Marie Skłodowska-Curie Actions

Key features

- high-impact research output
- a link between business, research and higher education
- for all career stages
- benefits society
- good working conditions
- open to the world
- international mobility
- inter-sectoral mobility
- bottom-up approach
- interdisciplinarity
- expands scientific knowledge
- hosts in any country or sector
- informing decision-makers

All domains of RESEARCH AND INNOVATION

UK MSCA NCP Information Event,
Individual Fellowships 2018 Call
LSBU London, 25 April 2018
Session overview (London)

11.00  Registration and coffee
11.30  Introduction to Individual Fellowships, financial issues and submission  
       Malgorzata Czerwiec, UK National Contact Point for MSCA, UKRO

12.45  Writing a successful IF proposal – Fellow’s perspective  
       Dr Helena Duffy, Royal Holloway, University of London

13:15  Q&A session

13.30  Lunch break

14.30  Award criteria and evaluation process of proposals  
       Malgorzata Czerwiec, UK National Contact Point for MSCA, UKRO

15.30  Writing a successful IF proposal – Supervisor’s and evaluator’s perspective  
       Dr Pierre Purseigle, Warwick University, History Department

16.00  Q&A session

16:30  End
About UKRO

Mission

• To maximise UK engagement in EU-funded research, innovation and higher education activities

Our office

• Based in Brussels
• European office of the UK Research Councils
• Delivers subscription-based advisory services for around 150 research organisations in the UK and beyond
• Also provides National Contact Point services on behalf of the UK Government
UKRO National Contact Points

- Advice on the European Research Council and the Marie Skłodowska-Curie Actions

- Websites
  - [www.ukro.ac.uk/erc](http://www.ukro.ac.uk/erc)
  - [www.ukro.ac.uk/mariecurie](http://www.ukro.ac.uk/mariecurie)

- Helpdesk
  - [erc-uk@bbsrc.ac.uk](mailto:erc-uk@bbsrc.ac.uk); Phone: 0032 2289 6121
  - [mariecurie-uk@bbsrc.ac.uk](mailto:mariecurie-uk@bbsrc.ac.uk); Phone: 0032 2230 0318

- Follow UKRO NCPs on social media [LinkedIn](https://www.linkedin.com) [Twitter](https://twitter.com) [@_UKRO_](https://twitter.com)

- Funded by Department for Business, Energy & Industrial Strategy
21 to 22 June at the National Oceanography Centre in Southampton

Registration now open!
Early bird rate until 30 April

Key 2-day event of EU policy and networking for European Liaison Officers, European research managers, Research Councils and policy makers;

High-level European Commission and other speakers;

A mix of R&I policy-oriented plenary sessions and panel discussions as well as parallel and practical sessions: *The transition from Horizon 2020 to the next EU Framework Programme*, *Continuity of the UK involvement in and post Horizon 2020*, *Impact in Horizon 2020 Projects*, *International Cooperation*, and *UN Sustainable Development Goals*, and more...

[www.ukro.ac.uk/aboutukro/Pages/18_ukro_conference.aspx](http://www.ukro.ac.uk/aboutukro/Pages/18_ukro_conference.aspx)
Continued UK Engagement in Horizon 2020
Current situation and key facts

• Referendum on the UK’s membership of the EU took place on 23 June 2016

• Article 50 invoked on 29 March 2017

• The UK is still an EU Member State and continues to be until the end of the negotiations and the formal exit.

• This means it has the same rights and obligations as all other 27 Member States, including the participation in EU funding programmes.

• The exact details on how the UK can participate after the UK exits the EU are determined during the negotiations.
Negotiation timeline

- Negotiation period - 2 years from 29 March 2017
- **Joint report** released on 8 December 2017 – EU 27 agreed to move to 2\textsuperscript{nd} stage of negotiations on 15 December 2017

<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>UK notification</td>
<td>29 March 2017</td>
<td>29 April 2017</td>
</tr>
<tr>
<td>European Council guidelines (agreed by consensus without UK)</td>
<td>May 2017</td>
<td>May 2017</td>
</tr>
<tr>
<td>Commission Recommendation (open the negotiations)</td>
<td></td>
<td>Actual negotiating period: ≈ 18 months</td>
</tr>
<tr>
<td>Agreement proposal from the negotiator to the Council</td>
<td>At the latest by autumn 2018</td>
<td>At the latest by February 2019</td>
</tr>
<tr>
<td>EP consent (simple majority of votes, including UK MEPs)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conclusion of the agreement by the Council (strong QMV\textsuperscript{*})</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End of UK membership</td>
<td></td>
<td>March 2019</td>
</tr>
</tbody>
</table>

\textsuperscript{*} **Strong QMV** = 72% of the 27 Member States, i.e. 20 Member States representing 65 % of the EU 27 population.

Source: European Commission
Continued UK participation

- Joint Report EU negotiators/UK Government (8 December 2017) – financial settlement

"Following withdrawal from the Union, the UK will continue to participate in the Union programmes financed by the MFF 2014-2020 until their closure."

- Technical details still to be established during the negotiation
- Nothing is agreed until everything is agreed
UK Government key messages and Q&A

- Government Horizon 2020 Q&A published in March 2018
- UKRO works closely with BEIS – many queries from community included.
- Key messages:

The UK Government encourages the UK research and innovation (R&I) community to continue applying for Horizon 2020 funding and participating in Horizon 2020 projects because:

- Until our departure from the EU, we remain a Member State, with all the rights and obligations that entails. This means that UK entities are eligible to participate in all aspects of the Horizon 2020 programme while we remain a member of the EU.

- **The UK and the EU fully intend UK entities’ eligibility in Horizon 2020 to remain unchanged for the duration of the programme, as set out in the Joint Report. This includes eligibility to participate in all Horizon 2020 projects and to receive Horizon 2020 funding for the lifetime of projects.**

- The Government’s underwrite guarantee remains in place in the event that commitments made in the Joint Report are not met.
Joint Report

Will UK beneficiaries in existing projects continue to receive EU funding?
- Yes; the Joint Report envisages that existing projects will continue to receive an uninterrupted flow of EU funding for the lifetime of the project.

Will UK participants continue to be able to bid for Horizon 2020 funding after the UK’s withdrawal from the EU?
- Yes; the Joint Report envisages that UK participants will be eligible to bid for Horizon 2020 funding for the duration of the programme, including after the UK’s withdrawal from the EU. On this basis, the UK Government encourages UK participants to continue to bid for Horizon 2020 funding.

Will UK participants be eligible to participate in and coordinate Horizon 2020 consortia?
- Yes; the Joint Report envisages full UK participation in Horizon 2020 for the lifetime of the projects, which includes participating in and coordinating consortia.

Will UK participants be eligible to bid for individual Horizon 2020 grants?
- Yes; the Joint Report envisages full UK participation in Horizon 2020 for the lifetime of the projects, which includes individual grants.

Will UK participants in Framework Programme 7 continue to receive EU funding?
- Yes; the Joint Report envisages that existing projects will continue to receive an uninterrupted flow of EU funding for the lifetime of the project. This includes funding for FP7 participants.

Will the UK take part in Framework Programme 9?
- The UK has declared it would like to reach an ambitious science and innovation agreement with the EU, with the Joint Report stating the UK may wish to participate in some union budgetary programmes post-2020, which could include future framework programmes. It is too early to speculate on whether the UK will seek to Associate to Framework Programme 9.
Minister Gyimah at the Brexit Science Summit

Dept for BEIS @beisgovuk · 2h
Science Minister @SamGyimah spoke at the Science & Technology Committee #BrexitScienceSummit this morning and reaffirmed the UK’s position that we would like a strong and ambitious partnership with our European partners for science, research & innovation #IndustrialStrategy

Sam Gyimah
Minister for Universities, Science, Research and Innovation

"I want scientists and researchers across the UK to keep on pursuing projects and collaborations that Horizon 2020 can support. The opportunities are huge."
Statement 4 July 2016: "until the UK leaves the EU, EU law continues to apply to and within the UK, both when it comes to rights and obligations. This includes the eligibility of UK legal entities to participate and receive funding in Horizon 2020 actions."

The Commission explicitly briefs evaluators in their guidance: “Experts should not evaluate proposals with UK participants any differently than before.”

The Commission explicitly covers the outcome of the UK referendum in the guidance for evaluators:

Commission guidance for coordinators

Marie Skłodowska-Curie Actions (MSCA)

Policy background, schemes overview and basic participation rules
Horizon 2020 structure

Excellent Science
- European Research Council (ERC)
- Future and Emerging Technologies (FET)
- Marie Skłodowska-Curie Actions (MSCA)
- Research Infrastructures

Industrial Leadership
- Leadership in Enabling and Industrial Technologies (LEIT) - ICT, NMBP, Space
- Access to Risk Finance
- Innovation in SMEs

Societal Challenges
- Health and Wellbeing
- Food security
- Transport
- Energy
- Climate action
- Societies
- Security

Widening Participation; Science with and for Society, Mainstreaming of Social Sciences and Humanities (SSH) and ICT, Fast Track to Innovation

European Institute of Innovation and Technology (EIT)
EURATOM
Joint Research Centre (JRC)
“...contribute to excellent research, boosting jobs, growth and investment by equipping researchers with the new knowledge, skills and international and intersectoral exposure to fill the top positions of tomorrow and solve current and future societal challenges...based on the principle of mobility...open to researchers and innovation staff at all stages... ensuring good working conditions and work/life balance...”

