H2020
Marie Skłodowska-Curie Actions

764879 EASITrain
Mid-term check   (at M15)
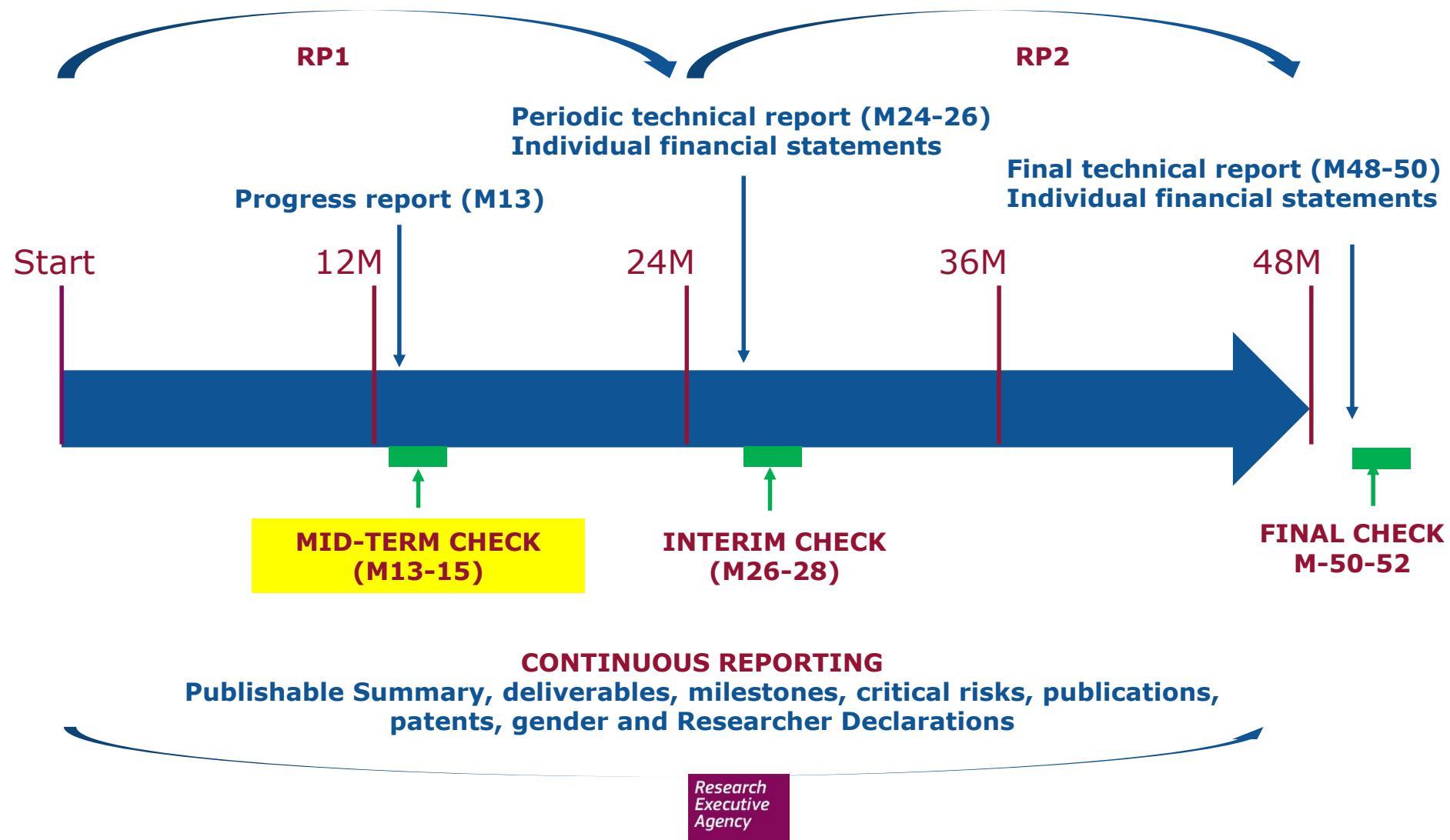
Ioannis BITSIOS (REA)
Maria VILI (REA)
Brussels, 10 December 2018

REA Monitoring Project Implementation

✓Covers technical, legal & administrative aspects

✓Technical implementation: project needs to be implemented as described in Annex 1 (Description of the action – DoA) of the Grant Agreement (GA).

