



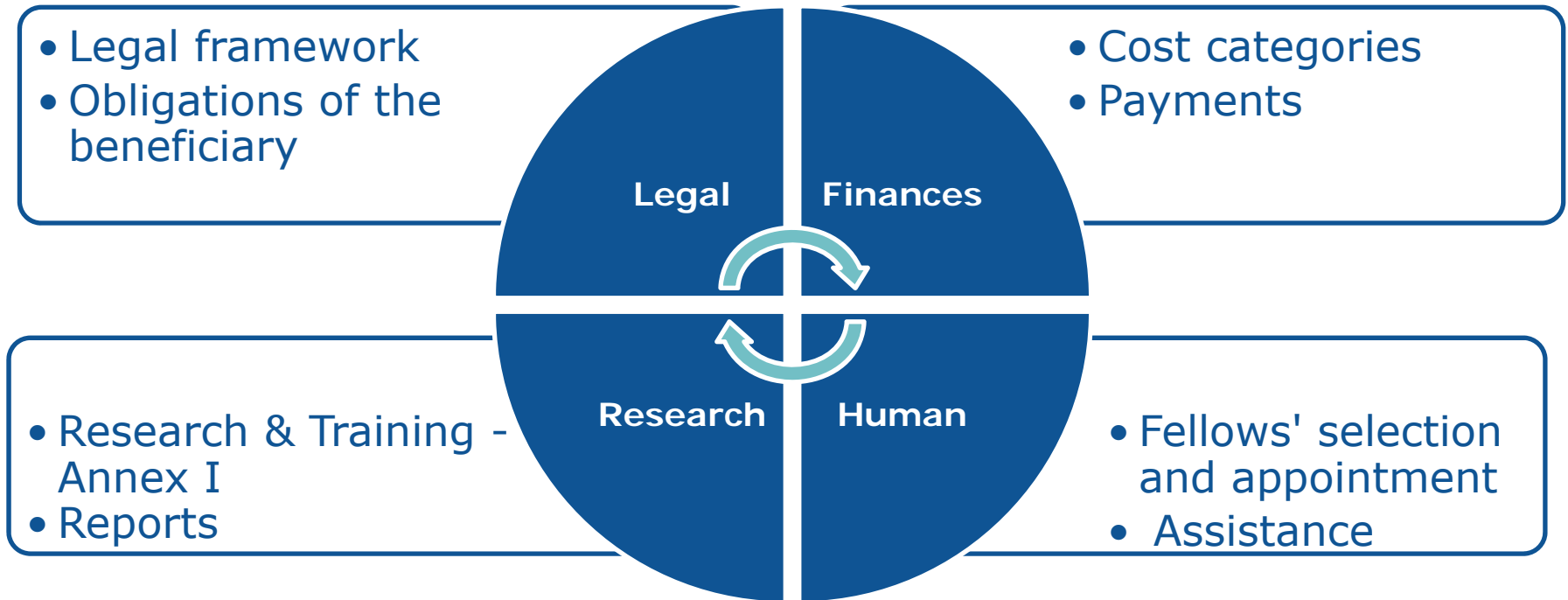
Initial training Networks
Marie Curie ITN Action

ForSEADiscovery

Forest resources for Iberian
Empires: Ecology and Globalization
in the Age of Discovery

Cathy Souto Enriquez
Project Officer
Research Executive Agency –
European Commission

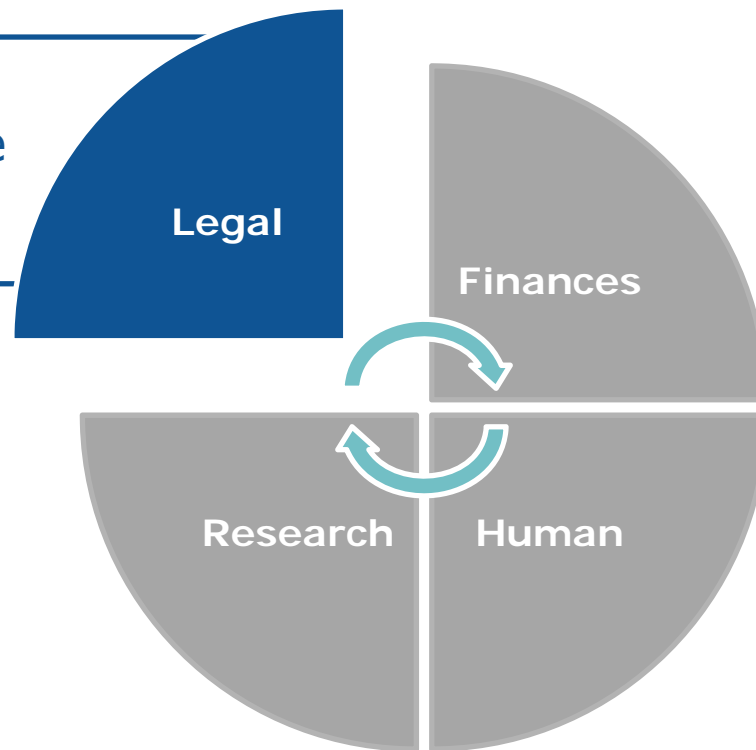
The "4" elements



Content of the presentation



- Legal framework
- Obligations of the beneficiary and consortium





Core Grant Agreement

+

Annexes:

- I. Technical Annex - Description of work
- II. General conditions
- III. Specific provisions for ITN (multi-ITN, EID, IDP version)
- IV. Form A: accession to the grant agreement (multi)
- V. Form B: request for accession of a new beneficiary (multi)
- VI. Form C: Financial statement
- VII. Form D: ToR for the CFS; Form E: ToR for the certificate on methodology

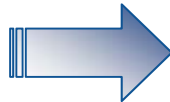
Core Grant Agreement



Name of beneficiary	CONSEJO SUPERIOR DE INVESTIGACIONES CIENTIFICAS
Start date & Duration	01/02/2014 & 48 months
Reporting periods	2 periods (M1-24 and M25-48)
Maximum EU contribution	3,904,166,69 Euro
Pre-financing & Guarantee Fund	2,537,708,35 Euro & 195,208,33 Euro
<i>Bank Account</i>	
<i>Special clauses 5bis (Mid term review meeting) + ethics (special clause 13+15)</i>	
<i>Communication addresses (Ana Maria de la Fuente)</i>	

Copy to be given to all PIs and recruited fellows

Annex I: Description of work



- Unique for each project
- Description of recruitment planning, training, milestones and deliverables
- Set-out the activities for 4 years
- For any modification, **please contact your PO**

All reports (Progress, Periodic, Mid-Term, Final) will be assessed with respect to Annex I

Copy to be given to the beneficiaries and the recruited fellows

Annex II : General Conditions



Common to all Marie Curie Actions Different for Mono-Beneficiary and Multi-beneficiaries projects

Annex II	
"ANNEE II"	
GENERAL CONDITIONS	
MARIE CURIE ACTIONS (MULTI-BENEFICIARY)	
01.1. Objectives	1
Part A: IMPLEMENTATION OF THE PROJECT	4
SECTION 1 - GENERAL PRINCIPLES	4
01.2. Organisation of the consortium and role of coordinator	4
01.3. Specific performance obligations of each beneficiary	5
SECTION 2 - REPORTING OBLIGATIONS	7
01.4. Reports and deliverables	7
01.5. Approval of reports and deliverables, non-fund for payments	8
01.6. Payment modalities	11
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01.7. Subcontracting	12
01.8. Suspension of the project	13
01.9. Confidentiality	14
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01.17. The Essential association of the Project	21
01.18. Income granted by per financing provided by the EC	21

Definitions

Part A: Implementation of the project

- Organisation of the consortium
- Role of coordinator
- Performance obligation of each beneficiary
- Reporting
- Subcontracting
- Suspension
- Reports, Deliverables
- Confidentiality, Publicity

Part B: Financial provisions

- Eligible costs, interests, receipts
- Guarantee fund
- Audits, financial penalties

Part C: Intellectual Property Rights, use and dissemination

- Foreground
- Access Rights

Final Provisions

- Amendments
- Termination

Copy to be given to the beneficiaries and the recruited fellows

Annex III : Specific Provisions for ITN



Specific for ITNs – be sure you use the right annex (version 2013) !

Definitions

Part A: Implementation of the project

- Performance obligations
- Selection of researchers
- Beneficiary's relationship with the researcher
- Reports and deliverables
- Confidentiality, Publicity

Part B: Financial Provisions

- Eligible costs

Part C: Intellectual Property Rights

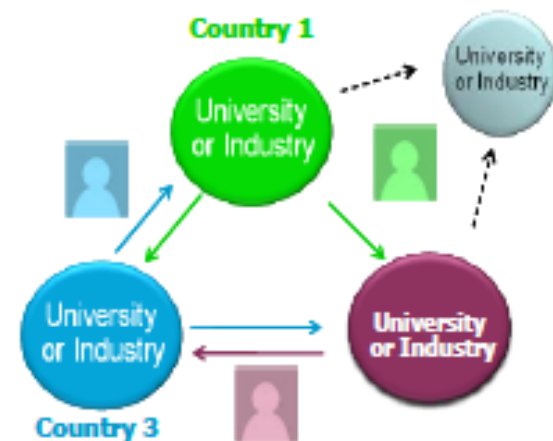
- Access Rights



Copy to be given to the beneficiaries and the recruited fellows

Requirements:

- All beneficiaries must recruit at least 1 researcher.
- Maximum of **500 researcher months**.
- Minimum of **80%** of researcher months for **ESRs**.
- Maximum **40% of total budget to one country**.
- **Secondment duration: maximum 30% fellowship duration** (11 months) Only between beneficiaries and associated partners – not outside the consortium
- **Early Stage Researchers (ESRs) appointment:**
Minimum of 3 months and maximum of 36 months.
They will typically be enrolled in a doctoral programme.
- **Experienced Researchers (ERs) appointment:**
Minimum of 3 months and maximum of 24 months.



Amendments to the Grant Agreement



A heavy legal procedure...

