**Document Delta**

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**by November 29th, 2016 at 1PM Paris time.**

**It is to be written in English following the template herein.**

**Warning - admissibility requirements[[1]](#footnote-1)**

This document will contain **78,600 characters** at the most (**including spaces**, 12-point Courier character font, single line spacing), including cover page and table of contents, excluding tables contained in the proposed template. It must be provided in two versions: one in Word format with the count of characters (to be provided in a dedicated cell below), and one in Pdf format.

Useful guidance are given at the beginning of each part. They are to be removed before submission. It will then be necessary to update the table of contents as well as the list of tables.

**Important**

The document uploaded to the submission site must follow the template provided herein, supplemented by the texts of the project principal investigator, in strict compliance with the document structure (parts, sections, paragraphs, titles, etc.). **This structure must not be modified. The same goes for the table row and column headings.**

**Customised presentations and graphical additions are not allowed.**

**Definitions**

The text frequently refers to two documents:

* the ***reference file***, which is the last application file submitted by the project principal investigator (PI) and available to the jury: that of preselection for preselected applicants during the second wave and that of selection for the preselected applicants during the first wave.
* the ***amended project***, which is the project presentation document for the selection.

The jury’s ***evaluation summary*** which is here concerned is the one associated with the reference file.

|  |  |
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| Count of characters | Following the rules presented above. |

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# First part – Responses to the jury’s opinion of the project

To facilitate the reading of this section by the jury, each response must clearly indicate the addressed question, whether in the evaluation summary or during the hearings. For comments in response to "C" ratings, the concerned criterion must be recalled.

## Responses to the questions, remarks and recommendations of the jury

This first section is mandatory. It must enable the project Principal Investigator (PI) to respond to all the remarks and recommendations explicitly expressed by the jury in the evaluation summary (heading "*Main negative points of the project*" and/or, where applicable, at the beginning of the heading "*Areas for improvement - necessary amendments*) and/or during the hearing.

If answers to questions specific to the project are covered by information provided by the writer in the second part of this document, then he/she should avoid repetition by making appropriate cross-references.

##  Comments on the weaknesses indicated by the "C" ratings

This second section is optional and complementary to the first section. The PI may provide any information or observations deemed appropriate concerning the weak points indicated in the evaluation summary by a C rating associated with some of the 12 criteria without remarks being formulated in the section "*Main negative points of the project"*.

As in the previous section, if some answers to questions specific to the project is covered by information provided by the writer in the second part of this document, then he should avoid repetition by making appropriate cross-references.

# Second part - responses to requests addressed to all project leaders

In accordance with the demands of the Jury, the aim of this part is to supplement or modify certain points of the reference file. The corresponding text, written here, must be taken up word for word in the amended project. The jury asks more specifically that the project's 4-year and 10-year targets be indicated with regard to evaluation criteria numbers 2, 4, 5, 6, 8, 11 and 12 listed in paragraph 3.3.2 of the call for projects text, with an analysis of the risks involved.

This second part is organized into 10 sections. Details on the expectations of the Jury relative to the themes corresponding to the above-mentioned criteria are provided as comments in the sections and paragraphs.

In this part, the project PI will provide several characteristics of the "Target University". This must be understood as being the competitive higher education and research establishment to which the trajectory leads and which brings together, in an internationally visible manner, the site research and course strengths.

## Structure of the group

Do not write anything in this section if there has been no change in the composition of the consortium as described at the beginning of the reference file. In the contrary, this section must be copied in order to replace the original version in the amended project.

List of consortium members who are stakeholders (partners) in the Initiative (other than the PI)

|  |  |  |
| --- | --- | --- |
| **Higher education and research establishments** | **Research organisations** | **Others** |
|  |  |  |
|  |  |  |

List of partners external[[2]](#footnote-2) to the consortium leading the Initiative

|  |  |  |
| --- | --- | --- |
| **Higher education and research establishments and research organisations** | **Socio-economic players[[3]](#footnote-3)** | **Others[[4]](#footnote-4)** |
|  |  |  |
|  |  |  |

With respect to the reference file,

* members and/or external partners added
	+
	+
* members and/or external partners removed
	+
	+

## Selected PIA (Investments of the Future) projects

This section is related to paragraph 1.2 of the reference file and replaces it.

