific mandate, for example fighting fraud or creating statistics.

The departments are known as <u>Directorates-General</u> (DGs). Each DG is classified according to the policy it deals with.

Each DG covers a specific policy area or service such as External Relations or Translation and is under the responsibility of a European Commissioner. DGs prepare proposals for their Commissioners which can then be put forward for voting in the college of Commissioners.









EC: Directorates-General

- Agriculture and Rural Development (AGRI)
- **Budget (BUDG)**
- Climate Action (CLIMA)
- Communication (COMM)
- Communications Networks, Content and Technology (CNECT)
- Competition (COMP)
- Defence Industry and Space (DEFIS)
- Economic and Financial Affairs (ECFIN)
- **Education, Youth, Sport and Culture (EAC)**
- Employment, Social Affairs and Inclusion (EMPL)
- Energy (ENER)
- **Environment (ENV)**
- European Civil Protection and Humanitarian Aid Operations (ECHO)
- European Neighbourhood and Enlargement Negotiations (NEAR)
- **Eurostat European Statistics (ESTAT)**
- Financial Stability, Financial Services and Capital Markets Union (FISMA)
- Health and Food Safety (SANTE)











EC: Directorates-General

Human Resources and Security (HR)

Informatics (DIGIT)

Internal Market, Industry, Entrepreneurship and SMEs (GROW)

International Cooperation and Development (DEVCO)

Interpretation (SCIC)

Joint Research Centre (JRC)

Justice and Consumers (JUST)

Maritime Affairs and Fisheries (MARE)

Migration and Home Affairs (HOME)

Mobility and Transport (MOVE)

Regional and Urban Policy (REGIO)

Research and Innovation (RTD)

Structural Reform Support (REFORM)

Taxation and Customs Union (TAXUD)

Trade (TRADE)

Translation (DGT)







Agencies and other EU bodies

EU agencies are **distinct bodies** from the EU institutions – separate legal entities set up to perform specific <u>technical</u>, <u>scientific or administrative tasks</u> under EU law

They are divided in 4 groups:

- **Decentralised agencies** carry out technical, scientific or managerial tasks that help the EU institutions make and implement policies
- * Executive agencies help the EU Commission to manage EU programmes
- ◆ European Atomic Energy Community Treaty (EURATOM) agencies created to coordinate national nuclear research programmes
- European Institute of Innovation and Technology (EIT): independent EU body which seeks to promote Europe's ability to develop new technologies, by pooling its best scientific, business and education resources





EU Executive Agencies

Executive Agencies are set up for a <u>limited period of time</u> by the EU Commission to manage specific tasks related to EU programmes (ex. evaluation process, signing project agreements, financial management, monitoring of projects:intermediate and final reports, communication with beneficiaries, on the spot controls)

- Education, Audiovisual and Culture Executive Agency (EACEA)
- Executive Agency for Small and Medium-sized enterprises (EASME)
- + European Research Council Executive Agency (ERCEA)
- + Consumers, Health, Agriculture and Food Executive Agency (CHAFEA)
- Research Executive Agency (REA)
- Innovation & Networks Executive Agency (INEA)



The European Commission









Clean, Just and













Maroš Šefčovič Trade and Economic Security Interinstitutional Relations and Transparency





Economy and

Productivity













Olivér Várhelyi

Animal Welfare

Health and





Climate,

Net Zero and Clean Growth

















Jessika Roswall **Environment**, Water Resilience and a Competitive Circular Economy,



Piotr Serafin Budget, Anti-Fraud and Public Administration



Energy and Housing

































European strategy 2024-2029







What is the strategic agenda?

Every five years, EU leaders agree on the EU's political priorities for the future. It is a collective effort led by the President of the European Council, where leaders discuss and decide together. It takes place in the context of the European Parliament elections and ahead of the appointment European of each Commission.











The Strategic Agenda for the Union for 2024-2029

The EU heads of state and government have agreed on the key topics which will guide the EU's work in the next years.

date: 01/07/2024

During the abovementioned European Council, the Heads of State or Government have also agreed on the Strategic Agenda for 2024-2029, which will guide the EU's work for that period. It is built on three pillars, focusing on:

- A free and democratic Europe (upholding European values within the Union, living up to EU values at global level);
- A strong and secure Europe (ensuring coherent and influential external action, strengthening the EU's security and defence and protecting its citizens, preparing for a bigger and stronger union, and pursuing a comprehensive approach to migration and border management);
- A prosperous and competitive Europe (bolstering EU competitiveness, making a success of the green and digital transitions, promoting an innovation- and business-friendly environment, and advancing together).











EU funding opportunities





Funding EU policies targets

In order to achieve the targets pursued through the EU policies, a wide range of Funding Programmes are adopted providing to different types of beneficiaries financial support in the fields related to the different EU policies.









EU Funding Programmes

Funding follows Policy

Programmes exist to achieve EU priorities

Programmes are individual

different requirements, procedures, rules, management

Don't chase the money

(...at least not only the money



align your objectives with policy





EU Funding Programmes

Two broad categories of EU funding programmes

direct funding

by EU Commission/Executive Agencies

- Direct management: Apply directly to Brussels
- + Competitive bidding process
- transnational partnerships(with some exceptions)

indirect funding

by National/Regional Authorities

- National multiannual allocation (funds from EU)
- Shared management: Apply at national/regional level

but also

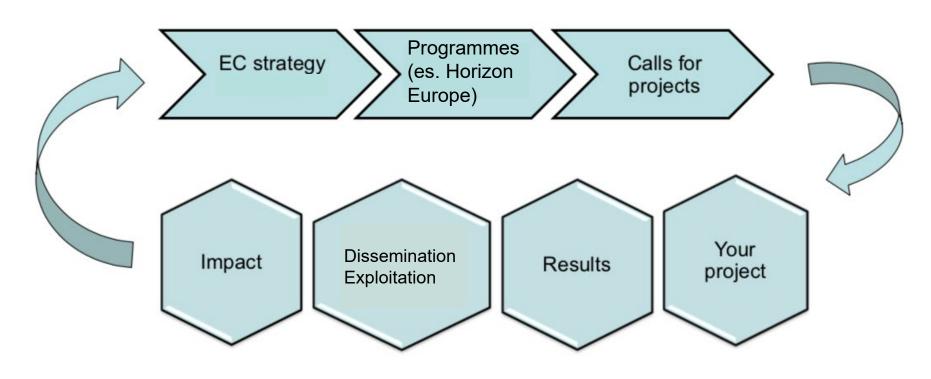
Financial Instruments (mix of EU and EIB/ local financing institutes) direction of travel = move from grants to loans, venture capital



The big picture



 $\textbf{Politician} \rightarrow \textbf{Policy} \rightarrow \textbf{Funding source} \rightarrow \textbf{Funding Programme} \rightarrow$



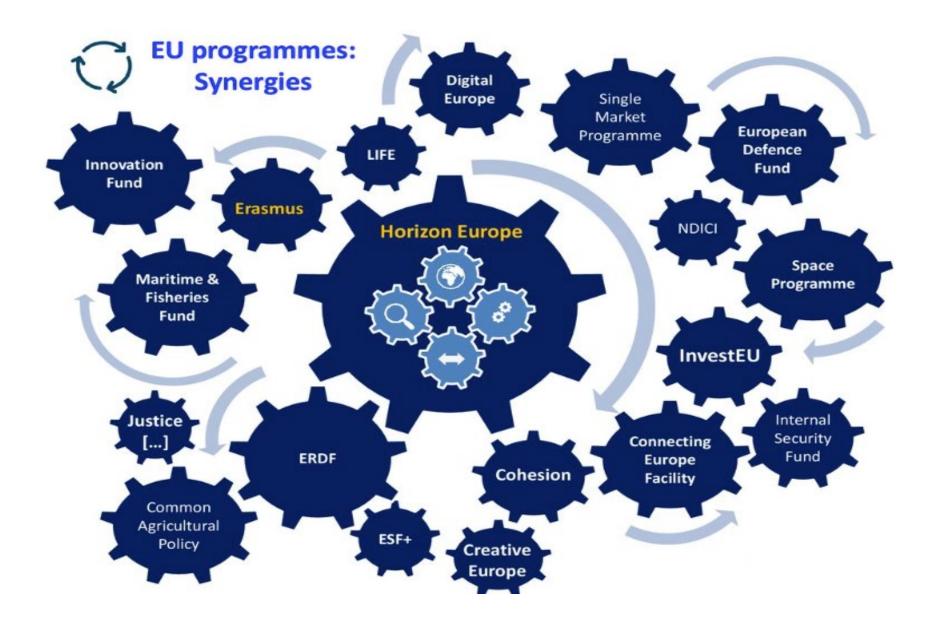
Politician ← **Impact** ← **Your project** ←



















Horizon Europe

«The Best Work Programme Ever»