... to be avoided as much as possible !

Formal amendment:

- Change of Bank details
- Change of contact details

Notification:

- Change of authorised representatives

Should always be discussed with the PO in advance!

"Guide for Amendments in FP7" available on Marie Curie website



Article 11.2 of Annex II

- Intermediary for any communication between REA and the beneficiaries
- Administration and distribution of financial contribution of the EU
- Keep records and financial accounts
- Inform the REA of the distribution of the financial contribution
- Review reports to verify consistency before transmitting them to the REA
- Monitor compliance by beneficiaries with the GA

**CORE COORDINATION TASKS
CANNOT BE SUBCONTRACTED**

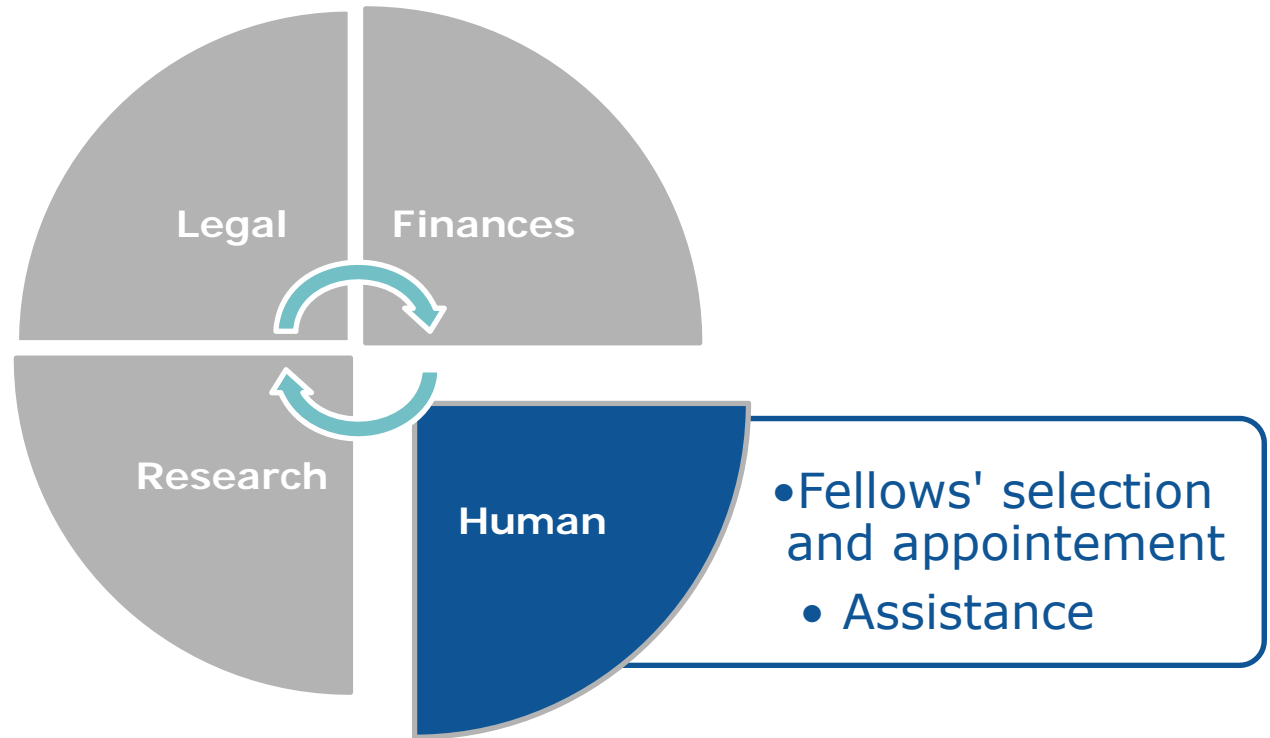
Obligations of the Network



- Carry out the work as identified in **Annex I** (efficiently and timely)
- Select fellows according to **eligibility criteria**, conclude employment contracts
- Execute, by due dates, all **payments to the researcher** (respecting Marie Curie rates)
- Provide **all needed infrastructures & conditions** for the successful completion of the project
- Inform all **fellows about their rights and obligations** as Marie Curie fellow as well as on project content
- Provide **reasonable assistance to the fellows** in all administrative procedures
- Provide information to REA and Court of Auditors (up to 5 years after the project completion)



Content of the presentation



Recruitment policy and process



The researchers to be recruited may be nationals of any country

Early-stage researchers (ESR) :

Less than 4 years experience in research (full-time equivalent) after the degree that gives access to doctoral training

Experienced researchers (ER) :