✓Legal & administrative implementation: the project's activities need to comply with the obligations under the GA.

✓In order for the Agency to verify that the project is implemented properly, the beneficiaries must submit any information requested, and in particular the deliverables and reports specified in the GA.

Project timeline

European Commission

RP1

RP2

Periodic technical report (M24-26)
Individual financial statements

Final technical report (M48-50)
Individual financial statements

Progress report (M13)

Start 12M 24M 36M 48M

MID-TERM CHECK (M13-15)

INTERIM CHECK (M26-28)

FINAL CHECK M-50-52

CONTINUOUS REPORTING
Publishable Summary, deliverables, milestones, critical risks, publications, patents, gender and Researcher Declarations

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Monitoring Project Implementation

✓Continuous reporting: as soon as the GA is signed and the start date of the project is due, the 'continuous reporting' module is available.

Allows consortium to continuously update publishable summary, deliverables, milestones, <u>Researcher's Declaration</u>s etc. and allows the REA to monitor the project.

A MID-TERM CHECK is organized <u>on-site</u> to assess the project after one year (M13-15).

✓ Periodic reporting: at the end of each reporting period, the coordinator has 60 days to submit a periodic/final report (Art. 20 of the GA).

An INTERIM and FINAL CHECK is organized <u>remotely</u> to assess the progress of each reporting period (can be carried out on site if necessary).

Mid-Term check

- ITN consortia shall organize this check according to Art. 19.1 of the GA

- Art. 19.1:

  - The coordinator must:
    - establish a Supervisory Board
    - submit any deliverables identified in Annex 1
    - submit a 'Researcher's Declaration' within 20 days after the recruitment of each researcher
    - submit a progress report
    - organize a mid-term meeting

Researchers Declarations (RDs) contain:
- **Personal data (name, date of birth, nationality, gender, family charges, email of researcher, etc.)**
- **Data related to the project allowances: start date and end date of recruitment/secondment, hosting institution, etc.**
- **RD is a basis for IFS (Individual Financial Statement) and thus needs to be regularly updated (particularly before submission of periodic report)**

Researcher Declaration

Full Time (100%)
Suspension (0%)
Part time (1 – 99%)
Maternity Leave (0%)
Parental Leave (0%)

Mid-Term check

Objectives:

- ▪ Assessment of the recruitment progress and procedures

- ▪ Clarification/verification of the eligibility rules for fellows

- ▪ Raising awareness on the rights and obligations of fellows and beneficiaries

- ▪ Assessment of any deviation of the original training programme

- ▪ Constructive dialogue between network participants

- ▪ Definition of contingency plans if necessary

Mid-term check

Particular attention is paid to:

- Recruitment

- Analysis of deliverables and milestones (related to management and recruitment)

- Management (activities of the Supervisory Board, etc.)

- Ethical issues (if applicable)

- Financial aspects (if necessary)

- Critical implementation risks and mitigation action

- Any proposed re-orientations of the networks' activities.

- Document management and Open Research Data (if applicable)

Mid-term check

ESR's rights:

- Administration: Researcher's Declarations, Grant Agreement provisions awareness, working conditions (employment contracts, eligible allowances, visa issues, administrative support), tuition fees
- Career development plan
- Supervision and integration: quality of the supervision, integration within the research team/the network/ the host institution/the country
- Planned training activities, individual research projects, secondments, PhD courses, planned courses, workshops/conferences, language courses and complementary skills training.

- What's next?
  - Implement any required corrective action
  - Prepare for the next check

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Interim check (Art. 20.3 of the GA)

- Remote assessment unless otherwise agreed with PO

  - Necessary to submit within 60 days of the end of the 1st reporting period:

    (1) Periodic technical report
    (2) Periodic financial report- Individual Financial Statement/ Beneficiary

Electronic submission via the SEDIA; electronic signature

Periodic technical report has 2 parts:

- Part A (publishable summary, deliverables, milestones, etc., answer to H2020 KPIs) – retrieved from Continuous Reporting
- Part B (explanation work carried out, overview of progress, explanation on deviations from DoA) – uploaded as **.pdf** in the Funding & tender opportunities - Single Electronic Data Interchange Area (SEDIA) (ex Participant Portal)