The ambitious EU research and innovation framework programme (2021-2027)



to strengthen the EU's scientific and technological bases and the European Research Area (ERA)



to boost Europe's innovation capacity, competitiveness and jobs



to deliver on citizens' priorities and sustain our socioeconomic model and values







«The Best Work Programme Ever»

- The largest EU Research and Innovation programme ever for 2021-2027: € 95.5 billion (current prices)
- Structured in three main pillars to support Science and Innovation, but also to enhance access
 to excellence for researchers across Europe, to foster participation and collaboration, as well as
 promoting gender balance
- Horizon Europe will contribute to strenghten our scientific and technological base, to provide
 new knowledge and develop innovative solutions to overcome societal, ecological and
 economic challenges for healthier living, drive digital transformation and fight climate change
- Horizon Europe will foster the EU's industrial competiveness and its innovation performance,
 notably supporting market-creating innovation
- Horizon Europe helps researchers and top class innovators to develop and deploy their ideas







Basic Resarch

- and applied research create new knowledge
- studies the foundations of phoenomena
- has freedom to set the path to its objectives

"[...] without any particular application or use in view - no seeking economic or social benefits or making an active effort to apply the results to practical problems or to transfer the results to sectors responsible for their application." (OECD, Frascati Manual)









Research & Innovation

Innovation

- goes far beyond R&D
- is about responding to needs, producing tangible benefits and added value

"Innovation is the creation of something that improves the way we live our lives" -Barack Obama









Horizon Europe structure







Widening Participation and Strengthening the European Research Area

Widening participation and spreading excellence

Reforming and Enhancing the European R&I system







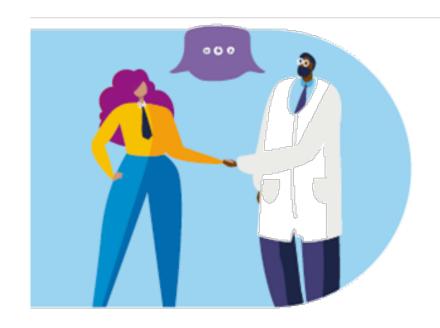












KEY ELEMENTS

- three key strategic orientations for Horizon Europe R&I activities in 2025-2027:
- 32 expected impacts distributed across clusters;
- 9 new co-programmed and co-funded European Partnerships;
- EU Missions; and gives an overview on the achievements of the first years;
- New European Bauhaus Facility

KEY STRATEGIC ORIENTATIONS















The EU is committed to preserve openness in international cooperation, while safeguarding the Union's strategic interests based on reciprocity and respect of fundamental values and principles. International cooperation takes various approaches, including further association agreements with eligible third countries, international mobility and cooperation in frontier research and EU participation and leadership in multilateral alliances.

Improving research security is key to protecting the EU's open strategic autonomy by ensuring a systematic use of the existing tools and identifying and addressing any remaining gaps. Therefore, the strategic plan highlights the existing measures under Horizon Europe that aim at safeguarding the Union's interests, autonomy and security and will be put in place where necessary to mitigate risks related to research security and technology leakage.























Horizon Europe process

Horizon Europe legislative package

Strategic Plan 2025-2027 Work Programme Calls for proposals

Horizon Europe legal framework set rules for participation:

- single set of rules
- potential participants
- relevant conditions such as time to grant, funding rates, general award and selection criteria, evaluation

and include the Specific Programme, defining the HEU implementation









Horizon Europe legislative package

Strategic Plan 2025-2027 Work Programme

Calls for proposals

Strategic Plan contains:

- Key strategic orientations for R&I support, including a description of expected impacts, cross-cluster issues and intervention areas.
- Identification of Mission and European Partnerships
- Areas for international cooperation.
- Specific cross-cutting issues









Horizon Europe legislative package

Strategic Plan 2025-2027 Work Programme

Calls for proposals

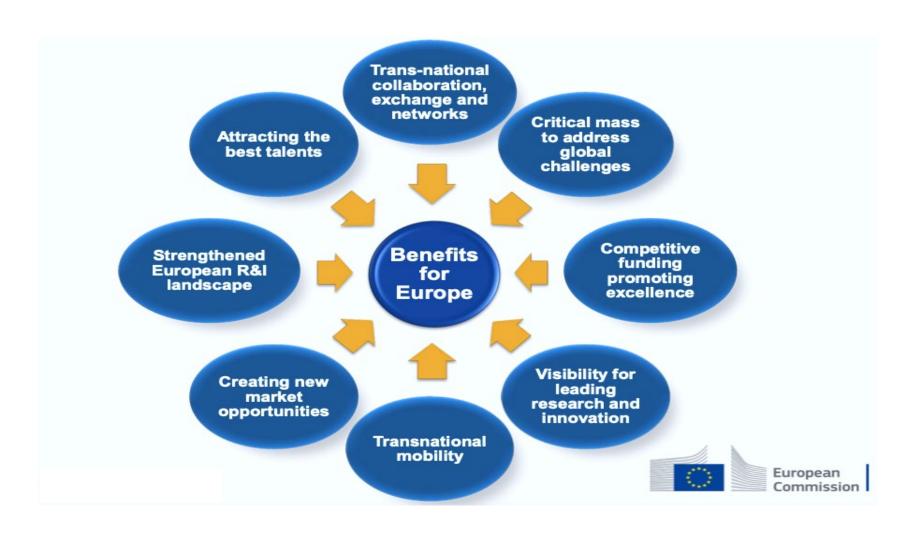
The WP, including calls, are published on a biannual basis, but with annual deadlines for call for proposals.

Minor changes to the calls in the second year of the WP may occur after the publication.





Added value through Horizon Europe









a quick look at...





- gender
- social sciences and humanities
- open science
- ethics and research integrity
- dissemination and exploitation of results
- effective circulation of knowledge between research, industry
- education and training
- balanced approach between research and innovation and key enabling technologies

They are thus issues to **be considered in all projects** to the extent that they are of relevance.









OPENSCIENCE

Better dissemination and exploitation of R&I results and support to active engagement of society

Mandatory Open Access to publications: beneficiaries shall ensure that they or the authors retain sufficient intellectual property rights to comply with open access requirements

Open Access to research data ensured: in line with the principle "as open as possible, as closed as necessary"; Mandatory Data Management Plan for FAIR (Findable, Accessible, Interoperable, Re-usable) and Open Research Data





Approaches







Collaborative VS individual

Collaborative projects

- Initiatives undertaken and performed by a group of institutions
- Enlarged teams
- Evaluation as a whole and as individuals
- Common efforts towards the objective

- Pillar I, II, III -





Collaborative VS individual

Individual projects

- Initiatives undertaken by a single researcher
- Surrounded by a limited team
- Evaluation mainly as individuals
- Common efforts towards the objective

- Pillar I -





TOP Down VS Bottom up

Top down approach

- Topics and specific objectives defined by the EC
- Limited to a single Work Programme
- Usually unreplicated

- Pillar I, II, III -





TOP Down VS Bottom up

Bottom up approach

- Topics and specific objectives proposed by the applicants
- Not limited to a single Work Programme

- Pillar I, III -







Inside Horizon Europe pillars

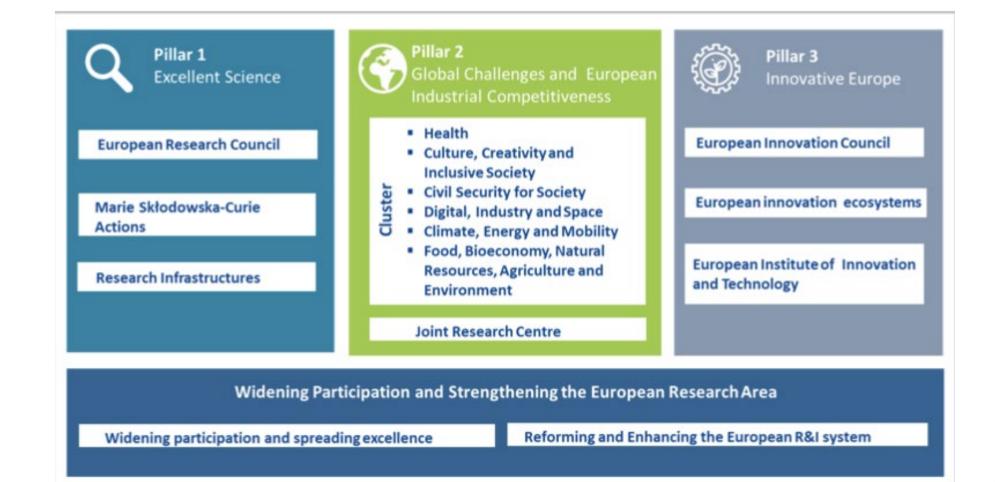








Horizon Europe structure









Pillar III: specific objectives



- ◆to foster all forms of innovation
- ◆facilitate technological development, demonstration and knowledge and technology transfer
- *Support Innovation performance, transfer and scale up
- strengthen deployment and exploitation of innovative solutions
- Mixed top down/ bottom up
- ◆Innovation-driven