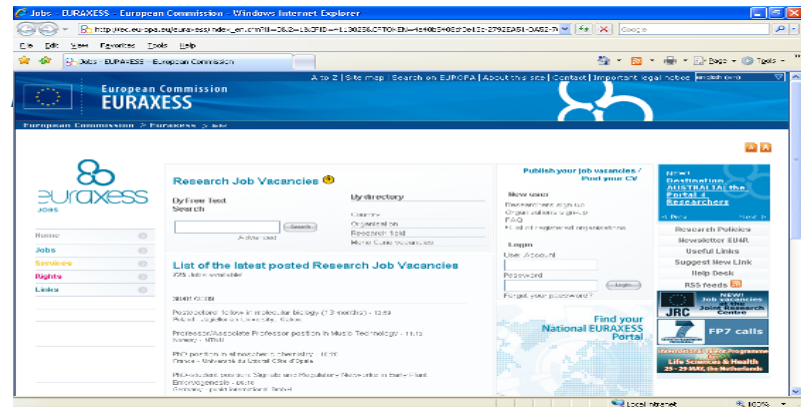
PhD or more than 4 years full time research experience BUT (only for ITN) maximum 5 years of full time research experience at the moment of the recruitment

Mobility rule:

The researcher must not have resided or carried out his/her main activity (work, studies, etc) in the country of his/her host organisation for more than 12 months in the 3 years immediately prior to his/her recruitment. Short stays, such as holidays, are not taken into account.

Recruitment based on "Transparent, Impartial, (see also Annex III.3.4)

- *Publication of vacancies*
- *Recruitment criteria*
- *Equal opportunities*





- **Contract type**

Employment contract (Type A contract)

- **Full time dedication**

Researcher must **devote him/herself full-time** to the project

- **Recruitment duration**

Recruitment period = **min. 3 months** and **max.36 months** (full-time eq.)

Best practice for the recruitment process

- 1) Establish a good strategy in advance to attract and select best candidates
- 2) Advertise widely and timely



Publish your vacancies on Euraxess – link to relevant Job databases

Jobs - EURAXESS - European Commission - Windows Internet Explorer

http://ec.europa.eu/euraxess/index.cfm/jobs/usefulLinks

Jobs - EURAXESS - European Commission

EURAXESS Researchers in Motion

European commission > Euraxess > Jobs > Useful Links

JOBS SERVICES RIGHTS LINKS

Login / Register To post your advert or CV

Useful links

Cooperation Announcement

EURAXESS Jobs, the virtual platform where job offer and demand meet, is pleased to include links to any job platforms, portals or databases providing relevant information on job opportunities for professional researchers. As such, EURAXESS Jobs is willing to cooperate further with any job platform that provides a free-of-charge service to researchers with a view to creating a partnership that provides a better service for them. Should you be interested, please do not hesitate to contact us at: RTD-RMP@ec.europa.eu

Destinations

Australia

The Australian Researcher's Mobility Portal: For Australians wishing to embark on international careers in research; international researchers wanting to explore opportunities in Australia; and Australian researchers returning home after having spent time overseas.
Go to website: Destination AUSTRALIA

Chile

The Chilean Researcher's Mobility Portal: For researchers wanting to explore opportunities in Chile or abroad
Go to website: Destination CHILE

Shortcuts

Destinations

Australia, Chile, Japan

EU Portals

The Marie Curie Actions, CORDIS, SINAPSE, EURODOC, EIROforum, EFDA, Plateus, Eures

Other Portals

Research Gate, MCFA, Stability Pact, FEANI, Scienceinurope.net, ELSO, EURYL, COS, ACO, YEBN

Jobs Databases

Naturejobs, EPSO, Science's next wave, Jobs.ac.uk, Almalaurea, FindAPost-Doc, Career.edu, TopResearchJobs, Portal de empleo