- Have a structuring effect on the European Research Area through trans-national and inter-sectoral mobility to create a European labour market for researchers

- Strengthen human potential by:
  - Encouraging people to become researchers
  - Encouraging researchers to carry out their research in Europe
Marie Skłodowska-Curie Actions (MSCA) have supported more than 100,000 researchers so far.

MSCA researchers (all projects combined)

- FP4-FP6 1994-2006: 30,000
- FP7 2007-2013: 40,000
- Horizon 2020 2014-2020: 65,000

8 Nobel laureates
1 Oscar winner*

* A team of software developers involved with MSCA won an Academy Award in 2006 for their work on visual effects software. http://europa.eu/1qK83Yg
Marie Skłodowska-Curie Actions

- **Innovative Training Networks (ITN)**
  - For Early Stage Researchers

- **Individual Fellowships (IF)**
  - For Experienced Researchers

- **Research and Support Staff Exchange (RISE)**
  - Exchange visits (secondments) of staff

- **Co-funding of programmes (COFUND)**
  - For regional, national, international doctoral or fellowship programmes
Marie Skłodowska-Curie Actions

• Coordination and support action
• Europe-wide public and media event dedicated to the promotion of science and research careers
• Call published every two years

Researchers’ Night
Marie Skłodowska-Curie Actions

- Operates on a ‘bottom-up’ basis
- For any research and innovation ideas (basic research; market take-up)
- **Mobility** (cross-border and cross-sector) is a key requirement
- Enhance skills of **people behind research and innovation**
- Strong participation across sectors
- Dissemination and **public engagement** - public outreach
- **Gender balance** – equal opportunities in the research content
Marie Skłodowska-Curie Actions

For institutions

• Run and take part in collaborative cross-border, cross-sector research, researcher training and/or staff exchange programmes on a research topic and field of their choice
• Employ talented, well-funded researchers in any research field

For individuals

• Well-remunerated 1-3 year research fellowships in the best research facilities in their field in Europe and overseas
• PhD studies in the context of a pan-European research training network
• Exposure to work in the non-academic sector
Who is eligible for funding?

- EU Member States
- Associated Countries
- Third countries
Countries Eligible for Funding

All 28 EU Member States:
- Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom

- Overseas Countries and Territories (OCT) linked to the Member States
  - For example: Anguilla, Aruba, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Curaçao, Falkland Islands

- 16 Associated Countries:
  - Norway, Iceland, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine Tunisia, Armenia and Georgia.

- Third countries (their eligibility for EU funding depends on their GDP; only countries mentioned in Annex A to the WP are eligible to automatically receive H2020 funding)
<table>
<thead>
<tr>
<th>Call identifier</th>
<th>Publication date</th>
<th>Deadline</th>
<th>Call budget, €M</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSCA-ITN-2018</td>
<td>12 October 2017</td>
<td>17 January 2018</td>
<td>442</td>
</tr>
<tr>
<td>MSCA-RISE-2018</td>
<td>22 November 2017</td>
<td>21 March 2018</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-RISE-2019</td>
<td>4 December 2018</td>
<td>2 April 2019</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-IF-2018</td>
<td>12 April 2018</td>
<td>12 September 2018</td>
<td>273</td>
</tr>
<tr>
<td>MSCA-IF-2019</td>
<td>11 April 2019</td>
<td>11 September 2019</td>
<td>295.62</td>
</tr>
<tr>
<td>MSCA-COFUND-2018</td>
<td>12 April 2018</td>
<td>27 September 2018</td>
<td>80</td>
</tr>
<tr>
<td>MSCA-COFUND-2019</td>
<td>4 April 2019</td>
<td>26 September 2019</td>
<td>90</td>
</tr>
<tr>
<td>MSCA Researchers’ Night</td>
<td>7 November 2017</td>
<td>14 February 2018</td>
<td>12</td>
</tr>
</tbody>
</table>
MSCA IF 2018 Call budget

- **European Fellowships (EF)**: Held in EU Member States or Associated Countries
  - Budget: 220 M€

- **Society and Enterprise Panel (SE)**: Only for non-academic beneficiaries
  - Budget: 8 M€

- **Global Fellowships (GF)**: based on a secondment to a third country
  - Budget: 45 M€

**Overall Indicative Budget:** 273 million €

Source: European Commission
# Key MSCA Definitions

<table>
<thead>
<tr>
<th>ITN</th>
<th>COFUND</th>
<th>RISE</th>
<th>Individual Fellowship</th>
<th>RISE</th>
<th>COFUND</th>
</tr>
</thead>
</table>

### Early Stage Researcher (ESR)
At the time of recruitment (ITN) by the host organisation, must be in the first 4 years (full-time research experience) of their research careers and have not been awarded a doctoral degree.

### Experienced Researcher (ER)
At the time of the call deadline (IF) or secondment (RISE) by the host organisation, must be in possession of a doctoral degree or have at least 4 years of full-time equivalent research experience.

### Academic sector
Includes universities and higher education institutions (public and private) awarding degrees, non-profit research institutions (public and private), and international European interest organisations.

### Non-academic sector
Includes any socio-economic actor not included in the academic sector.
Key MSCA Definitions

Long-term residence

- A period of legal and **continuous residence** within EU Member States or Horizon 2020 Associated Countries of at least **5 consecutive years**. Periods of absence from the territory of the Member State or Horizon 2020 Associated Country shall be taken into account for the calculation of this period where they are shorter than 6 consecutive months and do not exceed in total ten months within this period of five years.

Applicable to:
- Reintegration Panel under European Fellowships, and
- Global Fellowships
Part-time Arrangements

• In previous calls, fellows were expected to work full-time on the MSCA fellowships, part-time arrangements were only possible due to special personal circumstances (if approved by the Research Executive Agency).

• MSCA Work Programme 2018-20 more flexibility:
   “During the implementation phase of the action, researchers may opt to work part-time in order to pursue supplementary activities. These might include creating a company, or engaging in advanced studies not related to the MSCA grant. Note, however, that part-time work on these grounds cannot be requested during the outgoing phase of the Global Fellowships. Any supplementary activities carried out part-time in parallel with the MSCA action must be agreed upon by the researcher and the beneficiary and are subject to the prior approval of the REA.”
Individual Fellowships (IF)

Objectives of the scheme, eligibility and finances
Individual Fellowships (IF)

• Individual grant for **experienced researchers** to support their **mobility**, **research project** and **training**

• Opportunity to gain new knowledge **in** and **outside academia**, work on research projects **in** or **outside Europe**

• **Fully-funded** fellowships (salary, travel, research costs) hosted by **academic** or **non-academic** organisation

• No nationality, age or career stage restrictions

• Specific support for **return** of researchers to Europe (RI) and career **restart** for individuals with high potential who have been out of active research (CAR)
Individual Fellowships (IF)

European Fellowships (12-24/36 months)
- Standard Panel
- Enterprise and Society Panel
- Career Restart Panel (CAR) - up to 36 months
- Reintegration Panel (RI)

From any country to MS/AC

New

Global Fellowships (12-24 months + 12 month return phase)

Secondment from MS/AC to third country
Mandatory return phase in Europe (not subject to mobility rule)
Widening Fellowships (WF)

NOT applicable to the UK-based Fellowships
WF option does not appear in the e-form if the host is not a widening country

- Its aim is to tackle disparities in performance of countries in MSCA
- WF call is a pilot under the "Spreading Excellence and Widening Participation“ part of the H2020 Work Programme, not in MSCA WP, with the budget of **€5M in 2018** (around 35 fellowships)
- Researchers applying to undertake their IF in a Widening country will get a **second chance** of funding through Widening Fellowships (WF)
- Open to all researchers irrespective of nationality
- Applies to all MSCA EF; Global Fellowships are excluded
- Applicants should submit their proposal to the MSCA-IF-2018 call only
- Applicants to IF can request not to be considered for the WF call by ‘opting out’
Widening countries under H2020

• Member States:
Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

• Associated Countries:
Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, Former Yugoslav Republic of Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.
Mobility and Eligibility Rule

• **Standard European Fellowship**
   At the time of the call deadline, researchers shall not have resided or carried out their main activity (work, studies, etc.) in the country of their host organisation for more than **12 months in the 3 years**