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Final check (Art. 20.4 of the GA)

- Remote assessment unless otherwise agreed with PO
  - Necessary to submit within 60 days of the end of the 2nd reporting period:
  (1) Final technical report (is a publishable summary of the entire project)
  (2) Final financial report

Electronic submission via the SEDIA; electronic signature

Final report has 2 parts:

(a) '**final technical report**' with a summary for publication containing:
  (i) an overview of the results and their exploitation and dissemination;
  (ii) the conclusions on the action, and
  (iii) the socio-economic impact of the action;

(b) '**final financial report**' containing a '**final summary financial statement**', created automatically by IT-system, consolidating the individual financial statements for all reporting periods and including the **request for payment of the balance**.

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Types of costs

- **A. Costs for recruited researchers**

Researcher				Institution	
Living allowance*	Mobility allowance	Family allowance		Research, training and networking costs	Management and indirect costs
3 110	600	500		1 800	1 200

- **B. Institutional costs (their eligibility is linked to the eligibility of the researchers)**

  B.1 Research, training and networking costs
  B.2 Management and indirect costs

- *Sick leave:*
  - **For short term leave (≤ 30 days) a full unit is eligible;**
  - **Periods in which a researcher was absent for more than 30 days (for reasons other than normal annual leave), costs CANNOT be charged to the action (and must be removed from the financial statement, by changing the researcher declaration).**

- *No subcontracting for ITNs*

1 unit = 1 month of eligible ESR

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B1. Research, training and networking costs

How much?

Fixed amount of EUR 1 800 per implemented person-month

What is it used for?

➢ Research costs

➢ Training courses

➢ Participation of researchers in training events and conferences

➢ Secondments (including travel and accommodation)

➢ Co-ordination between participants

➢ Visa costs for recruited fellows

➢ Tuition fees (if any): *MSCA-ITN researchers may NOT be requested to pay tuition (enrollment etc) fees for their research training and/or PhD degree programme from their own funds.*

The <u>use</u> of institutional costs is decided by the beneficiary

How is it distributed between the beneficiaries?

➢ Calculated according to the person-months implemented per beneficiary

➢ The full amount must be reported by the beneficiary recruiting the fellow

➢ The consortium can agree to distribute it differently, in which case it should be addressed in the consortium agreement, but not in the reports

How much?

- ➢ Fixed amount of EUR 1 200 per implemented person-month

How it is split between management and overheads?

- ➢ Split between management and overheads decided by beneficiaries
- ➢ Ensure enough budget is allocated to implement the management tasks described in the Annex 1

How is it distributed between the beneficiaries?

- ➢ It is a decision of the consortium. Usually the coordinator retains the largest share of the management costs (e.g. for hiring a project manager). The distribution should be addressed in the consortium agreement

What is it used for?

➢ Costs associated with the preparation of the reports and other documents required by the REA:

- Researcher declarations, deliverables, ethics, progress report, periodic and final reports

➢ Personnel costs of the Project Manager

➢ Maintenance of the consortium agreement

➢ The overall legal, ethical, financial and administrative management for each of the beneficiaries

➢ Indirect costs of the action

Exchange rate

➢ Financial statements must be drafted in euro.

➢ Beneficiaries using another currency must convert the costs into
   euro at the <u>average of the daily exchange rates</u> published in the
   Official Journal of the European Union, calculated over the
   corresponding reporting period.

   *http://www.ecb.europa.eu/stats/exchange/eurofxref/html/index.en.
   html*

Role of the Coordinator

- Article 41.2b of the GA

  - Monitor that the action is implemented properly
  - Act as intermediary for all communication between consortium and the REA
  - Request and review any document or information required by the REA
  - Submit the deliverables and reports to the REA
  - Ensure that all payments to other beneficiaries are made without unjustified delay
  - Inform the REA of the amounts paid to each beneficiary

Coordinator cannot delegate these tasks to any other beneficiary or subcontract them to a third party

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Role of the Beneficiaries

- Article 41.2a of the GA

  - Keep the Beneficiary Register up to date
  - Inform the coordinator of events likely to affect the implementation of the project
  - Submit to the coordinator in good time
    - Individual financial statements
    - Data needed to draw up the technical reports
    - Ethics committee opinions/notifications/authorizations for activities raising ethics issues
    - Any other document required by the REA

Beneficiaries are jointly liable for the technical implementation of the action.

Beneficiaries have individual responsibility for their own financial statement.

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Links

- **Funding & tender opportunities - Single Electronic Data Interchange Area (SEDIA)**

  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

- **Funding & tender opportunities – H2020 Online Manual**

  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/support/manuals

- **Marie Sklodowska-Curie Actions – ITN**

  http://ec.europa.eu/research/mariecurieactions/actions/research-networks_en

- **Marie Skłodowska-Curie Actions Work Programme 2016-17**

  http://ec.europa.eu/research/participants/data/ref/h2020/wp/2016_2017/main/h2020-wp1617-msca_en.pdf

- **Guide for Applicants ITN 2017**

  http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-itn_en.pdf

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Links

Documents/Info

➢ **Euraxess Portal:**

http://ec.europa.eu/euraxess/

➢ **Register as an expert (for PIs):**

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/work-as-an-expert

➢ **Register to Marie Curie Alumni Platform (for MC fellows):**

https://www.mariecuriealumni.eu

➢ **Information Package for MSCA fellows (rights and obligations):**

https://ec.europa.eu/research/mariecurieactions/sites/mariecurie2/files/information-package-msca-fellows-1.2_en_0.pdf

*Annex I to the Grant Agreement
(to be circulated to all ESRs)

EUROPEAN COMMISSION
Directorate-General for Education, Youth, Sport and Culture

Innovation, International Cooperation and Sport
Marie Skłodowska-Curie Actions

Information note for Marie Skłodowska-Curie Fellows in Innovative Training Networks (ITN)[1]

Version: 1, Date of release: 11 August 2017

This document complements the general *Information package for Marie Skłodowska-Curie fellows[2]* with information on the conditions of appointment and remuneration specifically for those holding an MSCA fellowship as part of an Innovative Training Network (ITN). Quotations in italics are from the model grant agreement for ITN.

1. What are Innovative Training Networks (ITN)?
ITNs are competitively awarded, multi-beneficiary, international research and training networks providing post-graduate training in specific and inter-disciplinary scientific fields. They bring together networks of research-performing institutions – from both the academic and non-academic sectors – around a common research and training programme to strengthen the career perspectives of early-stage researchers and to support entrepreneurship, creativity and innovation across Europe. About 110-130 separate new projects are financed every year.

ITNs can come in three different forms:

- **European Training Networks (ETN):** most ITN projects are implemented as ETNs, composed of at least three organisations established in at least three different EU Member States (MS) or Horizon 2020 Associated Countries (AC)[3].
- **European Industrial Doctorates (EID):** these are designed to closely involve the non-academic sector in doctoral training. They must be composed of at least two independent beneficiaries established in two different MS or AC, with at least one from the non-academic sector. Researchers recruited in an EID project must spend at least 50% of their recruitment period at institutions in the non-academic sector. They must also be enrolled in a PhD programme, jointly supervised by an academic and a non-academic organisation.
- **European Joint Doctorates (EJD):** these have the objective of promoting international, inter-sectoral and multi/inter-disciplinary collaboration in doctoral-level training in Europe through the creation and delivery of joint doctoral programmes. EJD fellows must receive joint supervision and be enrolled in such a programme leading to joint, double or multiple doctoral degrees.

[1] This document is provided for information purposes only and is not intended to replace consultation of any applicable legal sources. Neither the European Commission nor the Research Executive Agency (or any person acting on their behalf) can be held responsible for the use made of this information note.
[2] http://ec.europa.eu/assets/eac/msca/documents/documentation/publications/msca-fellows-information-package_en.pdf
[3] http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cpart/h2020-hi-list-ac_en.pdf

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Links

Documents/Info

- **European IPR Helpdesk**

https://www.iprhelpdesk.eu/

- **Dissemination & Exploitation of results**

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/dissemination-of-results_en.htm

- **Open access & Data Management**

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/open-access-data-management/open-access_en.htm

- **Annotated Model Grant Agreement**

http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/amga/h2020-amga_en.pdf

Thank you !

Questions ?

➢ Progress report too long (however of good quality).

➢ Personal Career Development Plans: should be visible the consensus of the ESR and supervisor.

➢ Clarifications based on current RDs status.

➢ Training entries should report on network-wide training activities.

➢ Make sure that project website is up-to-date with latest project developments: https://easitrain.web.cern.ch/

➢ Reminder on publishable summary.

➢ Ethics deliverable: clear reference on the applicable ethics rules under H2020 (article 19 Regulation (EU) No 1291/2013 of the European Parliament and of the Council of 11 December 2013 establishing Horizon 2020.

Researcher Declaration

Project's Researcher Library

Fellow Id	First Name	Last Name	Gender	Birthday	Nationality	Submitted Declarations	Actions
1	Mattia	Ortino	Male	17-07-1990	IT	1 of 1	
2	Alice	Moros	Female	06-09-1992	IT	1 of 1	
3	Linn	Kretzschmar	Female	08-07-1988	DE	1 of 1	
4	Stewart	Leith	Male	04-12-1989	ZA	1 of 1	
5	Maxime	Podeur	Male	21-06-1993	FR	1 of 1	
6	Vanessa Andreina	Garcia Diaz	Female	29-10-1991	VE	1 of 1	
7	Dorothea	Fonnesu	Female	03-11-1985	IT	1 of 1	
8	Sofiya	Savelyeva	Female	10-09-1993	RU	1 of 1	
9	Jakub	Tkaczuk	Male	17-01-1989	PL	1 of 1	
10	Jean-Francois	Croteau	Male	13-11-1994	CA	1 of 1	
11	Johannes	Onilsen	Male	15-05-1991	AT	1 of 1	
12	Dmitry	Tikhonov	Male	14-01-1990	RU	1 of 1	
13	Andrea	Vitrano	Male	14-08-1991	IT	1 of 1	
14	Aisha	Saba	Female	25-03-1992	PK	1 of 1	
15	Mattia	Donato	Male	23-01-1986	IT	1 of 1	

Researcher Declaration

No	Fellow Id	First Name	Last Name	Status	Recruitment Organisation	Start Date	End Date	Working Time Commitment	Duration	Actions
1	1	Mattia	Ortino	SUBMITTED	Technische Universitaet Wien	01-10-2017	30-09-2020	Full Time	36	↩
2	2	Alice	Moros	SUBMITTED	Technische Universitaet Wien	15-11-2017	14-11-2020	Full Time	36	↩
3	3	Linn	Kretzschmar	SUBMITTED	Wirtschaftsuniversitat Wien	15-12-2017	14-12-2020	Full Time	36	↩
4	4	Stewart	Leith	SUBMITTED	Universitaet Siegen	01-02-2018	31-01-2021	Full Time	36	↩
5	5	Maxime	Podeur	SUBMITTED	Universitaet Stuttgart	08-01-2018	07-01-2021	Full Time	36	↩
6	6	Vanessa Andreina	Garcia Diaz	SUBMITTED	Istituto Nazionale Di Fisica Nucleare	01-02-2018	31-01-2021	Full Time	36	↩
7	7	Dorothea	Fonnesu	SUBMITTED	European Organization For Nuclear Research	01-02-2018	31-01-2021	Full Time	36	↩
8	8	Sofiya	Savelyeva	SUBMITTED	Technische Universitaet Dresden	01-02-2018	31-01-2021	Full Time	36	↩
9	10	Jean-Francois	Croteau	SUBMITTED	I-cube Research	01-03-2018	28-02-2021	Full Time	36	↩
10	9	Jakub	Tkaczuk	SUBMITTED	Commissariat A L Energie Atomique Et Aux Energies Alternatives	01-03-2018	28-02-2021	Full Time	36	↩
11	11	Johannes	Onilsen	SUBMITTED	Bruker Hts Gmbh	01-01-2018	31-12-2020	Full Time	36	↩
12	12	Dmitry	Tikhonov	SUBMITTED	Helmholtz-zentrum Berlin Fur Materialien Und Energie Gmbh	01-03-2018	28-02-2021	Full Time	36	↩
13	13	Andrea	Vitrano	SUBMITTED	Commissariat A L Energie Atomique Et Aux Energies Alternatives	12-03-2018	11-03-2021	Full Time	36	↩
14	14	Aisha	Saba	SUBMITTED	Consiglio Nazionale Delle Ricerche	24-04-2018	23-04-2021	Full Time	36	↩
15	15	Mattia	Donato	SUBMITTED	Columbus Superconductors Srl	01-06-2018	31-05-2019	Full Time	12	↩

Project Secondment Periods

No	Fellow Id	First Name	Last Name	Sending Organisation	Sector of Sending Org.	Sending Country	Secondment Organisation	Sector of Sec. Org.	Secondment Country	Start Date	End Date	Working Time Commitment	Working Time Perc.	Duration	Actions
1	2	Alice	Moros	Technische Universitaet Wien	Academic	AT- Austria	Columbus Superconductors Srl	Non-Academic	IT- Italy	03-06-2019	16-06-2019	Full Time	100 %	0.47	
2	12	Dmitry	Tikhonov	Helmholtz-zentrum Berlin Fur Materialien Und Energie Gmbh	Academic	DE- Germany	Research Instruments	Non-Academic	DE- Germany	15-10-2018	19-10-2018	Full Time	100 %	0.17	
3	4	Stewart	Leith	Universitaet Siegen	Academic	DE- Germany	CemeCon AG	Non-Academic	DE- Germany	15-02-2019	01-03-2019	Full Time	100 %	0.5	
4	7	Dorothea	Fonnesu	European Organization For Nuclear Research	Academic	CH- Switzerland	Istituto Nazionale Di Fisica Nucleare	Academic	IT- Italy	07-10-2018	20-10-2018	Full Time	100 %	0.47	

Validate

Network-wide Training Activities

	Organiser Name	Organiser Sector	Training Module Title	Skills/Knowledge Acquired	Duration (days)	ETCS Points (if applicable)	Number of Early Stage Researchers	Number of External Trainees
1	EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH	Academic	Safety training	Other	2.00		12	0
2	EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH	Academic	SHAREPOINT	Other	1.00		13	0
3	EUROPEAN ORGANIZATION FOR NUCLEAR RESEARCH	Academic	Zenodo open science platform use for publications	Scientific communication (e.g. oral presentation, publication)	0.25		13	0
4	enable2change	Academic	Project Management	Project management	4.00	2.00	13	0
5	COLUMBUS SUPERCONDUCTORS SRL	Non-Academic	General and high specific risks	Other	2.00		1	2
6	COLUMBUS SUPERCONDUCTORS SRL	Non-Academic	Privacy-Security awareness	Other	1.00		1	2
7	UNIVERSITAET SIEGEN	Academic	German language course	Language course	40.00		1	15
8	UNIVERSITAET SIEGEN	Academic	Safety training	Other	1.00		1	0
9	TECHNISCHE UNIVERSITAET WIEN	Academic	EASI /ESAS summer school on applied superconductivity	General knowledge in a research field, Technical research skills	5.00	2.00	15	28
10	COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERN	Academic	CEA Welcome meeting	Other	0.50		2	0
11	COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERN	Academic	French language class	Language course	1.00		1	0
12	COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERN	Academic	Cryogenic safety class	Other	1.00		2	0
13	COMMISSARIAT A L ENERGIE ATOMIQUE ET AUX ENERGIES ALTERN	Academic	General safety class	Other	0.50		2	0
14	I-CUBE RESEARCH	Non-Academic	Laser safety training	Other	1.00		1	5
15	I-CUBE RESEARCH	Non-Academic	Chemical safety course	Other	2.00		1	6
16	I-CUBE RESEARCH	Non-Academic	LS-Dyna Training	General knowledge in a research field	2.00		1	3
17	I-CUBE RESEARCH	Non-Academic	Electrical habilitation training	Other	3.00		1	5
18	I-CUBE RESEARCH	Non-Academic	I-Cube Introduction Training	Technical research skills	1.50		1	5

EVENTS

UPCOMING EVENTS

5th-23rd March 2018
EASITrain lectures at CERN

8th-13th April 2018
FCC week 2018 Amsterdam

September 2018
EASIschool in Vienna

PAST EVENTS

5th-6th September 2017
EASITrain Kick Off meeting

22nd-24th September 2017
Superconductor Hackathon

17th-21th September 2017
EUCAS2017

17th Novermber 2017
Celebrate Marie Skłodowska Curie's 150th birthday