Research Institutes

ILL, ESO, ESRF, EMBL, ESA, CERN, IPTS

EURAXESS 10 YEARS

EURAXESS Statistics
Useful Links
Suggest New Link
Policy Library
Help Desk

EURAXESS WIDGETS
Add Job Vacancies Search to your web pages

Marie Curie Actions

Get support:
People/Marie Curie
National Contact Points

http://ec.europa.eu/euraxess/index.cfm/jobs/index

Local intranet | Protected Mode: Off

FR 14:29 31/10/2013

Declaration on the Conformity

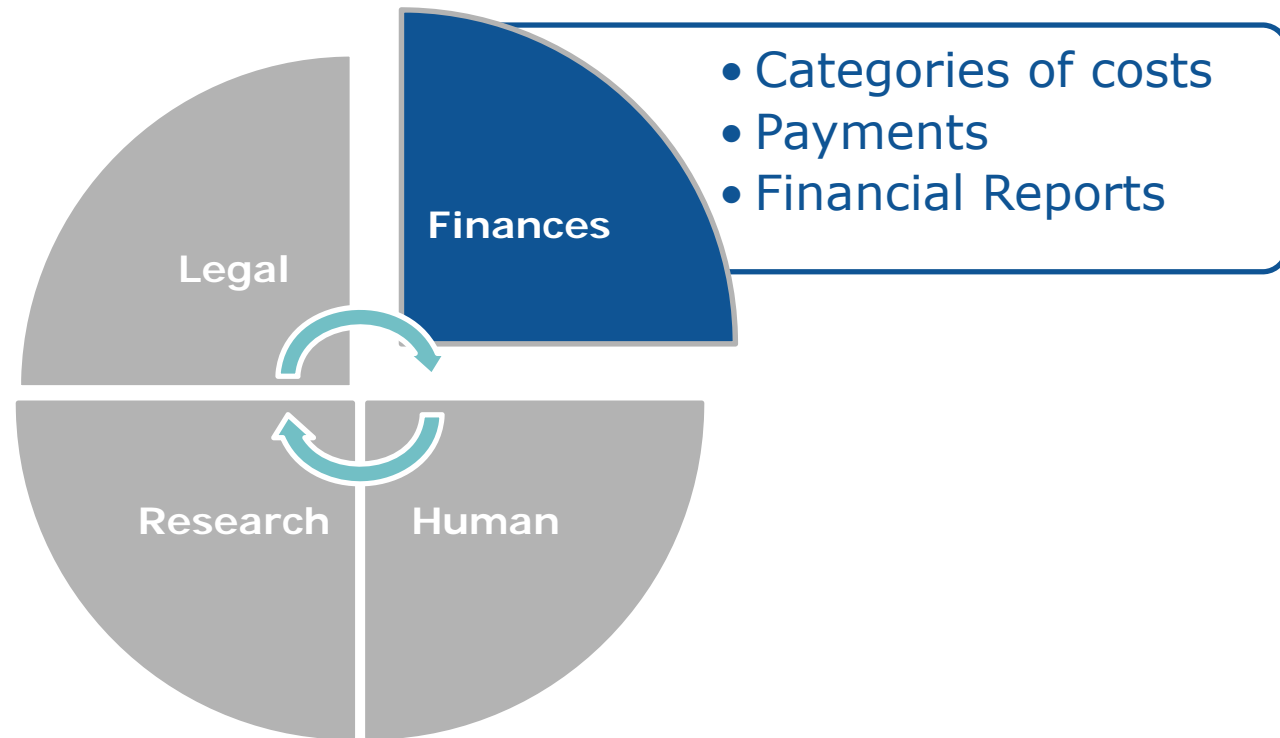


- **Contract/agreement with researcher MUST be in line with rules** (social security, duration, payments, etc.) – See Annex III
- This is certified by a Declaration on the Conformity - DoC
- **One DoC per recruited researcher and institution**
- DoC to be submitted within 20 days of appointment

DoC must be duly signed by both researcher & host institution:

- Hard copies should be kept by the host institution
- Electronic submission via the Participant Portal (PP)

Content of the presentation



Costs categories



1. FELLOW

Cost **Category 1** → Living allowance (salary)

Cost **Category 2** → Mobility allowance

2. PROJECT

Research, training and networking

Cost **Category 3** →

Contribution to networking costs, training, consumables, events, etc.

3. INSTITUTION

Management

Cost **Category 4** →

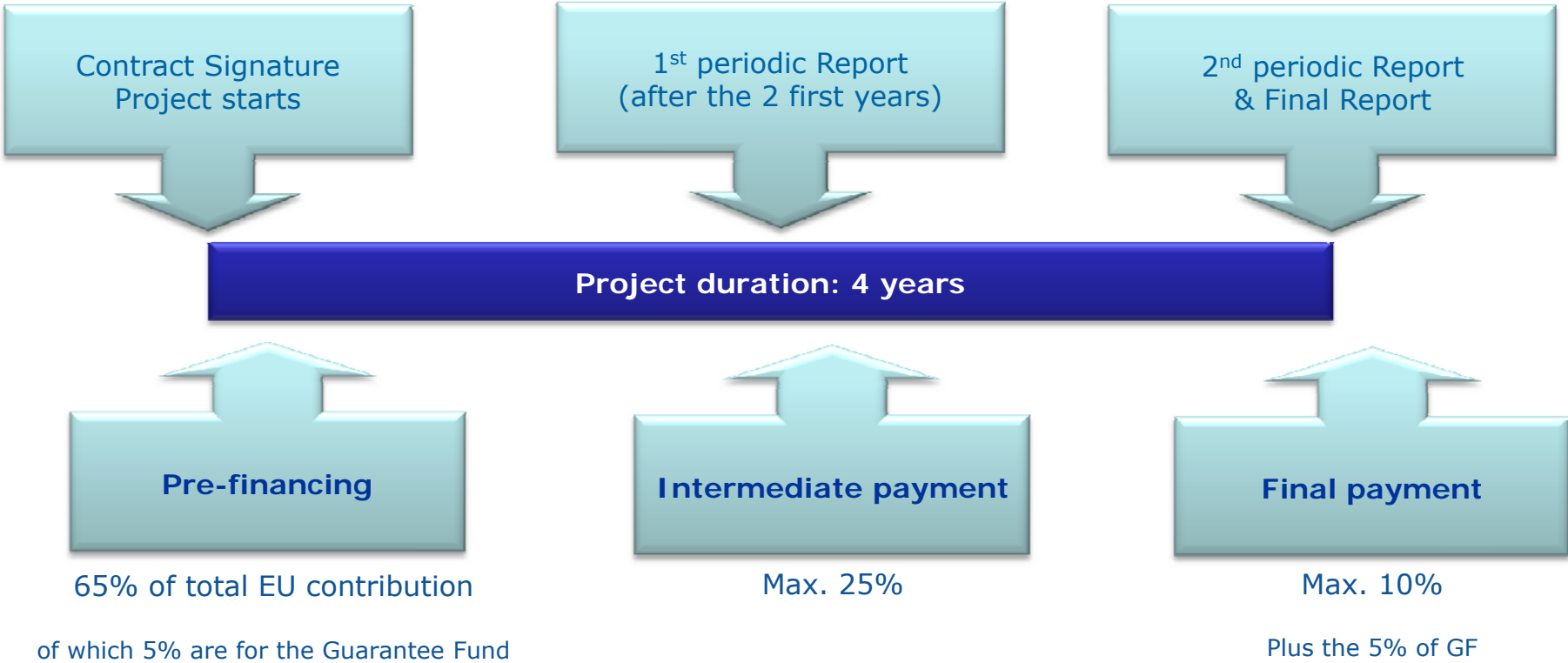
Costs associated with the ITN project management requirements