• **Reintegration Panel (RI), Career Restart Panel (CAR) & Society and Enterprise (SE)**
   At the time of the call deadline, researchers shall not have resided or carried out their main activity in the host country for **3 in the 5 years**
   - Must be nationals or long-term residents (**up-dated definition**) of a MS/AC (RI)
   - For those who want to (or recently have) relocated to MS/AC from outside (RI)
   - For those who have not been active in research for at least **12 months within the 18 months** immediately prior to the deadline for submission (CAR)
   - Must be hosted and supervised at non-academic sector institution (SE)
Society and Enterprise Panel

Introduced in 2016-2017

Main Features

- **Multidisciplinary panel** under European Fellowships
- Dedicated budget of €8 million
- Open to organisations from the non-academic sector
- Research and innovation-related projects can be funded
- Relaxed mobility rule to apply (as with CAR and RI):
  - *The future fellow cannot have spent more than 3 years in the 5 years leading up to the call deadline in the country in which they intend to be hosted*
Mobility and eligibility rule

- **Global Fellowship**

At the time of the call deadline, researchers shall not have resided or carried out their main activity (work, studies, etc.) **in the Third Country** where their outgoing phase will take place, for more than **12 months in the last 3 years**

- = mobility rule applies to third country only
- = no mobility rule for the return phase in MS/AC

Candidates must be **nationals or long-term residents** (continuous residence >5 years in MS/AC)
Individual Fellowship Project

- **Research** - completely **bottom up** – any excellent research project in any research / innovation field
- Calibre of **researcher** important
- Researcher and **host institution** work together on application
- Grant **beneficiary** is the host institution
- Grants can (very) exceptionally be portable
- Usually **full-time research fellowship** but can incl. some supervision or teaching;
- Requests to REA for **part-time** working may be possible during grant negotiation / life-time of grant - (including for professional grounds)
Individual Fellowship activities

- ‘Training-through-research’ at the host institution of Fellow’s choice, with named Supervisor

- Realistic and well-defined objectives in terms of research project and career advancement, incl. a Career Development Plan (if successful)

- Develop and significantly widen the competences of the researcher, incl. multi-interdisciplinary expertise, inter-sectoral experience and transferable skills

- Public engagement activities

- Optional secondment (should significantly add to the impact of the research project) of up to 3-6 months
Secondments in IF project

<table>
<thead>
<tr>
<th>Duration of IF project</th>
<th>Max. secondment duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤18 months</td>
<td>3 months</td>
</tr>
<tr>
<td>&gt;18 months</td>
<td>6 months</td>
</tr>
</tbody>
</table>

- Highly recommended as a tool for knowledge transfer and training opportunity
- Must take place in **MS/AC** (but shorter visits to Third Countries eligible)
- Can be split into shorter periods
- Expected to take place in a different sector (non-academic/academic)
Secondments in IF project - GF novelty

<table>
<thead>
<tr>
<th>Duration of IF project</th>
<th>Max. secondment duration</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤18 months</td>
<td>3 months</td>
</tr>
<tr>
<td>&gt;18 months</td>
<td>6 months</td>
</tr>
</tbody>
</table>

- For Global Fellowships, **an optional secondment** can also take place **at the start of the project at the beneficiary** or its entity with a capital or legal link and/or a partner organisation **in a MS or AC for a maximum of 3 months**, allowing the researcher to spend time there before moving on to a partner organisation in a Third Country.

- In such cases, the initial secondment will be considered as **part of the outgoing phase**.
Include your secondment in Part A

5 - Call specific questions

Eligibility Researcher (future fellow)

1. Were you in the last 5 years in military service?  
   - Yes  - No

Other Questions

1. For communication purposes only, the European Commission REA asks for permission to publish the name of the researcher (future fellow) should the proposal be retained for funding. Does the researcher (future fellow) give this permission?  
   - Yes  - No

2. Some national and regional public research funding authorities run schemes to fund MSCA applicants that score highly in the MSCA evaluation but which cannot be funded by the MSCA due to their limited budget. In case this proposal could not be selected for funding by the MSCA, do the researcher and supervisor consent to the European Commission disclosing to such authorities the results of its evaluation (score and ranking range) together with their names and contact details, non-confidential proposal title and abstract, proposal acronym, and host organisation?  
   - Yes  - No

3. Is there a secondment in Member States or Associated Countries envisaged in Part B of this proposal?  
   - Yes  - No

Add Secondments

In which sector is the secondment in Member States / Associated Countries foreseen?  
- Academic  - Non Academic

Do you already know the organisation to which this secondment will be?  
- Yes  - No

Name

Country
Secondments:

- Out of a total number of 7,409 evaluated proposals, 2,189 proposals included a secondment phase (percentage 29.5%).
- Out of a total number of 1,305 retained proposals (main list), 441 proposals included a secondment phase (percentage 33.7%).

Fellows with PhD:

- Out of a total number of 7,409 evaluated proposals, 6,803 fellows had a PhD degree (percentage 91.8%).
- Out of a total number of 1,305 retained proposals (main list), 1,219 fellows had a PhD degree (percentage 93.4%).
# Proposal budget

<table>
<thead>
<tr>
<th>Scheme</th>
<th>Living allowance*</th>
<th>Mobility allowance</th>
<th>Family allowance</th>
<th>Research, training and networking costs</th>
<th>Management and overheads</th>
</tr>
</thead>
<tbody>
<tr>
<td>IF</td>
<td>4880</td>
<td>600</td>
<td>500</td>
<td>800</td>
<td>650</td>
</tr>
</tbody>
</table>

- Funding based fully on **unit costs**, multiplied by requested person months
- **Automated calculation** of budget when person months filled into application
- No detailed financial reporting

- A correction co-efficient applies to living allowance, see MSCA Work Programme!
  
  **E.g. 139.83% for the UK**
Researchers must be recruited on full employment contract.

Researcher unit costs given are gross amounts from which both employer and employee statutory deductions can be made.

The family status of a researcher will be determined at the date of deadline of the call (i.e. 12 September 2018) and will not be revised during the lifetime of the project.

Candidates should check with the host institution how the salary will be calculated (national and internal rules, exchange rate policy, etc.)
Institutional costs

The Research, training and networking:

- costs for training and networking activities that contribute directly to the researcher’s career development (e.g. participation in conferences, trips related to the work of the action, training, language courses, seminars, lab material, books, library records, publication costs)
- costs for research expenses
- costs for visa-related fees and travel expenses
- costs arising from secondments (e.g. travel costs, accommodation)

Management and indirect - covers all general costs of the host institution connected to organising and implementing secondments (administrative and financial management, logistics, ethics, human resources, legal advice, etc.).

Institutional costs are managed by the host institution according to the usual internal policies, e.g. travel policy, purchase policy apply.
**MSCA Special Needs Allowance**

- Additional MSCA special needs allowance is foreseen in the MSCA Work Programme 2018-20
- Financial support for the additional costs entailed by recruited researchers with disabilities whose “long-term physical, mental, intellectual or sensory impairments are as such that their participation in MSCA would not be possible without extra financial support” (based on [UN Convention on the Rights of Persons with Disabilities](http://www.un.org/disabilitiesاسب/09/05/convention_on_persons_with_disabilities.html) definition)
- It will be open to all MSCA schemes and limited to a max. of €60,000 per researcher
- It will be available as of Q1 2019
- It will take the form of a Coordination and Support Action
- A request for such an allowance can be made by the beneficiary at any time during project implementation
Annotated Model Grant Agreement

- **AMGA** covers financial rules and management (see page 441 for IF)
MSCA projects

http://ec.europa.eu/euraxess

http://cordis.europa.eu
MSCA Expression of Interest (EOI)

Are you looking for a partner institution for your ITN or RISE project, or a host institution for your fellowship or fellowship positions? Check out the links below. If you are an institution wishing to publish your MSCA job offers, please contact net4mobility@euresearch.ch

Last update: 03.07.2016

By Country

Austria
- Syoyo - IF, various topics
Belgium
- Belgium - University of Antwerp
Bulgaria
- University of Chemical Technology and Metallurgy, Sofia - ITN
- Institute of Art Studies, Bulgarian Academy of Sciences
- Institute of Nuclear Research and Nuclear Energy, Bulgarian Academy of Sciences - ITN, RISE
Brazil
- Faculdades Integradas Teresa D'Avila – FATEA – Redes Salesianos - IF
Colombia
- Universidad Nacional de Colombia/Departamento de Quimica/Facultad de Ciencias
- Tecnological University From Pereira
Croatia
- University of Osijek, Department of Cultural Studies
- Croatia - Learning and development digital agency eWyse, Zagreb

By MSC Actions

Innovative Training Networks (ITN)
- Bulgaria - University of Chemical Technology and Metallurgy
- Bulgaria - Institute of Art Studies, Bulgarian Academy of Sciences
- Bulgaria - Institute of Nuclear Research and Nuclear Energy, Bulgarian Academy of Sciences
- Czech Republic - Phd Students
- Croatia - University of Osijek, Department of Cultural Studies
- Croatia - Learning and development digital agency eWyse, Zagreb
- Georgia - Caucasus University
- ETN on energy harvesting communication networks
- Poland, University of Lodz