Stimulating market-creating breakthroughs and ecosystems conducive to innovation







Pillar II: specific objectives



- Health
- Culture, Creativity and **Inclusive Society**

- Civil Security for Society
- Digital, Industry and Space
- Climate, Energy and Mobility
- Food, Bioeconomy, Natural Resources, Agriculture and **Environment**

Joint Research Centre

- generate knowledge
- strengthen the impact of research and innovation in developing, supporting and implementing Union policies
- support the access to and uptake of innovative solutions in European industry, notably in SMEs, and society to address global challenges, including climate change and the Sustainable Development Goals
- → top down approach
- Solution driven









Clusters in 'Global Challenges and European Industrial Competitiveness'

| Clusters | Areas of intervention | |
|--|---|--|
| Health | Health throughout the life course Non-communicable and rare diseases Tools, technologies and digital solutions for health and care, including personalised medicine | Environmental and social health determinants Infectious diseases, including poverty-related and neglected disease Health care systems |
| Culture, creativity and inclusive society | Democracy and GovernanceSocial and economic transformations | Culture, cultural heritage and creativity |
| Civil security for society | Disaster-resilient societiesProtection and Security | Cybersecurity |
| Digital, Industry and space | Manufacturing technologies Advanced materials Next generation internet Circular industries Space, including Earth Observation Emerging enabling technologies | Key digital technologies, including quantum technologies Artificial Intelligence and robotics Advanced computing and Big Data Low-carbon and clean industry Emerging enabling technologies |
| Climate, Energy and Mobility | Climate science and solutions Energy systems and grids Communities and cities Industrial competitiveness in transport Smart mobility | Energy supply Buildings and industrial facilities in energy transition Clean, safe and accessible transport and mobility Energy storage |
| Food, bioeconomy, natural resources, agriculture and environment | Environmental observation Agriculture, forestry and rural areas Circular systems Food systems | Biodiversity and natural resources Seas, oceans and inland waters Bio-based innovation systems in the EU Bioeconomy |











Pillar I: specific objectives



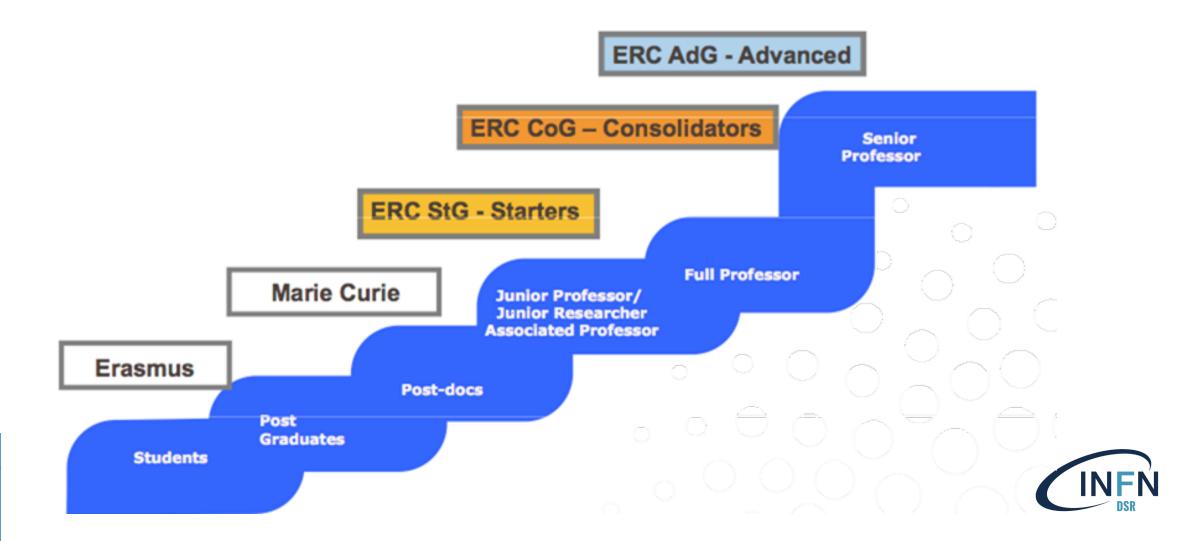
- develop. promote advance scientific and excellence
- support the creation and diffusion of high-quality new fundamental and applied knowledge, skills, technologies and solutions, training and mobility of researchers, attract talent at all levels
- contribute to full engagement of Union's talent pool in actions supported under this Programme
- bottom up approach
- ◆ Excellence-driven (Researchers, ideas, infrastructures)



Still the room for basic research



"Ideal" Research career development "with EU grants"









Towards Horizon Europe 2028-2024 (FP10)

Pillar I

EXCELLENT SCIENCE

EUROPEAN RESEARCH COUNCIL

MARIE SKŁODOWSKA-**CURIE ACTIONS**

SCIENCE FOR EU POLICIES

Pillar II

COMPETITIVENESS AND SOCIETY

COMPETITIVENESS¹:

- 1. Clean Transition and Industrial Decarbonisation
- 2. Health, Biotech, Agriculture and Bioeconomy
- 3. Digital leadership
- 4. Resilience and Security, Defence Industry and Space

SOCIETY:

- 1. Global societal challenges
- 2. EU Missions
- 3. New European Bauhaus Facility

Pillar III

INNOVATION

EUROPEAN INNOVATION COUNCIL

INNOVATION ECOSYSTEMS AND THE KNOWLEDGE TRIANGLE

Pillar IV

EUROPEAN RESEARCH AREA

ERA POLICIES

RESEARCH AND TECHNOLOGY INFRASTRUCTURES

WIDENING PARTICIPATION AND SPREADING **EXCELLENCE**



¹ Consistent with activities under the European Competitiveness Fund

Definitions











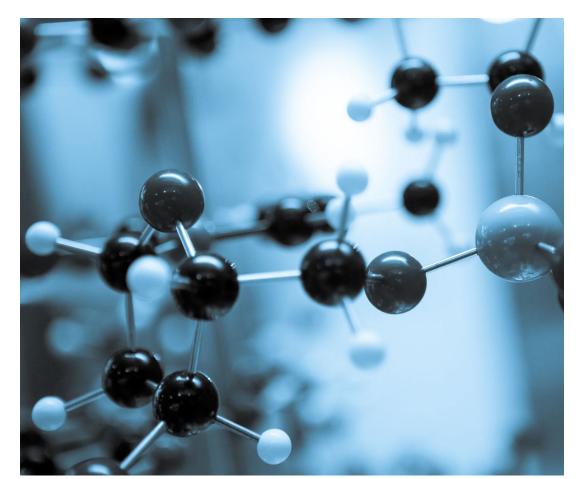












Academic sector means:

"Public higher or private **education** establishments awarding academic degrees, public or private non-profit research organisations and International European Research Organisations (IERO)."

(EuropeanCommission's definition)





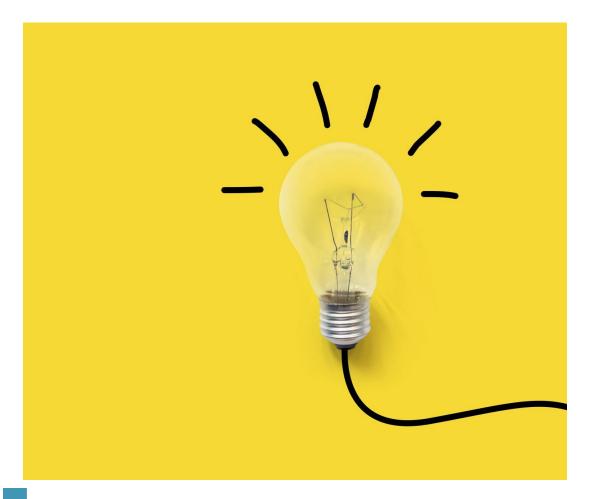












Researchers are:

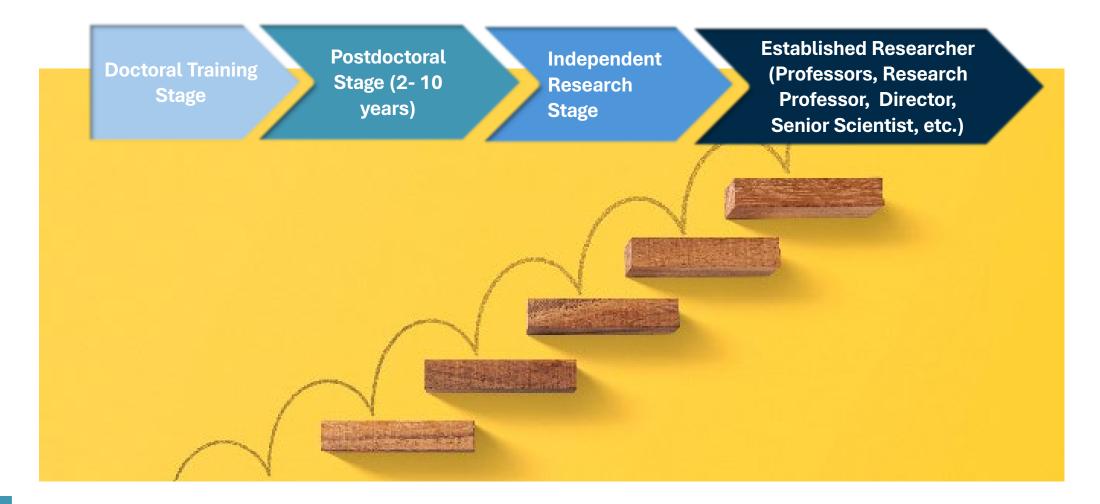
"Professionals engaged in the conception or creation of new knowledge, products, processes, methods and systems, and in the management of the projects concerned."

