Instructions for drafting "part B" of the proposal

Instructions for preparing proposal Part B for Marie Curie Initial Training Networks

A description of this action is given in section 2 of the Guide for Applicants. Please examine it carefully before preparing your proposal.

This annex provides guidelines for drafting Part B of the proposal.
It will help you to present important aspects of your planned work in a way that will enable the experts to make an effective assessment against the evaluation criteria (see Annex 2).

General information

Part B of the proposal contains the details of the proposed research and training programmes along with the practical arrangements foreseen to implement them and their impact. They will be used by the independent experts to undertake their assessment. We would therefore advise you to address each of the evaluation criteria as outlined in the following sections. Please note that "Explanatory notes" in the following serve to illustrate the evaluation criteria without being exhaustive. To draft your proposal you should also consult the current version of the People Work Programme.

For practical reasons, you are invited to structure your proposal according to the headings indicated in the table of contents.

Please note that this call will be a single-stage proposal submission and evaluation procedure. The template for the submission can be downloaded from the EPSS.

Proposal page limits: In order to ensure comparability between proposals the maximum length of Part B is 30 A4 pages (excluding table of contents, specific section on the capacity of each participant, section B7 (ethical issues), letter of commitment from associated partners, if any such partners, and start and end pages). Applicants must ensure that proposals conform to the page limits and layout given in this Guide for Applicants, and in the proposal part B template available through the EPSS. The experts will be instructed to disregard any pages exceeding these limits. Even where no page limits are given, or where limits are only recommended, it is in your interest to keep your text concise since over-long proposals are rarely viewed in a positive light by experts.

Please remember that it is up to you to verify that you conform to page limits. There is no automatic check in the system!

The **minimum font size** allowed is **11** points. The page size is A4, and all **margins** (top, bottom, left, right) should be at least **15 mm** (not including any footers or headers).
Ensure that the font type chosen leads to clearly readable text (eg. Arial or Times New Roman).

As an indication, such a layout should lead to a maximum of between 5000 and 6000 possible characters per page (including spaces).

Associated partners must include a **letter of commitment** in the proposal to ensure their real and active participation in the proposed network. The experts will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.

- Please make sure that you use the right template to prepare your proposal;
- You respect the maximum number of pages.
- Part B of your proposal carries the proposal acronym as a header to each page and that all pages are numbered in a single series on the footer of the page to prevent errors during handling. It is recommended that the numbering format “Part B - Page X of Y” is used;
- Your proposal is complete, including the set of forms requested for **Part A** as well as a free text **Part B**. **The final version of Part B must include the letters of commitment from associated partners (where applicable).**

Incomplete proposals are not eligible and will not be evaluated.

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PEOPLE
MARIE CURIE ACTIONS

Marie Curie Initial Training Networks (ITN)
Call: FP7-PEOPLE-2010-ITN

PART B

“PROPOSAL ACRONYM”

Table of Contents

To draft PART B of the proposal applicants should take into account the following structure. If required for the description of the project, applicants may wish to add further headings.

PART B (max. 30 A4 pages!)

Practical Information:

- *PART B shall be limited to **30 A4 pages** (excluding table of contents, specific section on the capacity of each participant (tables B5.1a), section B7 (ethical issues), letter of commitment from associated partners, if any such partners, start and end pages).*
- *Proposals are evaluated against **four criteria**, these being "**S&T Quality**" (30%), "**Training**" (30%), **"Implementation"** (20%) and **"Impact"** (20%). The weight of each of the criteria is shown in the brackets.*
- *Please make sure that the **free text** used to describe the proposed project takes into account the issues covered by the 4 evaluation criteria.*
- *In addition, applicants are requested to provide information on ethical aspects (where relevant) and information on participation in previous projects under the Marie Curie actions.*

B.1 LIST OF PARTICIPANTS

Please provide an overview of the consortium composition by giving details of the legal entity, the department carrying out the work and the person-in-charge of the project.

In addition, partners contributing to the research training programme – without being formally part of the consortium (associated partners) – should be named.

All Participants	**For Private sector participants, please tick** ✓	**Country**	**Legal Entity Name**	**Department /Division/ Laboratory**	**Scientist-in-charge**
Full Network Partners (beneficiaries)					
-					
-					
-					
Associated Partners					
-					
-					

B.2 PROJECT OVERVIEW AND OBJECTIVES

Please provide an introduction to the proposal, describing its main objectives and how they will be achieved.