Individual fellowships (IF)
- Austria - Syoyo
- Belgium - University of Antwerp
- Belgium - University of Gent
- Belgium - University of Leuven

Brazil - Faculdades Integradas Teresa D'Avila – FATEA – Redes Salesianos
- Croatia - University of Osijek, Department of Cultural Studies
- Germany - Postdoc positions, regularly updated website by KOWI
- Greece - National Centre for Scientific Research

By Panel

All or Several
- Belgium - University of Antwerp
- Belgium - University of Gent
- Belgium - University of Leuven
- Brazil - Faculdades Integradas Teresa D'Avila – FATEA – Redes Salesianos - IF
- Ireland - IF Host Institutions
- Italy - EURAC MSCA Week
- Italy - University of Padova
- Italy - Aspilin, the Special Agency for International and Innovation Activities of Frosinone Chamber of Commerce
- Italy - Università delle Studi di Brescia
- Italy - Bluefarm - IF
- Italy - GREANDERATION - IF
- Georgia - Caucasus University
- Greece - National Hellenic Research Foundation
- Greece - ELLI-NEP - IF
- Poland - AGH-ELONIAN UNIVERSITY - IF
- Spain - ESHorizon 2020
- Spain - RUVID - IF
- Spain - University of Cadiz - IF
- Slovenia - IF Expression of Interest - University of Ljubljana
- Sweden - Vinnova - COFUND

Life Sciences
- Bulgaria Agricultural University
- Italy - REPEAT Project
- Germany - Postdoc positions, regularly updated website
MSCA-IF-EF-SE 2017: Experienced Researcher

<table>
<thead>
<tr>
<th>ORGANISATION/COMPANY</th>
<th>VISIONA Ingeniería de Proyectos S.L.</th>
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<tr>
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<td>H2020 / Marie Sklodowska-Curie</td>
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<td>PROGRAMME</td>
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<tr>
<td>MARIE CURIE GRANT AGREEMENT NUMBER</td>
<td>Proposal to be submitted before 14/09/17</td>
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VISIONA welcomes an Experienced Researchers, i.e. Post-PhD or have at least 4 years of full time equivalent research, coming from any Member State or Associated Country to H2020 to or moving within Europe, who may have stayed no more than 3 years in the 5 years before 14/09/17 in Spain.

VISIONA offers the participation in a research and innovation-related project in the field of Information Science and Engineering (ENG) Sub-Area of research: 01 - Computer science and informatics. For a period of 12 to 24 months duration. Starting in May/June 2018. Option of secondment to academic sector.
How to find a fellow / host institution?

Partner Search Tool on the Call Page in the Participant Portal

<table>
<thead>
<tr>
<th>REQUEST DATE</th>
<th>ORGANISATION NAME</th>
<th>ORGANISATION TYPE</th>
<th>COUNTRY</th>
<th>EXPERTISE REQUEST OR OFFER</th>
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Leiden University Medical Center (LUMC), The Netherlands, is looking for talented postdocs in Life Sciences. Besides applying for MSCA-IF, also consider to apply for the LEaDing Fellows Postdocs Programme (MSCA-COFUND): 3rd call deadline = 31 October 2018. Read more here (including a selection of interested hosting groups):
https://www.lumc.nl/research/leading-fellows/

| 12 Apr 2018  | POLITECNICO DI MILANO       | Higher or secondary education establishment | IT      | Expertise offer           | CO      |
|              |                           |                                   |         |                           | SD      |

MSCA EF Master Class 2018 @ Polimi Politecnico di Milano is launching a pilot Master Class for 3 days (11-13 June 2018) for potential applicants to the MSCA - European Individual Fellowship call 2018. The aim of the call is to attract and train young and talented researchers to successfully applying with the Politecnico di Milano as host institution. All details at:
United Kingdom Chapter

The “UK Chapter” is an initiative of Marie Curie Fellows from a range of Institutions located in the UK.

We believe that being part of the “Marie Curie Alumni Association” as a chapter can allow Marie Curie Fellows to actively operate on a local basis and create stronger interconnection amongst them. Ultimately, this will lead to reaching the major objectives of the MCA Association.

MCAA-UK Pub evening on 25 April

Submitted 2 days 3 hours ago by Stefan Bauer.

We have a table booked on Wednesday 25 April at The Admiralty pub (The Admiralty, 86 Trafalgar Square, London, WC2N 5DS) from 6.30pm.

This gives you an opportunity to meet other MCA researchers and alumni, to see people again you have recently met at the General Assembly in London or to network and make new friends.

It will also give you a chance to be involved with the organization of future events if you wish to.

All welcome for a friendly chat & drink!
Upcoming webinar, 14 May 2018

[Eventbrite webinar page]

https://www.eventbrite.com/e/open-science-clinique-winning-marie-curie-with-open-science-tickets-45060049822
Individual Fellowships
(IF)
Proposal submission
Participant Portal

Please note that Participant Portal services will be under maintenance today Thursday 28th of April 2016 between 17:15 and 19:00 (CET). We apologise for any inconvenience this may cause.

Horizon 2020 Funding
Starting from 1/1/2014

On this site you can find and secure funding for projects under the following EU programmes:

- 2014-2020 Horizon 2020 - research and innovation framework programme
- 2007-2013 7th research framework programme (FP7) and Competitiveness & Innovation Programme (CIP)
- Research Fund for Coal & Steel, COSME, 3rd Health Programme, Consumer Programme, Justice Programme
- New since January 2016: Promotion of Agricultural Products Programme

Non-registered users
- search for funding
- read the H2020 Online Manual & download the legal documents
- check if an organisation is already registered
- contact our support services or check our FAQs

Registered users
- submit your proposal
- sign the grant
- manage your project throughout its lifecycle
- register as expert advising the Commission

WHAT'S NEW?  FUNDING OPPORTUNITIES  HOW TO PARTICIPATE  WORK AS AN EXPERT  MY PERSONAL AREA  INFORMATION AND SUPPORT
Calls for Proposals

Horizon 2020

- Marie-Sklodowska-Curie Actions

Status: Calls with open topics

Sort by: Publication date

Excellent Science
Marie Skłodowska-Curie Individual Fellowships
H2020-MSCA-IF-2018
Publication date: 27 October 2017

Excellent Science
Marie Skłodowska-Curie Co-funding of regional, national and inter ...
H2020-MSCA-COFOUND-2018
Publication date: 27 October 2017
Call updates

- **12 April 2018 16:41** The submission session is now available for: MSCA-IF-2018(MSCA-IF-EF-RI-MSCA-IF-EF-CAR)
- **12 April 2018 00:30** The submission session is now available for: MSCA-IF-2018(MSCA-IF-EF-SE-

Topics and submission service

To access the Submission Service, please select the TOPIC of your interest and then open the Submission Service tab. To access existing draft proposals, please login to the portal and select My Proposals from the My Area menu.

Status
- ✔ Forthcoming
- ✔ Open
- ✔ Closed

Sort by
- (Planned) opening date
- Deadline
- Topic title
- Topic identifier

Topic: **MSCA-IF-2018: Individual Fellowships**
Publication date: 27 October 2017

Types of action:
- MSCA-IF-GF Global Fellowships
- MSCA-IF-EF-ST Standard European Fellowships
- MSCA-IF-EF-SE Society and Enterprise panel
- MSCA-IF-EF-RI Reintegration panel
- MSCA-IF-EF-CAR Career Restart panel

Deadline Model:
- single-stage

Opening date: 12 April 2018
Deadline: 12 September 2018 17:00:00

Time Zone: (Brussels time)
To access existing draft proposals for this topic, please login to the Participant Portal and select the My Proposals page of the My Area section.

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<tr>
<th>Type of Action</th>
<th>Topic</th>
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<td>Society and Enterprise panel [MSCA-IF-EF-SE]</td>
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<td>Standard EF [MSCA-IF-EF-ST]</td>
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<tr>
<td>Global Fellowships [MSCA-IF-GF]</td>
<td>Individual Fellowships - MSCA-IF-2018</td>
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</table>

Guidance on proposal submission: [H2020 ONLINE MANUAL](#)

IT Guidance: [HOW TO](#)
5. Proposal templates, evaluation forms and model grant agreements (MGA):

Specific rules and funding rates are described in the MSCA part of the Work Programme.

Support information can be found in the **Guide for applicants MSCA-IF**.

Other useful documents:
- Standard proposal template
- MSCA standard evaluation form

8. Additional documents:

- **Introduction of the Work Programme 2018-20**
- **Marie Sklodowska-Curie Actions (MSCA) - Work Programme 2018-20**
- **Dissemination, Exploitation and Evaluation WP 2018-20**
- **General annexes to the Work Programme 2018-2020**

Legal basis: Horizon 2020 Regulation of Establishment
Legal basis: Horizon 2020 Rules for Participation
Legal basis: Horizon 2020 Specific Programme
RESEARCH & INNOVATION
Participant Portal

Frequently Asked Questions (FAQ)

Welcome to the new Participant Portal FAQ section.