(European Commission's definition)





"Standard" Research Path







National career systems

Academic/research career system are regulated at national level, in terms of:

type of positions

requirements to access positions

number of positions

content of work/duties related to each position

recruitment procedures

Promotion/competition regulations and career paths

Salary level





National career systems

Common points:

Generally a doctorate is mandatory to access post-docs and higher academic/research positions

Limited positions

Limited ordinary funds

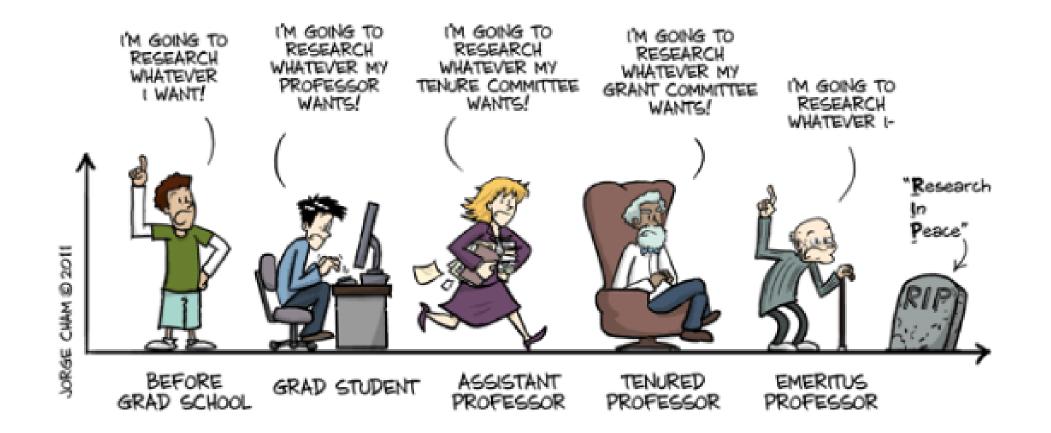








THE EVOLUTION OF INTELLECTUAL FREEDOM









The European Charter & Code for Researchers

"In order to keep the 'right' workers in the academic system, a research career has to be attractive"





The European Charter & Code for Researchers

In 2005, the European Commission adopted a European Charter for Researchers and a Code of Conduct for the Recruitment of Researchers. These two documents, addressed to researchers as well as research employers and funders in both the public and private sectors, are key elements in the EU's policy to boost researchers' careers.

1447 organisations have endorsed the Charter & Code principles









The European Charter for Researchers



The European Charter for Researchers is a set of general principles and requirements which specifies the roles, responsibilities and entitlements of researchers as well as of employers and/or funders of researchers.



It constitutes a framework for researchers, employers and funders which invites them to act responsibly and as professionals within their working environment, and to recognise each other as such.





The Code of Conduct for the Recruitment of Researchers



The Code of Conduct for the recruitment of researchers consists of a set of general principles and requirements that should be followed by employers and/or funders when appointing or recruiting researchers. These principles and requirements are complementary to those outlined in the European Charter for Researchers. Institutions and employers adhering to the Code of Conduct will openly demonstrate their commitment to act in a responsible and respectable way and to provide fair framework conditions to researchers, with a clear intention to contribute to the advancement of the European Research Area.









The Code of Conduct for the Recruitment of Researchers



aims at improving recruitment, to make selection procedures fairer and more transparent



proposes different visions of recruitment principles, selection criteria and judging merit measurement



Euraxess Portal



A unique pan-European initiative to **support researchers mobility and career developmen**t, while enhancing scientific collaboration between Europe and the world:



- coordinated by EU Commission, supported and implemented by Member States and Associated Countries
- EURAXESS Jobs: global access to vacancies and fellowships in EU - CV database for researchers
- EURAXESS Services: more than 200 services centres across EU (Visa and residence issues, social security, practical support)
- EURAXESS Links: linking researchers outside the
 EU











External funding



Allow institutions to broaden number of positions



Allow researchers to look for more possibilities



Encourage international mobility



Impact on society



Prestige for all the involved actors







MSCA & ERC





European Research Council

Established by the European Commission









Marie Sklodowska-Curie Actions (MSCA)











MSCA in Horizon Europe

Horizon Europe











MSCA

Reinforcing and extending the excellence of the Union's science base

European Research Council

Frontier research by the best researchers and their teams

€16 billion

Marie Skłodowska Curie Actions

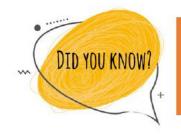
Equipping researchers with new knowledge and skills through mobility and training

€6.6 billion

Research Infrastructures

Integrated and interconnected world-class research infrastructures

€2.4 billion



12 Nobel Prize winners either backed by or involved in the Marie Skłodowska-Curie Actions between 2012 and 2020









MSCA fund mobility, training and career development for researchers. Open to all domain of research and innovation, entirely bottom-up. Attractive working and employment conditions





Research

Training

Skills

Mobility

"3i rule": international, interdisciplinary, intersectoral

Communication, dissemination, management, research career development plan, gender evaluation criteria (weighted): Excellence (50%), Impact (30%), Implementation (20%)









MSCA – KEY FEATURES



Researchers' training, skills and career development (all stages of career)



Excellent research in all domains (bottom-up approach)



International, cross-sectoral & interdisciplinary mobility



Attractive working and employment conditions



Structuring impact on organisations through excellent programmes



Strong collaboration with industry and SMEs









MSCA – KEY FEATURES

+65,000

Researchers, including 25,000 PhD candidates

37%

Researchers from outside of the EU

6.2 billion €

Under Horizon 2020

+1,000

Doctoral programmes +4,500

Companies supported

42%

Female researchers









MSCA in a nutshell

EU's reference programme for doctoral and postdoctoral training, contributing to:

- A highly skilled research-based human capital able to detect and tackle upcoming challenges, communicate scientific evidence to policy-makers and the public, and work across disciplines
- Provide researchers with skills needed in the labour market, to innovate and to convert knowledge and ideas into products and services for economic and social benefit
- Develop excellent doctoral programmes enhancing the global attractiveness and visibility of institutions involved in them
- Promote the EU's global attractiveness for talents



Budget under Horizon Europe: 6.6€ billion Worldwide geographic coverage



MSCA principles & priorities

- Contribution to the European Research Area (ERA) and European Education Area (EEA)
- Contribution to the EU external policy objectives
- Committed to the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers+ Innovative Doctoral Training Principles
- Underlying Principles: Open Science, Responsible Research & Innovation
- New publishing platform Open Research Europe, open peer review: https://open-research-europe.ec.europa.eu/





Academia – non academia collabs

- Encourage inter-sectoral exposure through incentives
- With the aim to **develop transferable skills** (e.g. innovation, entrepreneurship) leading to improved employability and career prospects within and outside academia

Incentives:

- ➤ Industrial Doctorates: max. 540 person-months instead of 360 for standard Doctoral Networks; academic and non-academic organisationsjointly supervising can be in the same country
- ➤ Postdoctoral Fellowships: additional 6 months for placements in the non-academic sector at the end of the project









Academia – non academia collabs

Academic sector

- ✓ public or private higher education establishments
- ✓ public or private nonprofit research organisations
- ✓ International European **Research Organisations**



Non-academic sector

✓ any socioeconomic actor not included in the academic sector









MSCA – actions

Doctoral Networks

Doctoral programmes in and outside academia incl. joint & industrial doctorates

Postdoctoral **Fellowships**

Support to excellent postdoctoral researchers

Staff Exchanges

Support for research and innovation staff exchanges

COFUND

Co-funding doctoral and postdoctoral programmes

MSCA and Citizens

Public outreach events (Night)







MSCA – targets





Organisation

- Any legal entity
- From academic or non-academic sector
- Beneficiary or associated partner
- Applies to Doctoral Networks, Staff Exchanges and COFUND

Individual researcher

- Any nationality
- Specific conditions (mobility rule, PhD, nationality/residence for Global PF)
- Applies to Postdoctoral Fellowships jointly with host in EU/AC





MSCA – targets

| Researchers | Actions available | |
|--|--|--|
| Researchers without a PhD degree | Doctoral Networks Staff Exchanges COFUND-DP | |
| Researchers with a PhD degree | Postdoctoral Fellowships Staff Exchanges COFUND-PP | |
| Other staff (Research managers, technicians, etc.) | Staff Exchanges | |

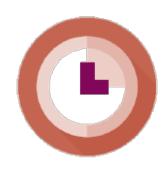








MSCA – doctoral networks



DURATION

Max 4 years (max 5 years for Joint Doctorates only)



COMPOSITION

Min 3 organisations in 3 ≠ EU MS or HE AC (at least 1 MS)



FELLOWSHIP

Between 3 and 36 months (up to 48 months for Joint Doctorates only)

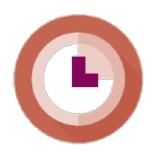








MSCA - Staff exchange



DURATION 4 years



COMPOSITION Min 3 organisations in 3 ≠ countries (min. 2 EU MS or HE AC)















One postdoctoral researcher









Supervisor

Host Institution

For European Fellowships:

Beneficiary from EU MS or HE AC

For Global Fellowships:

Beneficiary + 1 Third Country Associated
Partner







- Main Objectives: Foster excellence through implementation of research project
- Enhance the creative and innovative potential of researchers holding a PhD (training on transferable skills & career development)
- o Focus on i3(international, inter-sectoral, interdisciplinary) mobility
- Bridges and exposure to the non-academic sector
- Research areas: All scientific fields

Including Euratom areas (indicative amount EUR 1 million annually) within existing scientific panels -novelty









Postdoctoral researcher

- Have obtained a PhD at the date of the call deadline
- No age restriction
- Maximum 8 years (full-time) research experience since award of the (first) doctoral degree



Any Nationality

 Except for Global Fellowships: the researcher must be a national or long-term resident (5 years) of an EU Member States or Horizon Europe Associated Country



Mobility rule

 Must not have resided or carried out their main activity in the country of the beneficiary (for European Fellowships) or associated partner (for Global Fellowships) for more than 12 months in the 36 months immediately before the call deadline

Resubmission 🖭

Restrict resubmissions with score less than 70% to the following year







European Postdoctoral Fellowship:







Global Postdoctoral Fellowship:











Duration:

- European Fellowships: 12-24 months
- Global Fellowships: 24-36 months (incl. 12 months mandatory return phase in Europe)
- **Secondments worldwide** up to 1/3 of the fellowship duration
- Optional additional placement of up to 6 months in a non-academic European organization (novelty) at the end of the fellowship applicable to both European and Global PF







Mobility rule:

Recruited researchers must not have resided or carried out their main activity (work, studies, etc.) in the country of the beneficiary (for European Postdoctoral Fellowships), or the host organisation for the outgoing phase (for Global Postdoctoral Fellowships) for more than 12 months in the 36 months immediately before the call deadline.









| | Contributions for the recruited researcher (per Person-month) | | | | | Institutional unit contributions (per person-month) | |
|------------|---|-----------------------|--|---|---|---|--|
| | Living allowance | Mobility allowance | Family allowance (if applicable) | Long-term leave allowance (if applicable) | Special needs allowance (if applicable) | Research, training and networking contribution | Management and indirect contribution |
| MSCA DN | EUR 3,400 * country coefficient | EUR 600 | EUR 660 | EUR 4,000 x % covered by the beneficiary | requested unit x (1/number of months) | EUR 1,600 | EUR 1,200 |
| MSCA PF | EUR 5,080 * country coefficient | EUR 600 | EUR 660 | EUR 5 680 x % covered by the beneficiary | requested unit x (1/number of months) | EUR 1,000 | EUR 650 |



^{*} A country correction coefficient applies to the living allowance in order to ensure equal treatmentand purchasing power parityforallresearchers







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) | Credibility of the measures to enhance the career perspectives and employability of the researcher and contribution to his/her skills development | 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 of open science practices) | Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities | Quality and capacity of the host institutions and participating organisations, including hosting arrangements | |
| Quality of the supervision, training and of the two-way transfer of knowledge between the researcher and the host Quality and appropriateness of the researcher's professional experience, competences and skills | The magnitude and importance of the project's contribution to the expected scientific, societal and economic impacts | | |
| 50% | 30% | 20% | |





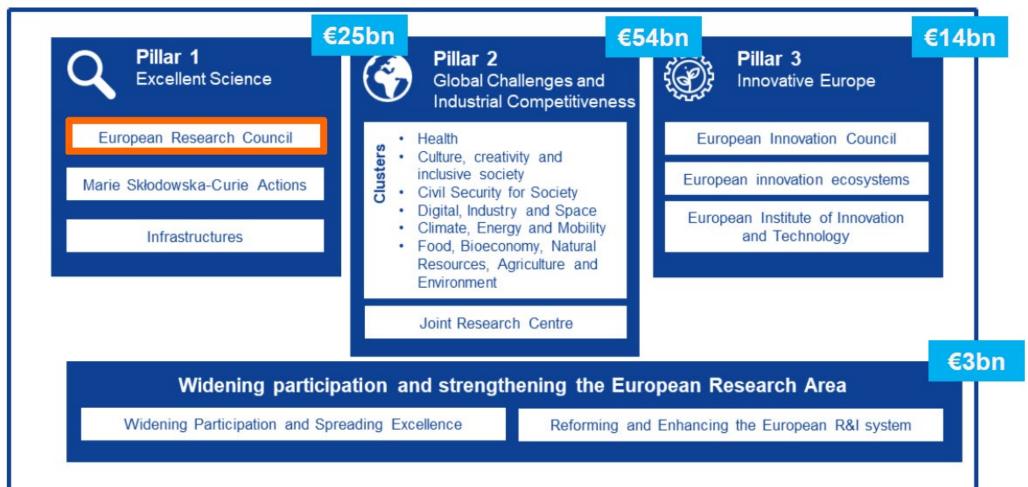
European Research Council (ERC)





ERC in Horizon Europe













ERC in Horizon Europe







17% of the entire Horizon Europe budget









ERC in figures



Over **16,000** top researchers funded since the ERC creation in 2007



Over **90,000** researchers and other professionals employed in ERC research teams



Over **2,400** patents and other IPR applications generated by ERC funding



start-ups identified as founded or co-founded by ERC grantees



Over **220,000** articles from ERC projects published in scientific journals



Over **900** research institutions hosting ERC grantees - universities, public or private research centres in the EU or **Associated Countries**



nationalities of grant holders



12 Nobel Prizes, 6 Fields Medals, 11 Wolf Prizes and other prizes awarded to ERC grantees



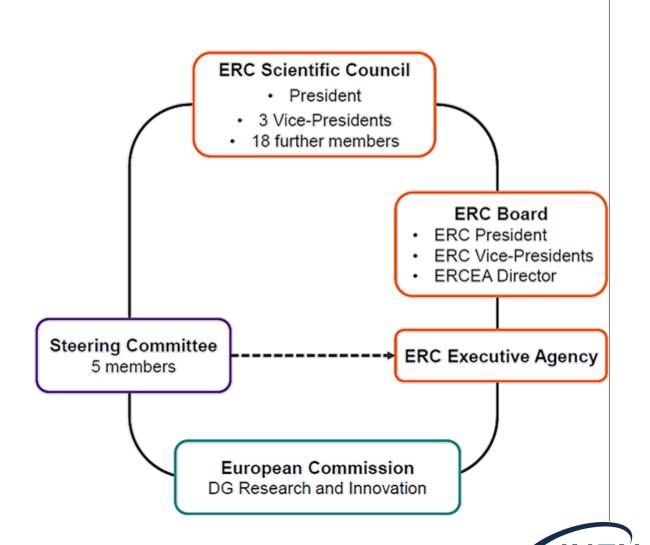




ERC governance

Scientific governance

- Independent Scientific Council with 22 members including the ERC President
- Full authority over funding strategy and evaluation
- Support by a Dedicated Implementation Structure (ERC Executive Agency)





ERC Scientific Council







Life Sciences



Geneviève Almouzni Molecular Cell Biology



Liselotte Højgaard Medicine



Leszek Kaczmarek Neurobiology.