B.3 S&T QUALITY (30%)

In assessing the proposal, experts will be asked to review this criterion on the following basis (see People Work programme Annex 2, table 2.1).

- S&T objectives of the research programme, including in terms of inter/multi-disciplinary, intersectoral and/or newly emerging supra-disciplinary fields.
- Scientific quality of the research programme.
- Appropriateness of research methodology.
- Originality and innovative aspects of the research programme. Knowledge of the state-of-the-art. Where appropriate, plans for exploitation of results.
- Contribution of the private sector and, where relevant, other socio-economic actors in the research programme

Explanatory note:

The scientific part of the proposal should allow experts to assess the quality of **the proposed scientific and technological area**, including interdisciplinary and inter-sector aspects (where relevant for the research area) taking into account the foreseen **participation of private sector**.

Please provide a detailed description of the research topics and of the **research sub-programmes** to be implemented by the network teams, highlighting planned research collaborations. Indicate how the individual projects of the recruited researchers will be integrated into the overall research training collaboration.

Explain the key elements of the **research methodologies** that will be followed, taking into consideration ethical and other relevant issues, where appropriate. If necessary, describe how complementary methods will be integrated.

The text should contain information on the current **state of the art** and the **objectives** of the research programme. It should describe how the synergies/complementarities between the teams will be exploited to create an innovative research environment in the chosen field. Describe the plans for exploitation of results if applicable.

Describe how the private sector participant(s) and, where relevant, other socio-economic actors contribute to the research programme.

If relevant, and more specifically for mono-site proposals, **the role of associated partners** (which are not formally partners of the consortium) and their active contribution to the research activities should also be described.

B. 4 TRAINING (30%)

In assessing the proposal, experts will be asked to review this criterion on the following basis (see People Work programme Annex 2, table 2.1).

- Quality of the training programme. Consistency with the research programme. Contribution and relevance to the training programme of the private sector and, where appropriate, of other socio-economic actors. Complementary skills offered: Management, Communication, IPR, Ethics, Grant writing, Commercial exploitation of results, Research policy, Entrepreneurship, etc.

(Cont'd)

- Importance and timeliness of the training needs (e.g. multidisciplinary, intersectoral and newly emerging supra-disciplinary fields).
- Appropriateness of the size of the requested training programme with respect to the capacity of the host.
- Where applicable, relevance of the role of visiting researcher(s) with respect to the training programme
- a) For multi-site proposals: Adequate combination of local specialist training with network-wide training activities.

  b) For mono-site proposals: Adequate exploitation of the international network of the participants, including the private sector, for the training programme

Explanatory note:

The description of the training programme should allow for assessing the need for research training in the chosen scientific area as well as the quality of the proposed training measures with regard to the targeted researchers.

Please provide a **description of the proposed training programme**, including:

- Content (overview of the various training elements, including training in scientific and complementary skills; articulation of the individual research projects within the overall proposed training programme);
- Structure (local versus network-wide training activities);
- Role and foreseen contribution of participants from within and outside the network to the training programme.
- Role of the private sector in the training programme
- Role of the supervisory board in the definition of the skills requirements

The proposal should clearly show how the network's potential will be exploited for the benefit of the researchers over and above that which could be provided in a narrow, national context.

Mono-site applications must clearly demonstrate how an international network of **associated training partners including the private sector** will be concretely involved in the training programme.

Specify the number of early-stage and experienced researchers (including visiting researchers) to be recruited in terms of **person-months** as well as the breakdown of this number by participant (see model table). Indicate the length of the appointments for early-stage and/or experienced researchers.
The values and information provided in this table of part B must be consistent with those declared in Part A4 of the proposal submission forms.

It is important that a sound justification is provided for the **proposed balance of early-stage versus experienced researchers** *(see section 2.3.4 of this guide)* and that the **role of the visiting researchers** is well defined, where relevant.

	Early-stage and experienced researchers to be financed by the grant agreement			
Network Team	Early-stage researchers (ESR) (person-months) (A)	Experienced researchers (ER) (person-months) (B)	Visiting researchers (VR) (person-months) (C)	Total (A+B+C)[1]
1				
2				

B.5 IMPLEMENTATION (20%)

In assessing the proposal, experts will be asked to review this criterion on the following basis (see People Work Programme Annex 2, table 2.1).