Overheads

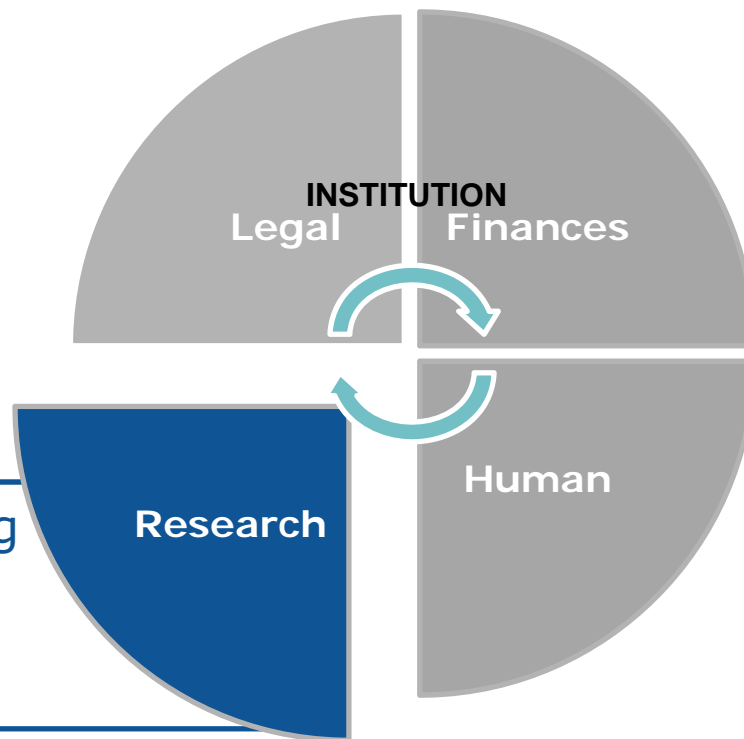
Cost **Category 5** → Indirect costs



Reporting and finances - Summary



Content of the presentation



- Research & Training
- Annex I
- Reporting





Progress report

When?

within 30 days after 12 & 36 months of project
NO financial report required

What?

Contract deliverables update
Progress of the work – research projects and training
Ethics documents/approvals if applicable

- Pre-filled general part with some editable fields
- Free text sections
- Attachments
- Submitted electronically via the PP

Mid-term report

When?

Between month 18-22 (agreement between you and your PO)
External reviewer (possibly) accompanying REA PO

What?

Mid-term report – (updated Progress report) covering period from beginning of the project till the date of MTR (to be sent 1 months before MTR)

Draft agenda and instructions available on MC website

Mid-Term Assessment questionnaires to be filled in by all researchers via SESAM (at least 2 weeks before MTR)

- **Submitted electronically via the PP**
- **Fellows' questionnaires via SESAM**



Periodic report

When?

Period 1 (1 month - 24 month)

Period 2 (25 months - end of the project)

within 60 days after each reporting period (P1 & P2)

What?

- Declaration by coordinator
- Publishable summary**
- Overview of work progress and project objectives
- Project management with justification on incurred costs**
- Ethics documents/approvals if applicable
- Financial Statement for each participant (Form C)
- Certificate on financial statement (**CFS**)-
Applicable to each beneficiary with claimed EU contribution ≥ 375 k€

- **Periodic report and Form C submitted via the PP**

Final report

When?

Within 60 days after end of project

What?

Report covers whole project period

To be submitted together with *Periodic report for period P2, Form C & CFS*

Final report includes:

Final publishable summary report

Public part (dissemination activities, publications)

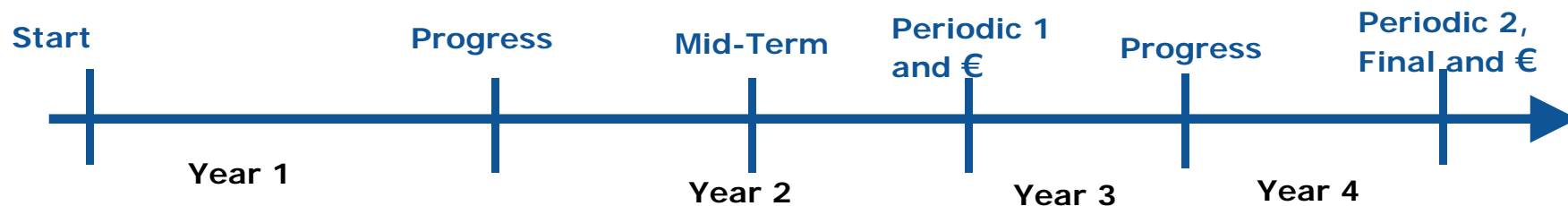
Confidential part (list of patents, trademarks, exploitable foreground)

Scientist-in-charge questionnaire

- **Submitted electronically via the PP**

Reporting summary

Report	Within 30 days after 12 months	At least 30 days before MTR	Within 60 days after 24 months	Within 30 days after 36 months	Within 60 days after 48 months
Progress	Yes	Yes		Yes	
Periodic report					
- Periodic report			Yes		Yes
- Financial Statement (Form C)			Yes		Yes
Certificates (CFS)			Yes		Yes
Final report					Yes





Researchers Questionnaires

Three types of questionnaire to be submitted by MCA-fellows to assess integration into the research & training, career progress, etc.:

- **Mid-term questionnaire**
When? At Mid-term review stage (around month 22)
- **Evaluation questionnaire**
When? At the end of appointment/employment period
- **Follow-up questionnaire**
When? 2 years after the end of appointment/employment period

How?

<https://webgate.ec.europa.eu/sesam-fp7/questurl.do>



SESAM - Questionnaire Type Selection Page - Windows Internet Explorer
https://webgate.ec.europa.eu/sesam-fp7/questurl.do
Google
SESAM - Questionnaire Type Selection Page



RESEARCH & INNOVATION

Participant Portal - Grant Management - Scientific Reporting

FP7 Home > Project Management > Select questionnaire type > ...

You are logged as:
No user logged
[Helpdesk](#)

Menu
Home
Login
Questionnaires

Select questionnaire type

Please select the type of questionnaire you wish to fill-in for your project, following the steps below:

1. In the 'Instrument' selection list, set the instrument of your project.
2. In the 'Project type' selection list, set the type of your project.
3. In the 'Questionnaire type' selection list, select the type of questionnaire you wish to fill-in.
4. Click the button 'Edit Questionnaire' to proceed.

Instrument: MC-Support for training and career development of researchers (Marie Curie) ▾

Project type: MC-ITN-Networks for Initial Training (ITN) ▾

Questionnaire type: ▾
.....
Evaluation Questionnaire
Follow-up Questionnaire
Mid-Term Assessment Questionnaire

What is FP7? : FP7 step by step : Find a Call : Get Support : Find a Partner : Find a Document : Prepare & submit a proposal : What's New?

QUEST version 8.8.5.13 in PRODUCTION environment

For all reports

Electronic submission via PP

The minimum...not enough

- Persons-months “deliverables” update
- Progress of the work – research projects and training
- Limit to rigid PP report format

The usual...

- Synthesis of achievements & future work (deviations)
- **Use attachments – real technical report**

The ideal...

- Analysis and go-beyond

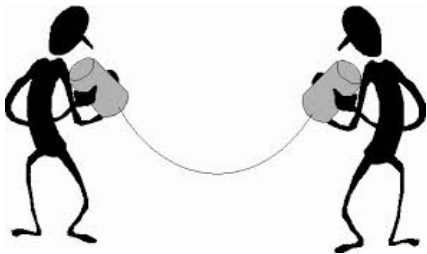
- Your PO reader likes concise, illustrated and substantiated information

- Communicate to your PO the serious issues immediately, don't wait for the next report...

Best practices :



A constructive dialogue with your Project Officer



- Role of the Project Officer
- Communicating on project success... but also on major concerns & challenges
- Bring and discuss well in advance all questions and difficulties related to project implementation
- Distinguish issues related to internal arrangements (IPR, consortium agreement, etc.)

Why?

- Valuable source of feedback
- Find appropriate solutions together

Sitemap | Legal notice | Contact | Search | English (en)



RESEARCH & INNOVATION

Marie Curie Actions

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- How to manage my project
- Publish your Marie Curie Actions funded job vacancies
- Statistics
- MCA funded projects



NEWFELPRO, the 100th COFUND Fellowship Programme goes to CROATIA! - Congratulations! [Read more](#)

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- FP7-PEOPLE-2013-IAPP
Deadline:16/01/2013
- FP7-PEOPLE-2013-IRSES
Deadline:17/01/2013
- FP7-PEOPLE-2013-CIG
Deadline:18/09/2013

[See all open calls](#)

Marie Curie Actions - Research Fellowship Programme

Marie Curie Fellowships are European research grants available to researchers regardless of their nationality and field of research. In addition to generous fellowships, researchers have the possibility to gain experience abroad and in the private sector, and to complete their training with competences or disciplines useful for their careers. In this website you will learn more about those grants that promote excellence and innovation in Europe.