Svejstrup Vice-President



Maria Leptin **ERC President** Cell Biology



Gerd Gigerenzer Vice-President

Social Sciences and **Humanities**



Harriet Bulkeley Geography



Mercedes García-Arenal History



Torsten Persson Economics



Giovanni Sartor Law



Milena Žic Fuchs Linguistics





Physical Sciences and Engineering



Conny Aerts Astrophysics



Tom Henzinger Computer Science



Maarit Karppinen Chemistry



Sylvie Lorente Mechnical Engineering



Björn Ottersten Electrical Engineering



Tomaž Prosen **Physics**



Nicola Spaldin



András Stipsicz Materials Theory Mathematics



ERC EXECUTIVE AGENCY (ERCEA)

The ERC Dedicated Implementation Structure - ERC Executive Agency

- Executes annual work programme as established by the Scientific Council
- Implements calls for proposals and provides information and support to applicants
- Organises peer review evaluation
- Establishes and manages grant agreements
- Administers scientific and financial aspects and follow-up of grant agreements
- Carries out communications activities and ensures information dissemination
 - to ERC stakeholders







The **European Research Council** is the first pan-European funding body designed to:

• "By challenging Europe's brightest minds, the ERC expects that its grants will help to bring about new and unpredictable scientific and technological discoveries - the kind that can form the basis of new industries, markets, and broader social innovations of the future. "

• "...encourage the highest quality research in Europe through competitive funding and to support investigatordriven frontier research across all fields, on the basis of scientific excellence. The ERC complements other funding activities in Europe such as those of the national research funding agencies..."







Established by the EU in 2007 "to reinforce excellence, dynamism and creativity in

European research", ERC supports excellence in frontier research through a bottom-up,

individual-based, pan-European competition.

Budget

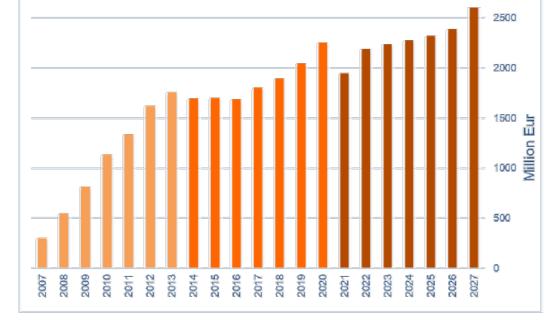
€ 16 billion (2021-2027) – 2.3 billion €/year € 13 billion (2014-2020) - 1.9 billion €/year € 7.5 billion (2007-2013) - 1.1 billion €/year

Scientific freedom

- Scientific excellence as the sole criterion
- Support to the individual scientist no consortia!
- No predetermined subjects "bottom-up"

Support for frontier research in all fields of science and humanities

International peer-review







ERC supports **Scientific Excellence**

Principal Investigator

- The best and more creative scientists;
- Established and next-generation of independent top research leaders in EU;
- Investigator driven frontier research (individual grants);
- Principal Investigators from anywhere in the world can apply;
- Portability

Proposal

- Explore new opportunities and directions, advances at the frontiers of knowledge;
- Clear and inspirational target for frontier research in any field;
- Bottom-up, ground-breaking,
 ambitious and high risk? projects









ERC principles

- Work on a research topic of your **own choice**, with a team of your own choice.
- Gain true financial autonomy for 5 years.
- Negotiate the best conditions with the Host Institution.
- Attract top team members and collaborators.

(Team members can be funded outside EU/AC if justified and supported by the panel)

- Move with the grant to any place in Europe (portability)
- Attract additional funding.









International Peer review evaluation: 28 Panels, 3 Domains:

- Physical Sciences and Engineering (PE)
- Life Sciences (LS)
- Social Sciences and Humanities (SH)

"An **ERC panel** consists of a chairperson and between 11 and 17 members. The Panel Chair and the Panel Members are selected by the ERC Scientific Council on the basis of their scientific reputation and following the criteria set up by the ERC Scientific Council Standing Committee on Panels."

Budget allocation:

"The ERC WP establishes that an indicative budget is allocated to each panel in proportion to the budgetary demand of its assigned proposals. The budget is calculated on the basis of the cumulative grant request of all proposals to the panel as a proportion of the cumulative grant request in response to the indicative budget of the call."









Evaluation panel structure

Life Sciences

- LS1 Molecules of Life: Biological Mechanisms, Structures and Functions
- LS2 Integrative Biology: From Genes and Genomes to Systems
- LS3 Cell Biology, Development, Stem Cells and Regeneration
- LS4 Physiology in Health, Disease and Ageing
- LS5 Neuroscience and Disorders of the Nervous System
- LS6 Immunity, Infection and Immunotherapy
- LS7 Prevention, Diagnosis and Treatment of Human Diseases
- LS8 Environmental Biology, Ecology and Evolution
- LS9 Biotechnology and Biosystems Engineering

Physical Sciences & Engineering

- PE1 Mathematics
- PE2 Fundamental Constituents of Matter
- PE3 Condensed Matter Physics
- PE4 Physical and Analytical Chemical Sciences
- PE5 Synthetic Chemistry and Materials
- PE6 Computer Science and Informatics
- PE7 Systems and Communication Engineering
- PE8 Products and Processes Engineering
- PE9 Universe Sciences
- PE10 Earth System Science
- PE11 Materials Engineering

Social Sciences and Humanities

- SH1 Individuals, Markets and Organisations
- SH2 Institutions, Governance and Legal Systems
- SH3 The Social World and Its Interactions
- SH4 The Human Mind and Its Complexity
- SH5 Texts and Concepts
- SH6 The Study of the Human Past
- SH7 Human Mobility, Environment, and Space
- SH8 Studies of Cultures and Arts (new in WP 2024)



PE2 - Descriptors







PE2 Fundamental Constituents of Matter

Particle, nuclear, plasma, atomic, molecular, gas, and optical physics

- PE2_1 Theory of fundamental interactions
- PE2_2 Phenomenology of fundamental interactions
- PE2_3 Experimental particle physics with accelerators
- PE2_4 Experimental particle physics without accelerators
- PE2_5 Classical and quantum physics of gravitational interactions
- PE2_6 Nuclear, hadron and heavy ion physics
- PE2_7 Nuclear and particle astrophysics
- PE2_8 Gas and plasma physics
- PE2 9 Electromagnetism
- PE2_10 Atomic, molecular physics
- PE2 11 Ultra-cold atoms and molecules
- PE2_12 Optics, non-linear optics and nano-optics
- PE2_13 Quantum optics and quantum information
- PE2_14 Lasers, ultra-short lasers and laser physics
- PE2 15 Thermodynamics
- PE2_16 Non-linear physics
- PE2_17 Metrology and measurement
- PE2_18 Equilibrium and non-equilibrium statistical mechanics: steady states and dynamics



PE9 - Descriptors







PE9 Universe Sciences

Astro-physics/-chemistry/-biology; solar system; planetary systems; stellar, galactic and extragalactic astronomy; cosmology; space sciences; astronomical instrumentation and data

- PE9_1 Solar physics the Sun and the heliosphere
- PE9_2 Solar system science
- PE9_3 Exoplanetary science, formation and characterization of extrasolar planets
- PE9_4 Astrobiology
- PE9_5 Interstellar medium and star formation
- PE9_6 Stars stellar physics, stellar systems
- PE9_7 The Milky Way
- PE9_8 Galaxies formation, evolution, clusters
- PE9_9 Cosmology and large-scale structure, dark matter, dark energy
- PE9_10 Relativistic astrophysics and compact objects
- PE9_11 Gravitational wave astronomy
- PE9_12 High-energy and particle astronomy
- PE9_13 Astronomical instrumentation and data, e.g. telescopes, detectors, techniques, archives, analyses



ERC grant schemes



Starting Grants

starters (2-7 years after PhD) up to € 1.5 Mio for 5 years



Advanced Grants

track-record of significant research achievements in the last 10 years up to € 2.5 Mio for 5 years





Consolidator Grants

Consolidators (7-12 years after PhD) up to € 2 Mio for 5 years



Synergy Grants

2 – 4 Principal Investigators up to € 10.0 Mio for 6
years
1 PI can be based outside EU/Associated
Countries

Proof-of-Concept

bridging gap between research - earliest stage of marketable innovation lump sum €150,000 for ERC grant holders

ERC 2026







| | Starting Grant | Consolidator | Advanced Grant | Synergy Grant |
|--|---------------------|----------------------|---------------------|--------------------|
| | Call | Grant Call | Call | Call |
| Identifier | ERC-2026-StG | ERC-2026-CoG | ERC-2026-AdG | ERC-2026-SyG |
| Opening Date | 9 July 2025 | 25 September 2025 | 28 May 2026 | 10 July 2025 |
| Deadline | 14 October 2025 | 13 January 2026 | 27 August 2026 | 5 November 2025 |
| Budget (EUR, m) | 705 | 673 | 747 | 500 |
| Estimated Number of Grants | 450 | 328 | 294 | 49 |
| Date to Inform Applicants – Step 1 | 28 April 2026 | 17 July 2026 | 29 January 2027 | 13 April 2026 |
| Date to Inform Applicants – Step 2 | 25 August 2026 | 11 December 2026 | 11 June 2027 | 14 August 2026 |
| Date to Inform Applicants – Step 3 | · | - | - | 27 October 2026 |
| Grant Agreement Signature Date | 22 December 2026 | 12 April 2027 | 16 November 2027 | 24 March 2027 |