- Capacities (expertise/human resources/facilities/infrastructure/private sector involvement) to achieve the research training programme and access of fellows to these resources. Adequacy of task distribution and schedule.
- Private sector involvement at the highest possible level appropriate to the research topic, and sufficient evidence of commitment.
- Adequate exploitation of complementarities and synergies among partners in terms of research and training.
- How essential is non-ICPC Third Country participation, if any, to the objectives of the research training programme?
- Appropriateness of the plans for the overall management of the training programme (demarcation of responsibilities, rules for decision making, composition of supervisory board including involvement of the private sector); also working conditions, transparency of recruitment process and career development in coherence with the principles of the 'Code of conduct for the Recruitment of Researchers'.
- Networking and dissemination of best practice among partners. Clarity of the plan for organising training events (workshops, conferences, training courses).

Explanatory note:

Please describe in a specific section **the capacities of each host institution** (both full network members and associated partners, if any) in terms of research expertise, human resources, facilities and infrastructure to demonstrate that each network team has sufficient resources to host and/or offer a suitable environment for training and transfer of knowledge to recruited early-stage and experienced researchers (half a page maximum by participant).Each team should supply information on the **key scientific staff** who will be involved in the research and training, their individual expertise and the foreseen extent of involvement (in percentage of full time employment).

List ONLY the three most significant recent publications for each of the teams in the network.

[1] **The values provided in columns (A), (B) and (C) of this table of part B, must be consistent with those declared in Part A4 of the proposal submission forms.**

An optional template is provided under table 5.1.a to draft this specific section that will be excluded from the page count.

On top of this specific section on capacities of participants, provide an **overview of the work** plan showing work packages (see table B5.1a below), foreseen deliverables (see table B5.1b below), task distribution, milestones (see table B5.1c below), and schedule. The schedule should be in terms of number of months elapsed from the start of the network programme.

Describe clearly the **level and nature of private sector participation** in the network (see section 2.2.1.6 of this guide). Ensure that the private sector involvement is at the highest possible level in function of the training programme and the research discipline (note that socio-economic actors cannot substitute any participant from the private sector).

Provide clear **evidence of the commitment of associated partners** to be involved (a letter included within the PDF file of part B).

Describe in practical terms, how the teams complement each other and how **possible synergies** will be exploited to benefit the research training programme. Where relevant, highlight the involvement of **participants from different sectors** (academia, private sector, others) and provide details on the nature of the collaborations.

If one or more of the network teams is based in a **third country** which is not an ICPC country or in an **international organisation**, special care must be taken in the proposal to explain why the involvement of this team is essential to the success of the research training programme, since only in exceptional cases will these organisations receive Community funding.

Describe the **organisation and management structure** of the network and the techniques to be used to co-ordinate its activities as well as the methods foreseen to ensure good **communication** between the research teams and **monitoring** progress.

Outline the **financial management strategy** of the network. Any relevant project management experience of the participants should be described (such as previous and current involvement in projects under the Marie Curie Actions).

Describe the composition and function of the **supervisory board**.

The proposal should contain information on the **recruitment strategy** to meet the request for competitive international recruitment and to promote equal opportunities, including information on conditions of employment. Explain how you intend to act in line with the principles of the European Charter for Researchers and the Code of Conduct for their recruitment. Describe how you intend to ensure that gender balance is also addressed at the level of decision-making when implementing the project.

Outline the practical steps the network would take to ensure effective **dissemination of the results** of the joint research training programme, both during the project duration and after completion of the grant agreement.

Where appropriate, describe the approach to be taken regarding any **intellectual property** that may arise from the research activities of the network.