Those pages are updated with the answers to the most frequent questions that have been submitted to the Horizon 2020 Helpdesk, IT Helpdesk, Call Coordinators and H2020 NCP correspondents.

Show also archived FAQs.

16 Results

Marie Skłodowska-Curie actions: Individual Fellowships (IF)

Q. Under Marie Skłodowska Curie individual European fellowships (MSCA-IF-2015-EF): What are the Individual Fellowship (IF) opportunities available to SMEs and companies?
A. SMEs and other companies can apply to host the fellowship and thus benefit from the services and valuable experience of a highly talented, fully funded researcher for at least a year...

Q. Under Marie Skłodowska Curie individual fellowships (MSCA-IF-EF), how is the four years of full-time equivalent research experience calculated?
A. Experience is calculated from the "date when a researcher obtained the degree which would formally entitle him or her to embark on a doctorate..." This may vary from country to country...

Q. Under the eligibility conditions for the Marie Skłodowska Curie Individual fellowships (MSCA-IF), is a Medical Doctor (MD) degree equivalent to a PhD?
A. In the context of Marie Skłodowska-Curie actions, Medical Doctor (MD) studies are not considered as equivalent to PhD studies. For MDs, the requirement of 4 years of full-time research...

Q. Under Marie Skłodowska Curie individual European fellowships (MSCA-IF-EF), the researcher has been living in country A (Member State) for more than one year. Is the researcher eligible to apply for an European Individual Fellowship (IF) there?
A. No, the researcher would not be eligible for an IF European in country A. The application of the eligibility criteria for the MSCA Individual Fellowship is very strict and includes c...

Q. Under Marie Skłodowska Curie individual European fellowships (MSCA-IF-EF), is a researcher who already participated in a project funded under FP6 or FP7 eligible to apply for an MSCA Individual Fellowship?
A. Yes, if the researcher fulfills the eligibility conditions for the Individual Fellowship, they can apply even if they participated in a project funded under FP6 or FP7. In this case ...
Proposal Submission

- **Host organisation** (‘Supervisor’ or other ‘Contact’) or the Fellow registers the draft proposal
  - PIC code
  - Draft acronym, draft summary, choice of panel

- **Supervisor, other Contact or Fellow** give each other access onto the proposal

- Proposal is completed
  - Administrative forms (‘Edit forms’)
  - Part B – Two parts (B1 and B2) (‘Download template’ in MS Word and ‘Upload’ as Pdf.)

- Proposal should be submitted by the Supervisor
  - Submission system checks (‘Validate forms’ and ‘Print preview’)
  - ‘Submit’ as many times as required until the deadline; **submit early and often!**
Step 5
Edit Proposal

Edit Proposals' Forms

In this step you can edit the administrative forms and upload the proposal itself.

**WARNING:** This proposal contains changes that have not been saved.

Administrative Forms

Edit will open the forms.

- edit forms
- view history
- print preview

Part B and Annexes

In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments.

- Part B1
  - upload
- Part B2
  - upload

Part A: Administrative Forms – on-line only

Part B: Pdf doc to be uploaded

Part B: Template available to download
**Topic:** MSCA-IF-2018  
**Type of action:** MSCA-IF-EF-ST  
(Standard European Fellowships)  
**Proposal number:** SEP-210514033  
**Proposal acronym:** test  
**Deadline Id:** H2020-MSCA-IF-2018

Table of contents

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<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Action</th>
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<tbody>
<tr>
<td>1</td>
<td>General information</td>
<td>abstract, acronym, panel</td>
</tr>
<tr>
<td>2</td>
<td>Participants &amp; contacts</td>
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<tr>
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<td>4</td>
<td>Ethics</td>
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<td>5</td>
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### Budget – Automatically Calculated

#### 3 - Budget

**Note:** gross amount that covers both employer and employee contributions. Check with host regarding net salary.

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</table>

**Populated based on number of person month and country**
Part B-1:

The **maximum** total length for this document is **10 pages**. It should be composed as follows (detailed description below):

- Section 1: Excellence
- Section 2: Impact
- Section 3: Implementation

Of the **maximum 10 pages** applied to sections 1, 2 and 3, applicants are free to decide on the allocation of pages between the sections. However, the overall page limit will be strictly applied: after the call deadline, **excess pages will automatically be made invisible, and will not be taken into consideration by the experts.**

It is the responsibility of the applicant to verify that the submitted PDF documents are readable and are within the page limit. PDF documents can contain colours.

Applicants will not be able to submit their proposal in the submission system unless **both** Parts 1 and 2 are provided **in PDF format** (Adobe version 3 or higher, with embedded fonts).

**NB:** The start page and table of contents are no longer part of the template.
Part B-2:

Part B-2 must contain sections 4-7 as described below. **No overall page limit** will be applied to this document, but applicants should respect the instructions given per section (e.g. in section 5, a maximum of one page should be used per beneficiary and one page per partner organisation).

- Section 4: CV of the experienced researcher (maximum length: 5 pages)
- Section 5: Capacities of the participating organisations (1 page for the overview and 1 page for each participating organisation)
- Section 6: Ethical aspects
- Section 7: Letter of commitment of the partner organisation (for GF only)
Approaching Proposal Submission

• Register in the Participant Portal and create an ECAS account

• The expectation is that the supervisor submits the proposal

• Get in touch with your research support office

• Add relevant contact people to the online application

• Submit early and often – latest version will be accepted

• Keep the Guide for Applicants in front of you
LUNCH BREAK!
Individual Fellowships (IF)

Proposal evaluation
Become an evaluator!

News

H2020 call for expression for interest for experts (11/2013)
New calls for expression of interest for individual experts and for organisations to suggest experts were just published in OJ C342 of 22 November 2013. European Commission will soon need experts to evaluate first Horizon 2020 proposals. Don’t forget to tick the H2020 box in the registration platform and update your expertise.

Experts

Join the database of independent experts for European research and innovation.

The European Commission appoints independent experts to assist with research and innovation assignments including the evaluation of proposals, monitoring of projects, and evaluation of programmes, and design of policy.

New experts

Who can be an expert?

You have a chance of being selected as an expert if you:

• have high-level of expertise in the relevant fields of research and innovation (see call for details on types of expertise).
• can be available for occasional, short-term assignments

What do expert assignments involve?

Experts, as peer reviewers, assist in the:

• evaluation of proposals
• monitoring of actions

In addition, experts assist in the:

• preparation, implementation or evaluation of programmes and design of policies.
# European Fellowships – 2014 Call

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<th>Success Rate %</th>
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# Global Fellowships – 2014 Call

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## European Fellowships – 2015 Call

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## Global Fellowships – 2015 Call

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## European Fellowships – 2016 Call

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## Global Fellowships – 2016 Call

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# European Fellowships – 2017 Call

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<th>Retained List Threshold</th>
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## Global Fellowships – 2017 Call

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<tr>
<td>SOC</td>
<td>92.4</td>
<td>90.8</td>
<td>17.4</td>
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IF-EF 2017: Funded proposals per action

Source: European Commission
IF-GF 2017: Funded proposals per action

Source: European Commission
IF-GF 2017: Funded proposal per country (outgoing phase)

Source: European Commission
IF-GF 2017: Funded proposal per country (return phase)

Source: European Commission
Research Age (all years so far)

Source: European Commission
Research Age (all years so far)

![Researcher Age - Success Rate](image)

Source: European Commission
Experience of Researchers (all years so far)

Source: European Commission
Experience of Researchers (all years so far)

PhD - Success Rate (all years)

Source: European Commission
Resubmissions 2016

Source: European Commission
## IF 2018 Call Information

<table>
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<tr>
<th>Indicative budget</th>
<th>€273M</th>
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<tr>
<td>Publication date</td>
<td>12 April 2018</td>
</tr>
<tr>
<td>Call deadline</td>
<td>12 September 2018 (17:00 Brussels time)</td>
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<tr>
<td>Evaluation of proposals</td>
<td>October-February 2019</td>
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<tr>
<td>Evaluation Outcome</td>
<td>February 2019</td>
</tr>
<tr>
<td>Signing of Grant Agreement</td>
<td>March-June 2019</td>
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</table>