The considered projects are only those which are funded under PIA 1 or PIA2 (LABEX, IDEFI, EQUIPEX, IDEFI-N, IHU, RHU, Convergences Lab, IRT, ITE, Health and biotechnologies, SATT, Carnot IA ...).

One distinguishes two categories:

* the intra projects managed by the Initiative or at least one of its members;
* the extra projects which are managed neither by the initiative nor by one of its members, but in which at least one of these is a partner.

For items 1 and 2, only intra projects are taken into account.

#### Selected LABEX managed by the Initiative

LABEX managed by the Initiative

|  |  |
| --- | --- |
| **Project acronym** | **Project summary (80 signs) or key words describing it** |
|  |  |

#### Selected IDEFI managed by the Initiative

IDEFI managed by the Initiative

|  |  |
| --- | --- |
| **Project acronym** | **Project summary (80 signs) or key words describing it** |
|  |  |

#### Projects contributing to the scientific and results exploitation policy of the Initiative

##### Intra projects, other than LABEX and IDEFI, contributing to the scientific and results exploitation Initiative’s policy

This paragraph is dedicated to the intra projects which the Initiative is at least intended to organise and put into perspective, if not to manage directly, in order to obtain an efficient and high-performing ecosystem.

Other PIA projects managed

|  |  |  |
| --- | --- | --- |
| **Call for proposals concerned** | **Project acronym** | **Project summary (80 signs) or key words describing it** |
|  |  |  |

##### Extra projects, including LABEX and IDEFI, contributing to the scientific and results exploitation Initiative’s policy

This paragraph is dedicated to the extra projects from PIA1 ans PIA2 which contribute to the ecosystem mentioned above.

Non-managed PIA projects

|  |  |  |
| --- | --- | --- |
| **Call for proposals concerned** | **Project acronym** | **Project summary (80 signs) or key words describing it** |
|  |  |  |
|  |  |  |

#### Strategic projects of the Initiative

For each project mentioned in the three items above that the Initiative considers to be key to its development, the following table must be filled out.

This table serves to describe how the Initiative uses these projects and to underline their key developmental impact.

For all the PIA1 projects that are not included in the following table, a brief explanation for the exclusion decision can be provided.

Impacts of the PIA projects

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **PIA1 projects** | **Key developmental impacts** | **Synergies with the partners external to the Initiative** | **Other contributions of the project to the Initiative** | **Any enhancement of the project potential by the Initiative** |
| Project name |  |  |  |  |

##  Strengths and Weaknesses

The text figuring in this section is to be copied at the end of section 1.3 of the amended project.

The following two points are to be addressed:

###### Strengths and weaknesses in human resource management (HRM).

In the reference file, a "strengths and weaknesses" analysis was carried out for the "Structuring, integration and governance", "Research" and "Teaching", etc. fields. Here you are asked to apply this "strengths and weaknesses" analysis to the "human resource management" field.

1. Modifications, if any

With the exception of the analysis of human resource management mentioned above, the initial analysis of the strengths and weaknesses is only to be taken up again in the following two cases if they lead to substantial changes in the project objectives:

* a new benchmark that reveals significant errors in the initial analysis;
* the requalification of an IDEX project into the I-SITE project category, or a project perimeter modification.

## Socio-economic partnerships

### Examples of partnerships

Insertion of a new paragraph "1.4 Examples of partnerships" in the amended project.

For each of the three socio-economic sectors of activity hitherto considered as playing the most important developmental role with regard to research, university courses and results capitalisation, provide a table based on the following model. This table allows one to identify in particular the financial contributions of the socio-economic partners to the activities of the consortium members.