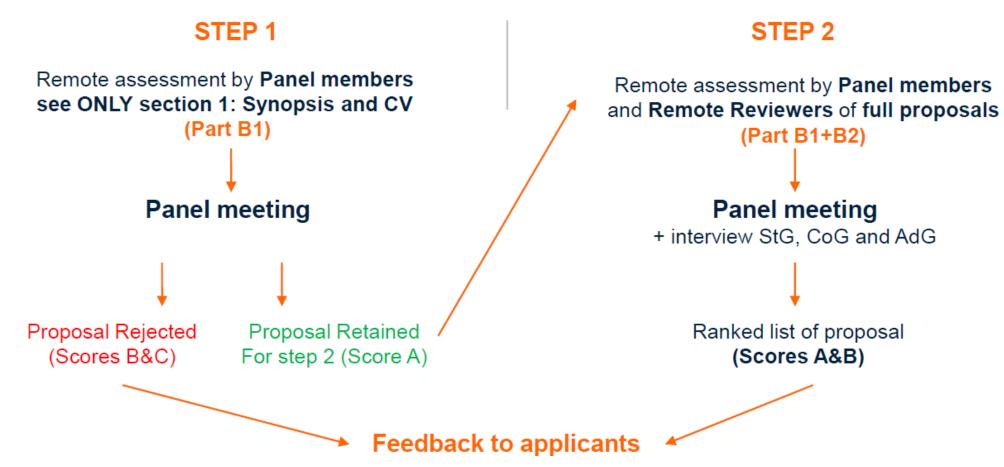








For individuals calls: a single submission but a two-step evaluation











Evaluation

Excellence

is the sole evaluation criterion

Excellence of the Research Project

- Ground breaking nature
- Scientific impact
- Scientific Approach

Excellence of the Principal Investigator

- Intellectual capacity
- Creativity
- Commitment





Eligibility Extensions:

- Parental leave now included alongside maternity and paternity as a separate category of leave to acknowledge the diversity of applicants' personal circumstances
- Gender-based or any other form of violence applicants who have been victims of violence are now eligible for an extension on these grounds





Additional Submission Restrictions for 2026 calls:

- Applicants to Synergy Grant 2025 call, who have obtained a score 'B' at Step 1 will not be eligible for the Synergy Grant 2026 call
- Current grantees applying for their next grant in 2026 must abide by the two-year rule (i.e. their current grant must end within two years of the call deadline) but extensions to the duration of the current project after the call deadline may be exceptionally granted without affecting the eligibility of the new proposal





Proposal Evaluation:

- At Step 1:
 - Assessment of Scientific Proposal Part I + CV and Track Record
 - Feasibility of the scientific approach will no longer be assessed at Step 1
 - Combination of scientific approaches to address scope and complexity of research questions in Synergy Grant will now be assessed at Step 2 (instead of Step 1)
- At Step 2:
 - Scientific Proposal Part I + Part II + CV and Track Record + Resources and Time Commitment (from Part A) + Annex on Grants/Grant Applications





Additional Funding (for both actual and lump sum cost models):

- One general category for additional funding without pre-defined sub-categories (examples provided)
- Applicant to define the purpose for which the additional funding is requested and justify the cost in the proposal
- Re-allocation of additional funding based on its necessity for the achievement of the project objectives









Participation of entities from certain countries

- Revised Annex 3 on the Participation of Associated Countries and Special Eligibility Conditions Applicable to Entities from Certain Countries, including:
 - Additional sanctions imposed on legal entities outside of Russia but largely directly or indirectly owned by entities established in Russia
 - Special measures applicable to entities from non-associated third countries in the Synergy Grant call for very specific topics in the interest of EU economic security (only relevant at granting stage, not evaluation)



Coming soon...Super Grant!



Introduction of the new scheme "Super Grant" under the umbrella of the ERC, designed to provide long-term support to outstanding scientists.

Main Objectives

- Attract global talent: Make Europe more appealing to leading scientists and researchers.
- **Provide long-term stability:** Offer 7-year grants to enable deep, groundbreaking research.

"We want Europe to become a magnet for the world's best minds" (U. von der Leyen)





Towards 2027...

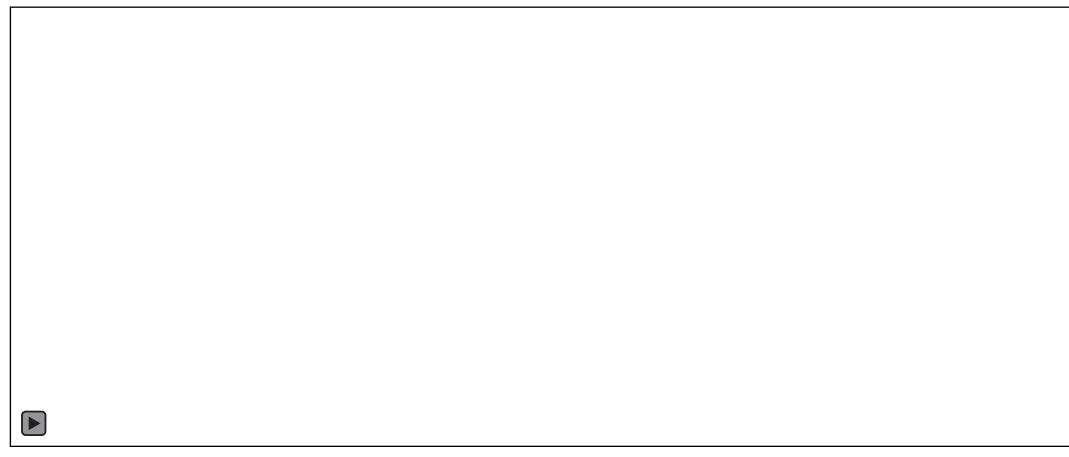
- New eligibility windows will apply to Starting and Consolidator Grant applicants in 2027 calls (note: till WP2027 is adopted, this is a plan not a legal provision)
 - Starting Grant applicants will be able to apply 0-10 years after successfully defending their PhD
 - Consolidator Grant applicants will be able to apply 5-15 years after successfully defending their PhD
 - Researchers will be awarded no more than one Starting Grant and one Consolidator Grant during their career
 - Rules for extensions will remain the same







Projects



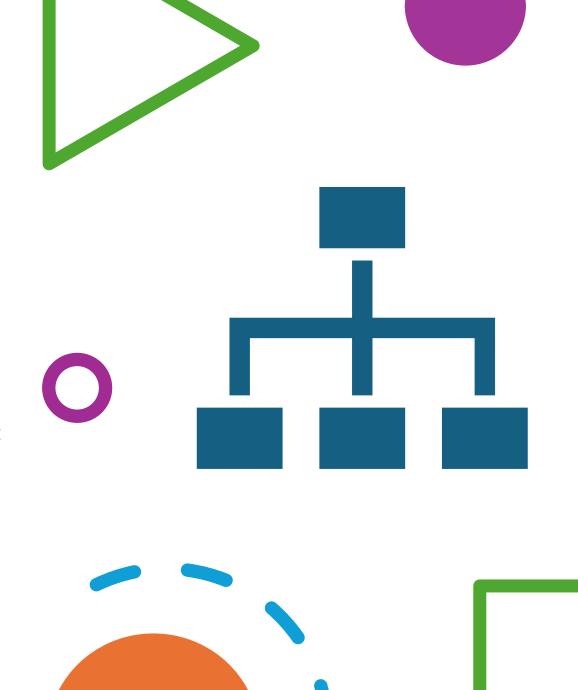


What is a project?

- ❖ A project is a temporary endeavor undertaken to deliver a unique result, product or service.
- * **Temporary:** it has a defined beginning and end in time, and therefore defined scope and limited resources.

❖ **Unique:** it means that the product or service is different in some distinguishing way from all similar products or services.

It is not a routine operation, but a specific set of operations designed to accomplish a singular goal. It creates something that did not exist before the project started.







It's not just putting fingers on a keyboard...

A careful planning is required







Planning is not only referred to the project content

You have to carefully plan the project writing process

Prepare your personal plan and define delivery dates and outputs

Set your milestones









Project planning

There are two indispensable tools to do that:

Calendar



Clock











Project planning

There are two indispensable steps before writing:

Collect Info

Analyse the call









Step 1

COLLECTING INFO: WHY?

- Understand and analyse the context
- # Have a wider perspective
- Movement Competitors & "ancestors"
- Identify hot topics
- Find your position





Collecting info: instruments

- Horizon Dashboard webinar quick guide
- CORDIS (Projects & Results section)
- Specific websites: <u>MSCA website</u>; <u>ERC Website</u>...
- Dedicated databases and support networks: <u>Radiance MSCA</u>; <u>ERC Dashboard</u>...



Step II



CALL ANALYSIS

WHAT?

- Situation: Call for proposal/Call for Tender/Prize
- Principles: Funding principles/ Mission & Vision/ History
- Rules & Requirements: Deadlines/ Platforms; eligibility criteria
- Key elements, Goals & Expectations: Role/Impact/Specific outputs
- Documents: Forms to be filled/ Documents to be provided
- Processes: Submission and evaluation steps; resubmission restrictions
- Audience: Scientific/ Technical/ Managerial/ Administrative; Generalist/ Expert; Human/ Non –human
- Competitors/Ancestors: Statistics/ success stories/ direct contacts









Call analysis: instruments

Funding & Tenders portal he single entry point for applicants to funding programs managed by the EC

Information provided:

- General information
- Type of call and action
- Deadline model (single/multiple-stage)
- Opening & deadline dates





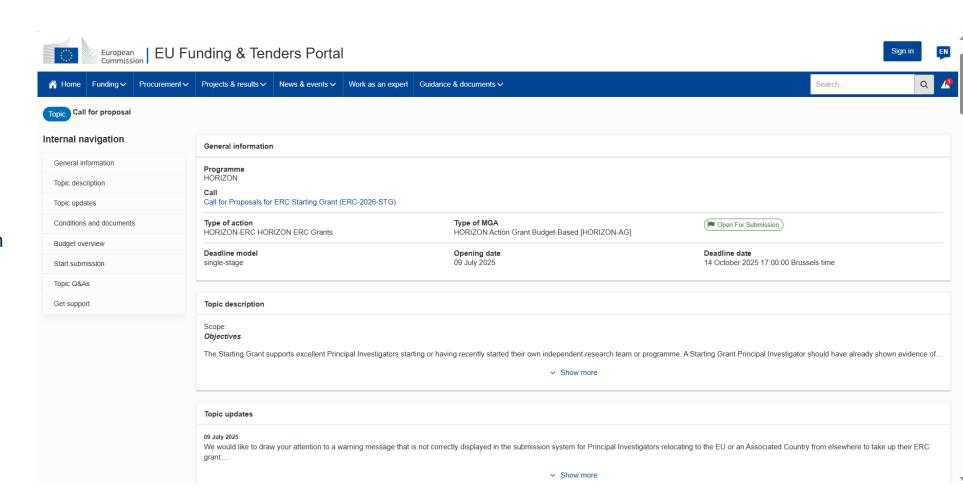




Funding and tenders portal

Submission system

Online platform for proposal submission









Funding and tenders portal

Information provided

- Topic description & conditions
- Objective
- Scope
- Expected impact
- Eligibility conditions
- Evaluation criteria, scoring and thresholds
- Indicative time for evaluation and grant agreement signature
- Submission and evaluation processes
- **Documents**







Funding and tenders portal

Official Documents:

- Work Programme
- Information for applicants
- Proposal templates
- Evaluation form
- Guide for peer reviewers
- Model Grant Agreement

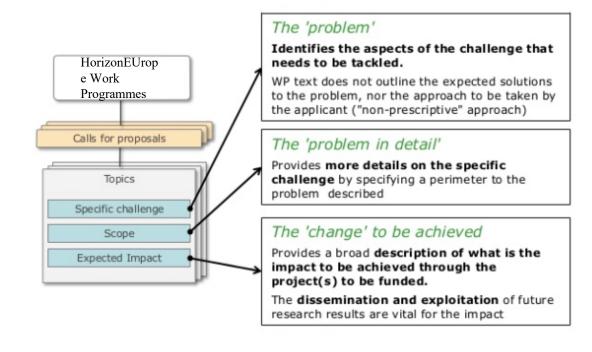
Other official documents





- Work programmes:
 general objectives
 and impact, and
 budgets
- ◆Call for proposals: eligibility, selection and award criteria, objectives/challenges and deadlines

◆Proposal templates (and Guide for Applicant): essential forms and guide to draw up and submit your proposal



Work Programmes are bi-annual documents, revised annually: priority topics are not identical over the years





Documents

Read carefully the call text and all related documents.

- The project proposal must be in line with all the requirements of the call text
- •
- Do not to neglect any piece of the call text when constructing your project proposal
- Having an excellent project at hand may not be enough. If it does not refer to all the elements of the call text – the project might not be ranked high compared to other projects that do cover all the elements
- Rule of thumb: have the call docs handy throughout the proposal development process and revisit it often. This will help in verifying that the proposal presentation does not divert from the call text requirements as the proposal develops.





Start writing but...









Have clear ideas: objectives and feasibility

Objectives

- ❖ Why is it relevant?
- Among other reasons this is important because this helps us to identify many key aspects and influences how we are going to tell our story, and so adapt also the state of the art.
- Let's start thinking about how we can **contribute** to answer to some open questions. So we have clear the questions first, then we restrict the field cropping our specific expertise and idea to face the challenge.

Objectives



- **General objective** explains why the project is relevant to a given community and what impact the results produced will have, otherwise not obtainable. Its nature is more **'speculative'**. Example: 'Dark Matter existence is an established and yet mysterious paradigm. **But what exactly is Dark Matter?**'
- **Specific objective** traces a more operational trajectory, narrowing down the various elements that need to be solved in relation to the general question. It explains in more operational terms **what the solution consists of**. The specific objective is closer to what will be the activities under the control of the project. Example 'The project will perform measurements in an unexplored part of the parameter space with a new detector and a new approach to measurements.'

These two levels are the drivers for the description of the state of the art

- With this distinction in mind we are able to make a firts comparison with state of the art, context, the need of the comminuty, colleagues from the community
- Collection of preliminary data and results, a first step with respect to the scope of the idea with its first validation / rough
 verification
- This step may require multiple **iterations**, and involve different levels of depth. One or more specific activities are activated for in-depth analysis and to gather information on the real potential.

Check your project plans



- Do you have a viable project?
- Does it fit with the call scope?
- Is there a level of innovation (i.e. going beyond the state of the art)?
- Are there uniquenesses of the concepts?
- Does it have a measurable impact?
- Do you have an achievable timeline?
- (for collaborative projects) Is your consortium strength for the purpose of the project?









Proposal preparation







General tips and tricks

- Set your project up in close collaboration with your future supervisor/partners
- You need to address all of the award criteria (Keep the award criteria scheme and the self-evaluation checklist * by you while writing your proposal to ensure you cover each point fully)
 - if you do not address (sufficiently) the issues raised by the evaluation criteria, you may not obtain any mark in that criteria
- Do not rely solely on former projects you might get your hand on. <u>Structure</u>, <u>award</u> <u>criteria</u>, <u>page limits etc. might change from year to year</u>.
- Expected impact: study the impact requirements extremely carefully check that your proposed project satisfy all the impact requirements of the topic.





General tips and tricks

- ◆Be empathic and emphatic with the reviewers
- ◆Evaluators would like to have: **minimum effort** (easy to read, follow and assess against the criteria) and **maximum accuracy** (easy to provide feedback)
- ◆Facts and external references supporting your statement instead of opinions
- ◆Be concise: Avoid open / empty statements. Go to the point and provide 'just enough' details needed to cover what is requested by the call and for the reader to understand
- ◆Template is repetitive: Be repetitive (or refer to the place where you elaborate on the topic)



General tips and tricks

- ◆You can slightly influence the type of evaluator will read your proposal:
 - *Choose the right evaluation panel: if you do not clearly belong to one, choose the one (you think) can best appreciate your CV and the core of your project
 - ❖Avoid open/ambiguous terms, acronyms, jargon
 - *Evaluator are chosen matching keywords (and abstract) of your proposal and the keywords they used to define themselves (field of expertise)
 - Check the public list of evaluators (if available) of the previous year. Think of 3-4 persons who would be the excellent evaluators for your proposal: What keywords do they use to define themselves?



Potentially fatal mistakes

- ◆No respect for instructions.
- ◆Lack of understanding of the evaluation criteria
- ◆Poor analysis and description of the starting points (e.g. state of the art) and the objectives
- ◆Insufficient detail given of planned activities as evidence to convince evaluators of impact
- ◆Poor impact analysis
- ◆Small relevance of the project for the call objectives (e.g. a proposal with no planned training for the ER has small relevance for a MSCA PF)
- ◆Text of different parts of your proposal is not consistent: evaluator get confused!









Questions?



Thank you!

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