- [Discover more about Marie Curie Actions fellowships](#)
- [Check the open calls available for you](#)
- [Find the latest jobs and traineeship opportunities](#)



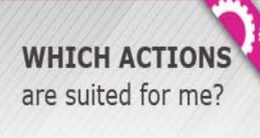
Participant portal



Solutions for researchers
Attractive research careers and services in Europe
euraxess
RESEARCHERS IN MOTION



JOB VACANCIES
for you



WHICH ACTIONS
are suited for me?



MARIE CURIE ALUMNI

Initial Training Networks (ITN)

Marie Curie Actions fellowships - How to manage my project - ITN

- General advice
- Grant agreement negotiation
- Project management**

Your Marie Curie Grant Agreement is managed by the Research Executive Agency (REA). For more information on REA please visit the [website](#).

Guide for Applicants

- The Guide for Applicants contains the essential information to guide you through the process of preparing and submitting a proposal, but also on how to implement your project. Work programmes and hence also the Guides for Applicants are revised each year, so make sure you refer to the guide for the call under which your project was funded. These documents are available from the [Call pages](#).

Reporting & General Project Management

- [Marie Curie Actions Financial Guidelines 2007-2010 Work Programmes](#) (427 KB)
- [Marie Curie Actions Financial Guidelines 2011-2012 Work Programmes](#) (422 KB)
- [Marie Curie Actions Financial Guidelines - Frequently Asked Questions](#) (193 KB)
- [Coordinators briefings September 2012](#) (7 MB)
- [Eligibility of Tuition Fees in Marie Curie Action Cost Statements in FP7](#) (222 KB)
- [Guidance Notes on Project Reporting for ITN Projects](#) (220 KB)
- [Participant Portal](#)
- [Researchers Questionnaires](#)
- [Guide to Financial Issues relating to FP7 Indirect Actions](#) (779 KB)
- [IPR Helpdesk](#)
- [Amendment Guide for FP7 Grant Agreements](#) (271 KB)
- [ITN Mid-Term Review Guidelines](#) (113 KB)
- [Contact persons for ITN projects](#) (79 KB)

Recruiting Researchers

- [Publish a vacancy](#)
- [Submit a Declaration of Conformity via Sesam](#)
- [The European Charter for Researchers & The Code of Conduct for the Recruitment of Researchers](#)

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Open calls

- [FP7-PEOPLE-2013-IRSES](#)
Deadline:17/01/2013
- [FP7-PEOPLE-2013-IEF](#)
Deadline:14/08/2013
- [FP7-PEOPLE-2013-IOF](#)
Deadline:14/08/2013
- [FP7-PEOPLE-2013-IIF](#)
Deadline:14/08/2013

[See all open calls](#)

Latest jobs opportunities

[PhD Thesis Student \(m/f\), Subject: Membrane Protein Nano-diffraction and Serial Crystallography, ref. EUCFR205](#)
Join the ESRF to develop nano-beam serial crystallography techniques applied to membrane proteins.
[ESR Position DREAMS-ITN:](#)



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FAQ

about Marie Curie Actions

Enquiry service

If you can't find an answer to your questions in the FAQ service, please submit it to the Enquiry Service.

MARIE CURIE ACTIONS

National Contact Point service

Choose a country

PRESS

Marie Curie Actions program is managed by Education and Culture DG of the European Commission (our Commissioner: [Androulla Vassiliou](#)).

If you are a journalist, please get in touch with our spokesperson, Dennis Abbott on: dennis.abbott@ec.europa.eu or (+32-2) 295 92 58.

You can also contact European Commission [press officer in your country](#).

FP7 contacts

in third countries

Choose a country

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- ### Open calls
- [FP7-PEOPLE-2013-NIGHT](#)
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 - [FP7-PEOPLE-2013-IAPP](#)
Deadline:16/01/2013
 - [FP7-PEOPLE-2013-IRSES](#)
Deadline:17/01/2013
 - [FP7-PEOPLE-2013-IOF](#)
Deadline:14/08/2013

[See all open calls](#)

Latest jobs opportunities

[PhD Thesis Student \(m/f\), Subject: Membrane Protein Nano-diffraction and Serial Crystallography, ref. EUCFR205](#)
Join the ESRF to develop nano-beam serial crystallography techniques applied to membrane proteins.

[ESR Position DREAMS-JTN: Dereverberation by inverse solution of the acoustic wave equation on a finite element grid](#)



It's a contractual obligation Article 7 (Special Clause 5bis)

A dialogue between the consortium and the REA on the project status and implementation, future plans, etc...

To be organised between month 20-22, preferably

- To help **solving** any problematic issues
- To **prepare** for the Periodic Report

Date to be agreed with PO well in advance!

- *An external expert may be present*
- *Guide for MTR with draft template agenda on MCA website*



European
Commission

Useful links:

EURAXESS

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

CORDIS

http://cordis.europa.eu/fp7/home_en.html

RTD

<http://ec.europa.eu/research/index.cfm>

REA

http://ec.europa.eu/rea/index_en.htm

**Thank you very much
for your attention!**

**Cathy.souto.enriquez@ec.europa.
eu**