Financial contributions of the socio-economic partners

|  |  |
| --- | --- |
| Socio-economic sector |  |
| Research themes involved |  |
| Partners | Names of the partners within this sector | Forms of partnership (framework agreement, contract, common laboratory, etc.) | Age of the partnerships |
|  |  |  |
|  |  |  |
| Example of a flagship result or achievement |  |
| Funding (including IP revenues) received from companies under these collaborations | *2012* | *2013* | *2014* | *2015* |
|  |  |  |  |

Supplement this analysis with the following table, taking into account that:

* the “share of the total funding received” corresponds to the ratio of the sum of the funding listed above (for the three main socio-economic activity sectors) to the total sum of the funding provided by the companies;
* the “share of the consolidated budget” corresponds to the ratio of the sum of the funding listed above (for the three main socio-economic activity sectors) to the total consolidated budget of the consortium partners.

Shares of contributions from the socio-economic partners

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Year | 2012 | 2013 | 2014 | 2015 |
| Share of total funding received |  |  |  |  |
| Share of consolidated budget |  |  |  |  |

### Development of the partnerships

Insertion of a new paragraph "3.7 Development of the partnerships" in the amended project.

For each of the three socio-economic sectors of activity considered as playing the most important role for the future with regard to research, courses and results capitalisation, provide a table based on the following model showing how the Initiative will structure, consolidate and extend the support from the socio-economic world in 4 years' time.

Development of the partnerships

|  |  |
| --- | --- |
| Socio-economic sector |  |
| Funding (including IP revenues) expected from companies under the "Target University" collaborations |  |
| Example of an expected flagship result |  |
| Expected 4-year growth of funding received |  |

The current situation of relations of the consortium members with the socio-economic world is, in a more comprehensive manner than in the previous three cases, a measure of the scale of the economic partnerships that it will be possible to establish. This more comprehensive analysis is provided in the following table. It is proposed in this table that the share of funding from private sources be:

* calculated on the basis of an average over the years 2014 and 2015
* totalled for all the partners in the thematic areas of excellence.

Non-recurrent funding

|  |  |  |
| --- | --- | --- |
|  | **Funding (annual average in K€)** | **Expected growth for the 4 years to come (in %)** |
| Direct research contracts with the companies |  |  |
| CIFRE theses (sum of the salaries and the support contracts) |  |  |
| Subsidised collaborative research projects[[5]](#footnote-5) (Europe, ANR, etc.) |  |  |
| Patronage |  |  |
| Others (specify) |  |  |
| **Total** |  |  |

In the same manner, draw up a table of the Initiative's flagship courses - existing and future - developed in partnership with the socio-economic sector, indicating for each one its level (L, M, D)[[6]](#footnote-6) or its "non-qualifying" (NQ) nature, the nature of the audience (CDC: conventional degree course, SC: sandwich course or apprenticeship, CL: continuous learning), and, if applicable, the current headcount and the target headcount in 4 years.

Flagship courses

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Title of the course** | **Current headcount if applicable** | **Nature of audience** | **4-year target headcount** | **Nature of audience in 4 years** | **L, M, D or NQ** |
|  |  |  |  |  |  |
|  |  |  |  |  |  |
|  |  |  |  |  |  |

##  Ambition of the Initiative

Expands upon or modifies part 2 of the reference file.

A realistic and rigorous comparison - thus well documented – must be carried out with worldwide recognized universities which will be selected because of their specific characteristics (excellence areas, specialization and visibility strategy, trajectory over several years, governance).

The file should primarily allow the jury to be provided with all the major elements characterizing the project thematic strengths in research and training, and consequently the scientific profile (IDEX or I-SITE) of the Initiative.

Regarding research, the comparison with other universities must be based on as accurate and clear an identification as possible, both in qualitative and quantitative terms, of the areas of excellence constitutive of the project, and must locate them in the international landscape to lend credibility to their potential. The project PI will specify the indicators used (number of researchers, awards, honors or funding received, publications, international cooperation, etc.), the rankings to which he usually refers, generic and thematic, and the research dynamics going on worldwide to delimitate and justify the choice of these areas of excellence. On an international basis, the project PI will argue the reality of the strengths, the potential and the specificities of the site in relation to laboratories or institutes of other international universities positioned on the same themes.

Second, the project PI will specify the project target regarding the restructuring of the local higher education and research landscape, building on an analysis also conducted at international level.

The file will usefully include a comparison with one (or more) foreign university(ies) in terms of: modes of organization and structuring, remarkable trajectory from which the Initiative would like to draw inspiration, actions to support the global dynamics, international visibility policy, human resources policy, etc. An explanation of all the lessons learned from this comparative analysis concerning these strategic aspects is expected.