- **Up to 5 months**
  - 1-stage submission

- **3 months**
  - Feedback Report (ESR)
Evaluation Process

1. Proposal Submission
   - Via Participant Portal
   - Admissibility/eligibility checks

2. Remote Evaluations
   - At least 3 evaluators
   - Individual reports produced
   - ~24 proposals per evaluator

3. Remote Consensus Meetings
   - Consensus reports produced
   - Agreement on comments/score

4. Ranked list of proposals
   - Lists by panel
   - Projects funded in priority order until budget is exhausted

Max. 5 Months to Outcome!
**IF evaluation and scoring**

<table>
<thead>
<tr>
<th>Marie Skłodowska-Curie Innovative Training Networks</th>
<th>Excellence</th>
<th>Impact</th>
<th>Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scored on a scale of 0-5</td>
<td>50%</td>
<td>30%</td>
<td>20%</td>
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<td>2</td>
<td>3</td>
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<tr>
<td>Priority in case of ex aequo</td>
<td></td>
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<tr>
<td>Overall threshold of 70% applies to total score</td>
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</tbody>
</table>

- Though threshold is 70% - competitive proposals need to aim at a score of 90+%!
- Evaluation summary reports provided as feedback to applicants along with score and funding decision
- No restrictions on re-application, but applicants discouraged from making references to previous evaluation results
Resubmissions and similar H2020 IF projects

- **Resubmission** = same supervisor, same host institution, same researcher (in 2016 and 2017 calls)
- Needs to be indicated in the proposal
- Evaluators will receive a copy of the previous Evaluation Summary Report during the consensus phase (after the individual evaluations)
- Evaluation of the 2018 proposal is independent from previous submissions

- **Similar H2020 project** already receiving funding must be indicated in the proposal to avoid double funding
- In such cases evaluator will be assessing the originality and novelty of the proposal
Score Descriptors

0 – Proposal **fails** to address the criterion or cannot be assessed due to missing or incomplete information.

1 – **Poor.** The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 – **Fair.** Proposal broadly addresses the criterion, but there are significant weaknesses.

3 – **Good.** Proposal addresses the criterion well, but a number of shortcomings are present.

4 – **Very Good.** Proposal addresses the criterion very well, but a small number of shortcomings are present.

5 – **Excellent.** Proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

- Application form reflects evaluation criteria
- Each criterion scored between 0 and 5
- Decimal points can be awarded
IF evaluation criteria

• Excellence Evaluation Criteria
  – 1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary aspects and gender aspects
  – 1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host
  – 1.3 Quality of the supervision and of the integration in the team/institution
  – 1.4 Capacity of the researcher to reach and re-enforce a position of professional maturity/independence

+ 
– Section 4 - CV of the Experienced Researcher
1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary aspects and gender aspects

- Aims of the Research Project:
  - Have clear, focused research objectives and provide overview of the project;
  - Make it clear why the project is novel, ground breaking or cutting edge in the area (in the context of the up-to-date state-of-the-art);
  - Detail the planned methodology and approach;
  - Highlight the impact of the project;
  - What will be its contribution and how will it advance the area;
  - Highlight all inter- and multidisciplinary aspects;
  - Detail gender aspects relevant to the research content where appropriate;
  - Explain how the project will open up career and collaboration opportunities for the researcher and host.

- Make it accessible:
  - Evaluators will be experts, but maybe not down to the level of detail you are;
  - Bring the project to life and ensure it is easy to follow – use clear language and include diagrams, images, tables if appropriate.
1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host

- Two-way interaction between researcher and host(s):
  - What new knowledge and skills will the researcher develop;
  - What existing knowledge and skills will the researcher bring to the host(s).

- Training-through-research:
  - The research project makes up the focus of the Fellowship, but should be framed in the context of training for the researcher;
  - In particular, in terms of multi/interdisciplinary expertise, intersectoral experience and transferable skills;
  - Other training examples include: financial management; communication/outreach skills; and develop expertise in IPR;
  - For Global Fellowships, identify how the skills/knowledge gained during the outgoing phase in TC will be transferred back to Europe.

Secondments strongly encouraged!
1.3 Quality of the supervision and of the integration in the team/institution

- Qualifications and experience of the supervisor(s) (both for GF):
  - Include evidence that the supervisor is suitably qualified/experienced to ensure the success of the Fellowship on the research topic;
  - For example, participation in projects, publications, patents, relevant results, international collaborations and experience supervising (no. postdocs mentored);
  - If other colleagues will provide mentoring, describe it.

- Hosting arrangements, in terms of integrating the Fellow:
  - Measures to ensure the successful integration of the Fellow and transfer of knowledge/skills;
  - Is there an institutional Research Development Strategy? If so, describe it;
  - Consider what the Career Development Plan would look like;
  - For Global Fellowships describe both phases and their interconnectivity.

European Charter for Research
1.4 Capacity of the researcher to reach and re-enforce a position of professional maturity/independence

- Show that the candidate has an excellent track record given their career status: e.g. publications, patents, conference papers, chapters, monographs;
- Highlight all relevant experiences, including teaching, supervision, or work with industry/non-academic partners;
- Use the CV for reference to help with space, but bring out and detail major relevant achievements;
- Convince the evaluators that the researcher is right for the Fellowship project and that they will develop and grow during the training:
  - Clear outcome of the Fellowship, e.g. attain leading independent position or resuming research career after a break;
  - Demonstrate the capacity for independent thinking and leadership;
  - Explain how the Fellowship will have an enormous positive impact on the researcher’s career.
The methodological approaches are state of the art and original. Their application is clearly described and very well justified for each objective.

The research is novel and highly credible considering the supervisor’s experience.

The relevant training objectives benefitting the further development of an independent research career have been articulated in detail.

The potential of the applicant to acquire new knowledge and skills through the fellowship has been very well identified and justified.

The supervisor has established networks of international collaborations and demonstrates a good capacity to mentor advanced researchers.

Details have been provided, including publications, talks and grants indicating that the experienced researcher already has a significant level of independent thinking, leadership quality and communication skills.

The future fellow has a skill in securing travel grants from a variety of organisations that facilitated the participation at professional events in many different countries during the PhD.

The proposal is very explicit regarding the ways in which the host institution will benefit from the relevant expertise of the researcher. The proposal also elaborates substantially on the transfer of knowledge, providing a list of training and skills that the researcher will acquire during the fellowship.
Excellence: negative feedback

- The methodological approach provided in the proposal is not convincingly developed and discussed in relation to the objectives

- *It is not made clear how the preliminary data justifies the credibility of the main hypothesis*

- The research objectives are not described in sufficient detail

- *The project does not sufficiently detail the estimation of the number of selected samples and their statistical significance*

- The provisions for mentoring at the outgoing host are treated superficially

- *How the supervision will be conducted (e.g., frequency of meetings, amount of time and availability of supervisors etc.) is not clearly presented.*

- The hands-on training activities for developing transferable skills are mentioned but not developed

- *The match between the researcher’s profile and the proposed work is not substantial*

- Insufficient information is provided on supervisor’s qualifications and experience

- *Measures for integrating the researcher in the host institution are too broadly described*

- There is little explanation of how the proposal would enable the fellow to improve their professional maturity

- *Although the researcher has a good number of conference papers, the number of publications in peer-reviewed journals is limited, weakening the potential of re-enforcing a position of professional maturity in research*
**IF evaluation criteria**

- **Impact**
  - 2.1 Enhancing the potential and future career prospects of the researcher after the fellowship
  - 2.2 Quality of the proposed measures to **exploit** and **disseminate** the action results
  - 2.3 Quality of the proposed measures to **communicate** the project activities to different target audiences

<table>
<thead>
<tr>
<th>RESEARCHER LEVEL</th>
<th>ORGANISATION LEVEL</th>
<th>SYSTEM LEVEL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased set of research-related and transferable skills to improve employability and career prospects both in and outside academia</td>
<td>Enhanced cooperation and stronger networks</td>
<td>Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe</td>
</tr>
<tr>
<td>Increase in higher impact R&amp;I output, more knowledge and ideas converted into products and services</td>
<td>Better transfer of knowledge between sectors and disciplines</td>
<td>Strengthen Europe's human capital in R&amp;I with better trained and entrepreneurial researchers</td>
</tr>
<tr>
<td>Greater contribution to the knowledge-based economy and society</td>
<td>Boosting of R&amp;I capacity among participating organisations</td>
<td>Better communication of R&amp;I results to society</td>
</tr>
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<td>Increase in Europe's attractiveness as a leading destination for R&amp;I</td>
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<tr>
<td></td>
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<td>Better quality R&amp;I contributing to Europe's competitiveness</td>
</tr>
</tbody>
</table>
2.1 Enhancing the potential and future career prospects of the researcher

- Detail the expected impact of the Fellowship (training and research) on the researchers career **after** the Fellowship:
  
  - What are the researcher’s professional goals and how will the Fellowship contribute;
  - Experience of a new country, culture and way of thinking;
  - Development of **new skills**, including those which are transferable;
  - New experiences in new sectors through secondments, for example;
  - Specify new competences that will be acquired (‘**better trained and entrepreneurial researcher**’).

- Be precise as to how this will all be achieved through the project
2.2 Quality of the proposed measures to exploit and **disseminate** the action results

- Ensure dissemination of results are appropriately targeted to peers, e.g. scientific or industry community. Describe the planned dissemination and exploitation activities:
  - How will research results be transferred to potential users, scientists, society?
  - If appropriate, present commercialisation plans, consider IPR arrangements

- Concrete planning for dissemination and exploitation should be included in the Gantt Chart.