Optional templates for Section B5:

Table B5.1a Host capacities

(1 table per partner – maximum half a page /table)

Full Partner X.	
General description	
Role	
Key competences and facilities	
Key persons	
Previous training programs and research	

Associated Partner Y.	
General description	
Role	
Key competences and facilities	
Key persons	
Previous training programs and research	

Table B5.1b Work package list

Work package No[1]	Work package title	Type of activity[2] (e.g: research, training, dissimination, etc.)	Lead beneficiary No[3]	Lead beneficiary short name	Person-months[4] (only ESR, ER, VR)	Start month[5]	End month
		TOTAL					

Table B5.1c Deliverables List

Del. no.[6]	Deliverable Title	WP no.	Person months (ESR/ER/VR)	Nature[7]	Dissemination level[8]	Delivery date[9]

1 Work package number: WP 1 – WP n.

2 Please indicate one activity per work package:

3 Number of the participant leading the work in this work package.

4 The total number of person-months allocated to each work package.

5 Measured in months from the project start date (month 1).

6 Deliverable numbers in order of delivery dates. Please use the numbering convention <WP number>.<number of deliverable within that WP>. For example, deliverable 4.2 would be the second deliverable from work package 4.

7 Please indicate the nature of the deliverable using one of the following codes:
R = Report, **P** = Publication, **E** = Events, **O** = Other

8 Please indicate the dissemination level using one of the following codes:
PU = Public

RE = Restricted to a group specified by the consortium (including the Commission Services).
CO = Confidential, only for members of the consortium (including the Commission Services).

9 Measured in months from the project start date (month 1).

Table B5.1d List of milestones

Milestones are control points where decisions are needed with regard to the next stage of the project. For example, a milestone may occur when a major result has been achieved, if its successful attainment is required for the next phase of work. Another example would be a point when the consortium must decide which of several technologies to adopt for the next phase of the project.

Milestone number	Milestone name	Work package(s) involved	Lead beneficiary	Expected date [1]	Comments[2]

B.6 IMPACT (20%)

In assessing the proposal, experts will be asked to review this criterion on the following basis (see People Work Programme Annex 2, table 2.1). Be aware that this section is very important because of the policy implications (Impact is the second criteria in case of ex-aequo proposals).

- Contribution of the proposed training programme to the improvement of the career prospects of the fellows and the acquisition of skills needed in both the public and private sectors.
- Contribution of the training programme to the policy objective of structuring initial research training capacity at the European level (through establishing longer term collaborations and /or lasting structured training programmes between the partners' organisations).
- The contribution of the training programme towards the policy objective of enhancing public-private sector collaborations in terms of research training.
- Where appropriate, mutual recognition by all partners of the training acquired, including training periods in the private sector.

Explanatory note:

The chapter outlining the impact of the project shall allow experts to assess the **immediate and longer term benefits** of the proposed research training programme **at the level of the individual** (early-stage and experienced) **researchers.** Please specify how the training programme is expected to enhance the researchers' capacity to progress in research, as well as their capabilities to work and/or communicate across disciplines and public and private sectors.

Describe how the proposed programme addresses the policy objective of structuring initial research training capacity at the European level and between **the participating institutions.** The proposal should provide information on the benefits of the research training collaboration for the

[1] Measured in months from the project start date (month 1).
[2] Show how you will confirm that the milestone has been attained. Refer to indicators if appropriate. For example: a laboratory prototype completed and running flawlessly; software released and validated by a user group; field survey complete and data quality validated.

institutions involved. More specifically, it should outline how the proposed programme will foster existing and/or create new collaborations in the chosen area of research training.

The proposal should provide information on the benefits of the project **to enhance the collaboration between the public and private sector** and in terms of addressing the training needs of new researchers.
Highlight novel opportunities for scientific and training collaborations between the participating institutions (e.g. between academia and private sector). This could include, for example, formalising agreements of mutual recognition of training modules by all partners including the private sector.

B.7 ETHICAL ISSUES

*Please note that any ethical review will be performed **solely** on the basis of the information available in the proposal (projects raising specific ethical issues such as research intervention on human beings[1]; research on human embryos and human embryonic stem cells and non-human primates are automatically submitted for ethical review).*

Describe any ethical issues that may arise in the proposal. In particular, you should explain the benefit and burden of the experiments and the effects it may have on the research subject.

The following special issues should be taken into account:

Informed consent: When describing issues relating to informed consent, it will be necessary to illustrate an appropriate level of ethical sensitivity, and consider issues of insurance, incidental findings and the consequences of leaving the study.

Data protection issues: Avoid the unnecessary collection and use of personal data. Identify the source of the data, describing whether it is collected as part of the research or is previously collected data being used. Consider issues of informed consent for any data being used. Describe how personal identity of the data is protected.

Use of animals: Where animals are used in research the application of the 3Rs (Replace, Reduce, Refine) must be convincingly addressed. Numbers of animals should be specified. Describe what happens to the animals after the research experiments.

Human embryonic stem cells: Research proposals that will involve human embryonic stem cells (hESC) have to address all the following specific points:

- the applicants should demonstrate that the project serves important research aims to advance scientific knowledge in basic research or to increase medical knowledge for the development of diagnostic, preventive or therapeutic methods to be applied to humans.

- **the necessity to use hESC in order to achieve the scientific objectives set forth in the proposal. In particular, applicants must document that appropriate validated alternatives (in particular, stem cells from other sources or origins) are not suitable and/or available to achieve the expected goals of the proposal. This latter provision does not apply to research comparing hESC with other human stem cells**.

[1] Such as research and clinical trials involving invasive techniques on persons (e.g. taking of tissue samples, examinations of the brain).

- the applicants should take into account the legislation, regulations, ethical rules and/or codes of conduct in place in the country(ies) where the research using hESC is to take place, including the procedures for obtaining informed consent.
- the applicants should ensure that all hESC lines to be used in the project were derived from embryo's.
    - of which the donor(s)' express, written and informed consent was provided freely, in accordance with national legislation prior to the procurement of the cells;
    - that result from medically-assisted *in vitro* fertilisation designed to induce pregnancy, and were no longer to be used for that purpose;
    - of which the measures to protect personal data and privacy of donor(s), including genetic data, are in place during the procurement and for any use thereafter. Researchers must accordingly present all data in such a way as to ensure donor anonymity;
    - of which the conditions of donation are adequate, and namely that no pressure was put on the donor(s) at any stage, that no financial inducement was offered for donation for research at any stage and that the infertility treatment and research activities were kept appropriately separate.

Identify the countries where research will be undertaken and which ethical committees and regulatory organisations will need to be approached during the life of the project.

Include the Ethical issues table below. If you indicate YES to any issue, please identify the pages in the proposal where this ethical issue is described. Answering 'YES' to some of these boxes does not automatically lead to an ethical review. It enables the independent experts to decide if an ethical review is required. If you are sure that none of the issues apply to your proposal, simply tick the YES box in the last row.

(No maximum length for Section B.7: Depends on the number of such issues involved)

To ensure compliance with ethical principles, the Commission Services will undertake ethics audit(s) of selected projects at its discretion. A dedicated website that aims to provide clear, helpful information on ethical issues is now available at: http://cordis.europa.eu/fp7/ethics_en.html

ETHICAL ISSUES TABLE

(Note: Research involving activities marked with an asterisk * in the left column in the table below will be referred automatically to Ethical Review)

	Research on Human Embryo/ Foetus	YES	Page
*	Does the proposed research involve human Embryos?		
*	Does the proposed research involve human Foetal Tissues/ Cells?		
*	Does the proposed research involve human Embryonic Stem Cells (hESCs)?		
*	Does the proposed research on human Embryonic Stem Cells involve cells in culture?		
*	Does the proposed research on Human Embryonic Stem Cells involve the derivation of cells from Embryos?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	Research on Humans	YES	Page
*	Does the proposed research involve children?		
*	Does the proposed research involve patients?		
*	Does the proposed research involve persons not able to give consent?		
*	Does the proposed research involve adult healthy volunteers?		
	Does the proposed research involve Human genetic material?		
	Does the proposed research involve Human biological samples?		
	Does the proposed research involve Human data collection?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	Privacy	YES	Page
	Does the proposed research involve processing of genetic information or personal data (e.g. health, sexual lifestyle, ethnicity, political opinion, religious or philosophical conviction)?		
	Does the proposed research involve tracking the location or observation of people?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	Research on Animals	YES	Page
	Does the proposed research involve research on animals?		
	Are those animals transgenic small laboratory animals?		
	Are those animals transgenic farm animals?		
*	Are those animals non-human primates?		
	Are those animals cloned farm animals?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	Research Involving Developing Countries	YES	Page
	Does the proposed research involve the use of local resources (genetic, animal, plant, etc)?		
	Is the proposed research of benefit to local communities (e.g. capacity building, access to healthcare, education, etc)?		
	I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

	Dual Use	YES	Page
	Research having direct military use		
	Research having the potential for terrorist abuse I CONFIRM THAT NONE OF THE ABOVE ISSUES APPLY TO MY PROPOSAL		

ENDPAGE

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