The elements of this analysis shall be presented in sections 7 and 8 herein.

Two additional points are to be mentioned:

* The impetus of global excellence of the project must lead to international collaborations of a very high level in which the future "Target University" (definition p.4) will be a major player. The strategic choices in this respect shall be presented and the targeted collaborations in 4 years' and 10 years' time shall be specified.
* It should be noted that a thorough study of the various dimensions of the ambition must help to define the necessary means to achieve a given action (see below).

## Actions

Supplements or modifies paragraph 3.2 of the reference file.

The description of how these actions are implemented should live up to the challenges. Indeed, this implementation is a significant issue of the project assessment, since a measure is of little interest when its implementation is not defined, regardless of its excellence. Where applicable, for a given action, a SWOT analysis could be relevant.

1. In the area of research, describe the actions that play a key development, consolidation and reorganisation role that the Initiative intends implementing in the next 4 years.
2. In the area of university courses, describe the actions that play a key development, consolidation and reorganisation role that the Initiative intends implementing in the next 4 years.

In the following two tables, indicate the main steps taken to enhance attractiveness for French and foreign studies alike, and in terms of pedagogical innovations.

Attractiveness to students

|  |  |  |  |
| --- | --- | --- | --- |
| **Brief description of the attractiveness measure** | **Target headcount in 4 years** | **Origins of targeted students** | **Level concerned****(L or M)** |
|  |  |  |  |

Pedagogical innovations

|  |  |  |
| --- | --- | --- |
| **Brief description of the pedagogical innovation** | **Target headcount in 4 years** | **Level L or M, or distribution between levels L and M** |
|  |  |  |

1. Procedures implemented to create new activities

For the emergence of new laboratories, for the creation of flagship university courses, for opening up to international partnerships, give the criteria that must govern the setting up of the first achievements, and provide a 4-year and 10-year projection of what will be undertaken and achieved.

The information presented in this paragraph must be consistent with that provided in the "PRINCIPAL COMMITMENTS" section.

The Initiative must develop the students' feeling of belonging to the "Target University" (definition p.4) through the actions carried out, and particularly through the attractiveness policy. The responder shall endeavour to indicate:

* whether the establishment in which these students are enrolled is or will be the University, giving the time frame, and specifying whether such registration is unique or double (therefore shared with one member of the consortium);
* whether the diplomas that are delivered to them bear or will bear the seal of the University, giving the time frame and indicating whether this seal is exclusive or not.

Cases where the situation is otherwise shall be explained.

## Trajectoire

#### 1. Overall description

Supplements or modifies paragraph 3.3.1 of the reference file.

The trajectory must show how a University with high international visibility is set up and develops. Starting from the consortium formed by all the project partners, describe the emergence / the construction of the structure which, through transformations, will form the "Target University" (definition p.4) in 10 years' time.

In this trajectory, the transformations during the first 4 years shall be presented with a level of precision that allows progress to be assessed. All the progressive measures that enhance international visibility, the position of the “Target University” in international rankings, and the visibility with respect to the national and European economic world (which entity enrolls the students, which entity delivers the diplomas, which entity employs the personnel, inclusion or position in the rankings, etc.) shall be explained.

The "Target University" shall be characterised at the following three milestones: at the initial instant, at the end of the probationary period (4 years), on reaching the 10-year term.

Finally, the characterisation of the "Target University" shall include: the status of the "Target University" (the administrative title of the type of structure can suffice), its members (if there are different circles corresponding to different levels of involvement, explain them), its competences and the degree of integration of the members of the consortium leading the Initiative, its mode of governance (decision-making body with its composition, method of making decisions (majority, unanimity, etc.).

If the "Target University" is not a legal reality at the start of the Initiative, its date of creation shall be indicated. Otherwise, a proposal will be provided for the statutes of the “integrated” target university, which would allow its creation (under current law or a possible future law).

The aim here is to provide guarantees thatthe Initiative's governance is capable to steer the building of this “Target University” (see section 9).