### Explain how Dissemination feeds into Exploitation

| Sharing research results with potential users - peers in the research field, industry, other commercial players and policymakers | Using results for commercial purposes or in policymaking |

**European Charter for Research**

**Marie Curie Outreach Guidance**

**Online Manual – Dissemination & Exploitation**
2.3 Quality of the proposed measures to **communicate** the project activities to different target audiences

- Prepare a detailed **communication strategy** and timeline (include in in the Gantt Chart) – to create awareness of the performed research
- Have clear communication goals, objectives and defined audiences
- Use the right medium and means, if possible use dissemination partners and multipliers
- Go beyond the ‘obvious’ – what's the relevance to citizens’ everyday lives?
- How will the Fellowship contribute to a European ‘**Innovation Union**’ accounting for public spending?
- Don’t forget the **European Researchers’ NIGHT** events (September every year)

---

**Public Engagement**

Researchers should ensure that their research activities are made known to society at large in such a way that they can be understood by **non-specialists**, thereby **improving the public's understanding of science**. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns.

---

**Online Manual – Communicating your Project**

**Communicating EU research and innovation guidance for project participants**
Dissemination of results - Open Access

Obligation to provide open access when publishing and to research data (pilot and opt-out available)

Source: European Commission
The following applies for all calls with an opening date on or after 26/07/2016:

- Grant beneficiaries under this work programme part will engage in research data sharing by default, as stipulated under Article 29.3 of the Horizon 2020 Model Grant Agreement (including the creation of a Data Management Plan). Participants may however opt out of these arrangements, both before and after the signature of the grant agreement. More information can be found under General Annex L of the work programme.

Foresee a Research Data Management Plan as delivery of the project in month 6

Extended Open Research Data Pilot in Horizon 2020

If selected, applicants will by default participate in the Pilot on Open Research Data in Horizon 2020, which aims to improve and maximise access to and re-use of research data generated by actions.

However, participation in the Pilot is flexible in the sense that it does not mean that all research data needs to be open. After the action has started, participants will formulate a Data Management Plan (DMP), which should address the relevant aspects of making data FAIR — findable, accessible, interoperable and re-usable, including what data the project will generate, whether and how it will be made accessible for verification and re-use, and how it will be curated and preserved. Through this DMP projects can define certain datasets to remain closed according to the principle "as open as possible, as closed as necessary". A Data Management Plan does not have to be submitted at the proposal stage.

Furthermore, applicants also have the possibility to opt out of this Pilot completely at any stage (before or after the grant signature). In this case, applicants must indicate a reason for this choice (see options below).

Please note that participation in this Pilot does not constitute part of the evaluation process. Proposals will not be penalised for opting out.

We wish to opt out of the Pilot on Open Research Data in Horizon 2020.  

Further guidance on open access and research data management is available on the participant portal:  

Open Access in Horizon 2020

Open access to scientific peer reviewed publications has been anchored as an underlying principle in the Horizon 2020 and is explained in the Regulation and the Rules of Participation as well as through the relevant provisions in the grant agreement (2) see Article 29 “Dissemination of results - Open Access - Visibility of EU funding: pages 50-63 of the Multi-beneficiary General Model Grant Agreement, Version 1.0, December 11, 2013” as well as exceptions for confidentiality (article 36), security (article 37), personal data (article 39).

Are you supposed to deposit? > What to deposit > Where to deposit > When to deposit

Open access to research data: the Open Research Data Pilot

A novelty in Horizon 2020 is the Open Research Data Pilot which aims to improve and maximise access to and re-use of research data generated by projects. It will be monitored with a view to developing the European Commission policy on open research data in future Framework Programmes.

Are you supposed to deposit? > What to deposit > Where to deposit > When to deposit

Useful Resources

www.openaire.eu
FOSTER – EU-funded project on Open Science

https://www.fosteropenscience.eu/
Horizon 2020 IPR

- For further information see: [www.iprhelpdesk.eu](http://www.iprhelpdesk.eu)

- Horizon 2020 IPR Helpdesk (advice, events, articles, webinars)

IPR Helpdesk – IP in MSCA Factsheet:
Impact: positive feedback

- The fellowship is likely to have an excellent impact on the career prospects of the researcher
- …excellent potential for a long-term collaboration between the outgoing and return host.
- The proposed project is likely to have a substantial contribution to the European excellence and European competitiveness
- *The applicant will have the opportunity to teach and supervise PhD students*
- The host organization will benefit from previous experience of the researcher both regarding technical aspects of the project and also from his future vision; it is very likely that the project will improve the host institutes reputation in the field XX.
- *The planned secondment would foster communication and knowledge transfer between practitioners and the researcher.*
- The researcher presents a satisfactory strategy to disseminate and communicate results. They clearly identify different audiences that could benefit from results. They provide a comprehensive list of actions in order to reach each one of the targeted audience.
- *Intellectual property rights are well thought out and clearly presented.*
Impact: negative feedback

- The project has limited socio-economic value.
- *The impact of the scientific outputs has not been sufficiently demonstrated.*
- IPR issues are not sufficiently addressed by the proposal
- *There is not sufficient evidence in the proposal of any planned outreach activities for the return phase.*
- The cutting edge technologies and acquired skills mentioned seem already pre-existing and part of ongoing work
- *The participation of the fellow and the host laboratory in outreach activities for the general public and society's engagement is limited.*
- The communication measures are mostly limited to participation in a number of events that are not specifically related to the project.
- *The descriptions of the communication, dissemination and research results exploitation plans are insufficiently detailed. The researcher only presents generic ideas and there is incomplete information on a publication plan and the organisation of a workshop.*
- Aspects relating to exploitation of IP are not convincingly approached.
- *The volume and extent of activities to reach various target audience are insufficiently detailed.*
IF evaluation criteria

- **Implementation - Design the proposal to achieve the desired impact**
  - 3.1 Coherence and effectiveness of the work plan and appropriateness of the allocation of tasks and resources
  - 3.2 Appropriateness of the management structure and procedures, including risk management
  - 3.3 Appropriateness of the institutional environment (infrastructure)
3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

- The project Work Plan should be clear and realistic and show how the desired impacts will be achieved;
- Include a Gantt Chart as given in application example using time elapsed by month to show:
  - Work Packages titles (for EF there should be at least 1 WP);
  - List of major deliverables (outputs);
  - List of major milestones (control points);
  - Secondments (if applicable).
- Work Packages can be included for all activities, i.e. research, management, training.
- Explain how the work plan and resources mobilised will ensure success
- Explain why the amount of person-months is appropriate to achieve the objectives
This is an example Gantt chart only.

Notes:
- The titles of the WP’s indicated here do not have to be strictly followed or included in the Gantt chart for your specific proposal. Adapt as needed.
- The number of WPs provided here is an example only. Add or remove WP's as needed.
- Remove any columns for a duration longer than that of your proposal.
- Add as much detail as needed for your proposal.

<table>
<thead>
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<th>Title</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
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<td></td>
<td>M71</td>
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</tbody>
</table>
3.3 Appropriateness of the **management structure and procedures**, including risk management

- Describe the organisation and management structure in place, including **progress monitoring** mechanisms, to ensure success

- What research/administrative risks might endanger the success of the project and what are the planned contingencies/mitigation measures (incl. support from HR or European offices)

- For entities with a capital or legal link to the beneficiary, what is their involvement and how will organisation/management and risk mitigation be addressed with them
3.4 Appropriateness of the institutional environment (infrastructure)

- Describe the infrastructure, logistics, facilities that will be available to the researcher and necessary to ensure the successful implementation of the project.
- Describe the active contribution of the beneficiary and partners (if appropriate) to the proposed research and training activities;
  - Why is it an appropriate place to conduct the Fellowship;
  - Do they have experience in the research field/hosting Fellows;
  - Demonstrate commitment by providing the researcher with that needed to successfully complete the Fellowship.

- Global Fellowships;
  - Similar description for the outgoing TC host;
  - TC Partners need to provide a letter of commitment (Part B, section 7) and details of what to include are in the guide for applicants.

NB: Each participant is described in Section 5. This specific information should not be repeated here!
The administrative arrangements and support for the hosting of the applicant are sufficiently outlined.  

The work plan of the project is comprehensively described. A contingency plan is included.

Research infrastructures of the host institution and the host laboratory are adequate to carry out the proposed project.  

The active contribution and commitment of the beneficiary and its scientist in charge is well documented.

Risk management is extensively presented, including contingency plans to be put in place should risk occur.  

The roles of the researcher and the supervisor in the project management are adequately described. The role of the host institution in the financial and administrative management of the project is also clearly demonstrated.

The secondment period is placed appropriately in the empirical analysis stage.