At the initial instant, the characteristics of the structure coordinating the partners on the site and bringing together all or part of the Initiative's partner institutions must be summarised: its administrative status, its members (if there are different circles corresponding to different levels of involvement, explain them), its competences, explaining those that have been delegated to it by its members, its mode of governance (decision-making body with its principle of composition, method of making decisions (majority, unanimity, etc.). The way this structure is linked to this Initiative and its role for the "Target University" must be explained.

If this structure organising the consortium has to evolve in parallel with the "Target University" in the course of the project, its transformations must be specified. The question is thus to clarify the role of the Initiative constituent consortium in the construction of the "Target University".

The presentation of the actions of the Initiative to support these transformations must be accompanied by some information on the financial resources attributed to them, knowing that the detailed budget allocated to these various actions is to be provided in the financial tables Tab#2 available on the submission website. The construction of an integrated attractiveness policy, whether it concerns the human resources or the students, may figure more specifically in the description of the trajectory as a key element in the construction of the University, while avoiding redundancies with sections 8 and 10.

It is suggested that the PI structure this paragraph by describing in turn the initial state, the "Target University" in 4 years, the "Target University" in 10 years, and the main transformations achieved during the first 4 years then during the last 6 years.

The information presented in this paragraph must be consistent with that provided in the "PRINCIPAL COMMITMENTS" section.

#### 2. Strengths: projected development over time

Insertion of a new paragraph at the end of 3.3

In the table below, for each theme corresponding to a current or future strong point, in addition to information compiled in the Starter document, the PI will include its characteristics at the starting of the Initiative: level (position or ranking of the institution(s) concerned, nationally and internationally), number of people involved, impact in an international context, and the projected development specifying the 4 and 10 year targets.

Main themes

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Current state** | **Situation in 4 years** | **Situation in 10 years** |
| Name of the theme 1 | Level |  |  |  |
|  | Workforce involved |  |  |  |
| Impact |  |  |  |
| Name of the theme 2 | Level |  |  |  |
|  | Workforce involved |  |  |  |
| Impact |  |  |  |

## Human resources

The tables requested supplement or modify paragraph 3.5 of the reference file.

### Talent attraction policy

For each of the three procedures, i.e. recruitment of post-docs; implementation of "tenure track" actions or systems; recruitment of people with high scientific and technical potential, equally well for today as in four years' time, indicate the recruitment procedure envisaged, the nature of the contracts and the employing institution, and the remuneration and salary development policy . The aim here is to illustrate a highly active HR policy, designed to attract and constitute a pool of talent.

Career management and, where applicable, the proposed environments (means of accompanying recruitment when the position is published) shall supplement the information for the latter two categories ("tenure track" and high scientific and technical potential procedure).

Lastly, the duration of the "tenure track" procedure shall be specified.

Post-doc

|  |
| --- |
| Post-doc |
| Recruitment procedure | Current: |
| Future: |
| Type of contract (and name of employer) | Current: |
| Future: |
| Remuneration policy | Current: |
| Future: |

Tenure track

|  |
| --- |
| "Tenure track" actions or arrangements |
| Recruitment procedure | Current: |
| Future: |
| Type of contract (and name of employer) | Current: |
| Future: |
| Duration of procedure | Current: |
| Future: |
| Remuneration policy | Current: |
| Future: |
| Career management | Current: |
| Future: |
| Planned environmental measures | Current: |
| Future: |

High scientific and technical potential

|  |
| --- |
| High scientific and technical potential |
| Recruitment procedure | Current: |
| Future: |
| Type of contract (and name of employer) | Current: |
| Future: |
| Remuneration policy | Current: |
| Future: |
| Career management | Current: |
| Future: |
| Planned environmental measures | Current: |
| Future: |

### Human resources policy: definition and implementation

During the course of the project the "Target University" may undergo a change in the levels of integration of its members, particularly through the human resources policy.

Complementing paragraph 8.1 above, the human resources policy put in place by the Initiative shall specify for each stage of its development:

* which entity decides on the allocation of the jobs that come under the Initiative and what is the committee, and its characteristics, on which the Initiative bases the selection of the persons to recruit;
* what is/are the institution(s) employing personnel recruited thanks to the funds of the Initiative;
* what percentage of the employments of the Initiative member institutions is freed by them to be made available to the Initiative.

The information presented in this paragraph must be consistent with that provided in the "PRINCIPAL COMMITMENTS" section.

##  Principal commitments

Supplements or modifies paragraph 3.6 of the reference file.

In reference to the described trajectory, the PI shall complete the following table which summarises the key commitments made for the construction of a university with international visibility, and shall indicate a time frame for achieving the commitment.

Table of commitments

|  |  |  |  |
| --- | --- | --- | --- |
| Nature of commitment | Description of the indicator | Target | Date of achievement |
|  |  |  |  |
|  |  |  |  |

The PI is free to formalise these commitments of which the impact shall be assessed by the jury.

A set of indicators allowing the 10-year progress of the project to be evaluated shall be proposed whenever appropriate.

If applicable, the PI shall match the project indicators with the commitments made on account of the site contract.

## Governance, organization and management

This section supplements or modify part 4 of the reference file.

The current system of governance adopted by the site players shall enable the Initiative to be put in place. If the creation of the Initiative involves putting in place a specific system of governance, this system must be described and its relation with the preceding governance system explained.

The governance may evolve over time, depending on the achievements. For each of the stages (T0, T0 + 4 years and T0 + 10 years), describe the bodies put in place and their composition, the methods of decision-making for strategic questions as well as for daily management, the means implemented to ensure the coherence of the PIA projects as a whole, and give global impetus to actions relating to research, courses, innovation and international importance. Achievement tracking indicators put in place and associated values qualifying the statuses reached.

Without repeating the characteristics of the "Target University" set out in the section relative to the trajectory, with which this section must be fully consistent, introduce and if necessary justify the measures taken to reinforce the efficacy of the central management and the rules of subsidiarity.

In connection with the 12 criteria - specifically, criteria 2, 4, 5, 6, 8, 11 and 12 (see above introduction of the second part), and in order to have a synthetic view, the following table is to be filled out. For each competence, its status will be spotted in the appropriate cell with a cross or a U symbol or annotation “partially", given the following meanings:

Distributed = distributed among members of the Initiative

Already transferred = the structure carrying the Initiative is in charge

Transferred in \* years = U: the transfer to the "target university" will be completed in \* years;

I: the transfer to the institution leading the Initiative will be completed in \* years.

When a competence is only partially transferred, mention it by adding "partially" in the appropriate cell, keeping in mind that in the previous sections of the document the transferred parts have been clarified.

Competence assignment

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Competences | Distributed | Already transferred | Transferred in 4 years | Transferred in 10 years |
| Recruitment of permanent staff |  |  |  |  |
| Remuneration of permanent staff |  |  |  |  |
| Resource management |  |  |  |  |
| Research contracts management |  |  |  |  |
| IP management |  |  |  |  |
| Partnerships management |  |  |  |  |
| International relations |  |  |  |  |
| PhD students registration |  |  |  |  |
| Master students registration |  |  |  |  |
| Bachelor students registration |  |  |  |  |
| Students management |  |  |  |  |
| Diplomas awarding |  |  |  |  |
| Research policy |  |  |  |  |
| Doctoral schools |  |  |  |  |
| Organization of teaching and educational activities |  |  |  |  |

# Third part – Complements left to the discretion of the principal investigator

In this section the project PI shall present any modifications and/or complements to the file that do not already figure in the first two sections. The modifications in question shall not concern either spelling or grammar.

The reference of the location in the text (paragraph number) of the amended project shall be specified each time.

All the texts figuring in this part shall be copied exactly as they are and inserted in the correct place in the amended project presentation document.

1. See §3.2, pages 13-14 in the call for projects [↑](#footnote-ref-1)
2. See definition given in the call for proposals [↑](#footnote-ref-2)
3. For example: company, etc. [↑](#footnote-ref-3)
4. For example: *Conseil Régional* (Regional Council) etc. [↑](#footnote-ref-4)
5. Take the overall grant of the funding agreement. [↑](#footnote-ref-5)
6. L M D = Equivalent to Bachelor's, Master's and Ph.D. degrees respectively [↑](#footnote-ref-6)