The complementarity between the participating organisations is very good.

The proposal stresses ample complementarity between skills and research experience of the participating organisations and those of the researcher. The researcher will participate in a research group within the host institution.

The researcher will become a staff member of the host department and will join the work of three research clusters.

The researcher will be supervised at regularly throughout the project by the supervisors of the host institution.
Management of the administrative tasks and financial aspects of the project are not clearly described.

*WPs are not adequately designed for the project implementation and are insufficiently explained.*

Deliverables are not focused enough and milestones are not clearly defined.

*There is not sufficient evidence of any planned outreach activities for the return phase.*

The bioinformatics and potential pitfalls and risks in analyses and interpretation of the data are not described in sufficient detail.

*The complementarity of the host lab and the company where the fellow will be seconded are not fully explained in the proposal.*

The timing of research and dissemination activities presented in the Gantt chart and descriptive part do not clearly correspond.

*Participation by the industry sector, although mentioned in the proposal, is not convincing.*

There is a lack of detail regarding the deliverables (e.g., topics and target journals, named conferences, specific tools and / or methods).

*There is not sufficient information provided regarding the advisory group and the way it will operate along with the main supervisor in the progress monitoring procedures of the project.*

The Gantt chart includes some numerical codes (1-4) that are not properly explained.
Part B – Section 4

- **5 pages** maximum!
- CV of Experienced Researcher (future Fellow)
- Applicants without a PhD:

- This table is beyond the 5-page limit of the CV

### Academic Qualifications counting towards the Total Full time postgraduate research experience

<table>
<thead>
<tr>
<th>University Degree giving access to PhD(^a)</th>
<th>Institution name and country</th>
<th>Date of award ((a))</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td>DD/MM/YYYY</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Other university degree(s)/master(s), if any, obtained after the award of the University Degree giving access to PhD:</th>
<th>Institution name and country</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>DD/MM/YYYY</td>
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<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Full time research experience</th>
<th>Proportion of research activities as a percentage of the duration of the Master</th>
<th>Duration of research activities expressed in months</th>
</tr>
</thead>
<tbody>
<tr>
<td>xx %</td>
<td>((b)^{10} = xx% \times \text{duration of Master})</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Doctorate:</th>
<th>Institution name and country</th>
<th>From</th>
<th>To (Date of expected Award)</th>
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<tbody>
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<td>DD/MM/YYYY</td>
<td>DD/MM/YYYY</td>
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</table>

<table>
<thead>
<tr>
<th>Full time research experience(^3)</th>
<th>Duration of research activities expressed in months</th>
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<tbody>
<tr>
<td></td>
<td>((c))</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other research activities counting towards the Total Full time postgraduate research experience</th>
<th>Institution name and country</th>
<th>From</th>
<th>To</th>
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<tbody>
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<td>DD/MM/YYYY</td>
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</table>

<table>
<thead>
<tr>
<th>Full time research experience</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>((d))</td>
</tr>
</tbody>
</table>

**Total Full time postgraduate research experience: Number of months**

\[-(b)\times(c)\times(d)\]

*Please make sure this data is consistent with the data inserted in part A of the proposal.*
### Part B – Section 5

**Operational capacity of the organisations**

<table>
<thead>
<tr>
<th>Participating organisation</th>
<th>Legal Entity Short Name</th>
<th>Country</th>
<th>Supervisor</th>
<th>Role of partner organisation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beneficiary</td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entity with a capital or legal link</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Organisation</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1 page for each role – choose one of:
- **beneficiary** (compulsory)
- entity with a capital or legal link to the beneficiary (optional)
- partner organisation for GF (compulsory for GF only)
- partner organisation for secondment (optional)

[Full name + Legal Entity Short Name + Country]

<table>
<thead>
<tr>
<th>General description</th>
<th>Academic organisation</th>
<th>Role and profile of key persons (supervisor)</th>
<th>Dept./Division / Laboratory</th>
<th>Key research facilities, Infrastructure and Equipment</th>
<th>Independent research premises?</th>
<th>Previous and current involvement in research and training programmes</th>
<th>Relevant publications and/or research/innovation products</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>(Yes / No) delete as appropriate</td>
<td>(names, title, qualifications of the main supervisor)</td>
<td></td>
<td>Demonstrate that the beneficiary has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to the recruited experienced researcher. If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and its role in the action in the following table.</td>
<td>Explain the status of the beneficiary's research facilities – i.e. are they owned by the beneficiary or rented by it? Are its research premises wholly independent from other entities? If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and describe the nature of the link in the following table.</td>
<td>Indicate up to 5 relevant EU, national or international research and training actions/projects in which the beneficiary has previously participated and/or is currently participating</td>
<td>(Max 5) Only list items (co-)produced by the supervisor</td>
</tr>
</tbody>
</table>
Part B – Section 5

• Operational capacity of the organisations
  – Use the tables efficiently to present information which can be referenced elsewhere in the proposal
  – Provide profile of key staff, description of key infrastructure or technical equipment, all partner organisations contributing towards the proposed work
  – Different information for beneficiary and partner organisations
  – **One page** limit person organisation
Part B – Section 6

- Ethics Issues
  - Self-assessment in Part A and strategy in Section 6 of Part B
  - Outside the 10 page limit – provide detailed strategy
  - Crucial for all research domains → need to identify any potential ethical issues and describe they will be addressed
  - All proposals considered for funding subject to Ethics Review
  - Read the Ethics Self-Assessment Guidelines
Letter of Commitment (GF only)

- For the Global Fellowship proposals, a letter of Commitment from the outgoing phase TC partner organisation must be included in part B-2 to ensure their real and active participation.

- GF Proposals which fail to include a letter of commitment of the partner organisation will be declared inadmissible.

- Minimum requirements for the letter of commitment:
  - heading or stamp from the institution;
  - up-to-date (may not be dated prior to the call publication);
  - the text must demonstrate the will to actively participate in the (identified) proposed action and the precise role.

- Please note that no template for these letters is provided, only general rules.
Marie Skłodowska-Curie actions endorse the Horizon 2020 Responsible Research and Innovation (RRI) cross-cutting issue, engaging society, integrating the gender and ethical dimensions, ensuring the access to research outcomes and encouraging formal and informal science education.

All applicants to the MSCA calls are encouraged to adopt an RRI approach into their proposals.”

Rome Declaration on Responsible Research and Innovation in Europe, November 2014

Report from the Expert Group on Policy Indicators for Responsible Research and Innovation

Open Science
Gender Aspects

• Don’t underestimate gender aspects (gender experts in all Evaluation Panels) now explicit evaluation criteria!

• Relate to EU policies on Gender Equality – cross-cutting priority in Horizon 2020:
  – Equal opportunities (among seconded staff and decision-makers/supervisors)
  – Gender dimension in the research content (e.g. subjects or end-users)
  – Gender dimension in project management and networking activities
Gender Aspects - Links

- **Gendered Innovation**, Stanford University project: https://genderedinnovations.stanford.edu/
  - practical tools for researchers: methods to be used in a research project; case studies; checklist


Understanding gender dimension for MSCA projects

This video will explain you what gender dimension in research is about and give you examples of how it can be integrated within your research project and improve the quality of your research.

UN Sustainable Goals in MSCA Work Programme 2018 - 20

Submission Trends

IF - highest submission rate in H2020 during 2014 – submit early!
Closing Thoughts...

- Set aside enough time
- Clarify your own goals for applying
- Read all Call documentation (i.e. Guide for Applicants and Work Programme) and consider any relevant EU policy documents
- Fully appreciate the evaluation criteria - think IMPACT!
- Help evaluators (success is in the detail!)
  - Address well the main objectives
  - Use clear and concise language
  - Explain country specific jargon
  - Provide them with the evidence they need
- Discuss with and meet your planned supervisor/fellow
- Research previous and current projects, particularly those in your area
- Find colleagues to proof read the drafts with the evaluation criteria in hand
Abstract – Have a story to tell…

• Make the relevance very clear
• Clearly but shortly explain what you are going to do
• Highlight impact

~ EU impact? Knowledge gap? Why your project? Why now?

Overall presentation matters…

• Use tables, colours, graphs and schematic representations of concepts & information you want them to see and understand (this takes time...)
• Check consistency across the whole proposal
• Avoid repetition, highlight key information
• Use the Gantt Chart well
Key Messages from Today

MSCA is not only a research project – *training-through-research*!

Put yourself in the shoes of the evaluators – *make their life easy*...

The Guide for Applicants – *don’t let it out of your sight*!
MSCA Useful Links

- Individual Fellowship Call 2018

- Horizon 2020/MSCA website
- Commission’s Marie Curie Actions website (mainly FP7 still)
  ec.europa.eu/research/mariecurieactions

- European Charter for Research
  http://ec.europa.eu/euraxess/index.cfm/rights/europeanCharter

- Marie Curie Guidance for Outreach

- IPR Helpdesk – IP in MSCA Factsheet: