Marie Skłodowska-Curie Actions
Individual Fellowships Information Webinar:
Submission and Evaluation

5 May 2020
mariecurie-uk@ukro.ac.uk
About UKRO

Mission

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

Our office

• Based in Brussels
• EU office of UK Research and Innovation (UKRI)
• Delivers subscription-based advisory services for around 140 research organisations in the UK and beyond

Content Presented 5 May 2020
About the presenters

Speaker

• Dr Branwen Hide
  – Senior European Advisor and MSCA NCP

Expert Evaluator

• Dr Pierre Purseigle
  – Associate Professor, University of Warwick

Moderator

• Dr Sarah Ashwood
  – European Advisor and MSCA NCP

Content Presented 5 May 2020
UKRO webinars – House Rules

- UKRO is making use of **Zoom** for their Webinar Content.
- All **participants will be muted** for the duration of the webinar.
- Use the **Q&A Function to ask questions** – **Not the Chat**.
- You can ‘up vote’ your favorite questions
- Any unanswered questions will be followed up
- Presentation slides **will be made available** on the UKRO Portal; **we are recording the webinar**.
- Email with links to slides and feedback questionnaire will be sent after the webinar.

Content Presented 5 May 2020
MSCA Individual Fellowships Overview

• UK Eligibility post EU-Exit

• Individual Fellowships 2020
  – Brief overview of the scheme
  – Submission Process
  – Evaluation Criteria
  – Proposal development tips

• Individual Fellowship Expert Evaluator Experience

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**Individual Fellowships**

**ID:** MSCA-IF-2020

**Type 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:** 08 April 2020

**Deadline:** 09 September 2020 17:00:00 Brussels time

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**Content Presented 5 May 2020**
UK Participation Post-EU Exit
MSCA Individual Fellowships 2020
The **Withdrawal Agreement (WA)**, as agreed between the European Union and the United Kingdom, entered into force on 1 February 2020.

The WA means that the UK can **continue to participate in EU programmes**, including Horizon 2020, that are financed by the 2014-2020 Multiannual Financial Framework (MFF) until their closure (i.e. for the lifetime of grants).

UK participants will continue to receive EU grant funding for the lifetime of individual Horizon 2020 projects, including projects awarded and finishing **after the transition period ends** at the end of 31 December 2020.

UKRO factsheet with links to all major publications available at [www.ukro.ac.uk](http://www.ukro.ac.uk)
How will Brexit impact the Marie Skłodowska-Curie Actions?

The Withdrawal Agreement foresees that the UK will continue to participate in the current 2014-2020 EU programmes, including Marie Skłodowska-Curie Actions, as if the UK was an EU Member State until the closure of the programmes.

https://ec.europa.eu/research/mariecurieactions/brexit-impact_en

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Marie Skłodowska-Curie Actions (MSCA)

Overview
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)**

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Marie Skłodowska-Curie Actions Individual Fellowships (IF)

MSCA-IF-2020 Call
Key Features

- Individual grant for **Experienced Researchers** to support *mobility, research projects and training*

- **Intersectoral**: Opportunity to gain new knowledge in and outside academia

- **International**: Opportunities both within and beyond Europe

- Defined **eligibility criteria** but no nationality, age or career stage restrictions

- **Responsible Research and Innovation** (RRI) approach to proposals

- Beneficiaries and researchers must follow the **European Code of Conduct for Research Integrity**

- Working conditions in line with **The European Charter for Researchers** and **The Code of Conduct for Recruitment** as outlined in the **Information package for Marie Skłodowska-Curie Fellows**

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Individual Fellowships

**European Fellowships**
(12-24 months)

- Any Country
- Move to MS/AC
- Move Country
- MS/AC

From any country to MS/AC
*Must not have lived >12 months of last 36 months in that MS/AC*

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

- MS/AC
- Third Country
- MS/AC

MS/AC citizen/long term resident to Third Country + plus mandatory return phase in any MS/AC
*Must not have lived >12 months of last 36 months in that third country*

**Panels**
- Standard Panel
- Society and Enterprise
- Career Restart Panel (CAR)
- Reintegration Panel (RI)

**Global Fellowships Panel**

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## Call Timeline

<table>
<thead>
<tr>
<th>Action</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Invitation to Submit Proposal</td>
<td>8 April 2020</td>
</tr>
<tr>
<td><strong>Deadline for Submission</strong></td>
<td>9 September 2020 17:00 Brussels Time</td>
</tr>
<tr>
<td>Evaluation of Proposals</td>
<td>October - December 2020</td>
</tr>
<tr>
<td>Information on Outcome of Evaluations</td>
<td>February 2021</td>
</tr>
<tr>
<td>Indicative Date for Signing the Grant Agreement</td>
<td>February - March 2021</td>
</tr>
<tr>
<td>Prospective Start Date</td>
<td>March 2021 - September 2022</td>
</tr>
</tbody>
</table>

*Submit Early, Submit Often*

*Commission collects proposals at Deadline*
Application Process

MSCA-IF-2020 Call
Approaching Proposal Submission

Register in the [Funding & Tender Opportunities Portal](#) and create an [ECAS account](#)

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!!!

**Call Name:** Marie Skłodowska-Curie Individual Fellowships Call ID:H2020-MSCA-IF-2020

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Under call H2020-MSCA-IF-2020, topic MSCA-IF-2020, why should a researcher not submit the proposal on his/her own?

- Because the legal responsibility lies with the host organisation in a Member State or Associated Country (future beneficiary) and only the supervisor, appointed by this organisation, can act on its behalf until the signature of the Grant Agreement.
- As such, only the supervisor should press the "submit" button and take any other actions in the name of the organisation (e.g. initiate the "review process" that replaces the redress procedure for Horizon 2020) until the Grant Agreement is signed.
- However, the electronic submission system will still allow the researcher to submit the proposal. He/she should consider the implications of this carefully before doing so.
Submission

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Part A: Administrative Forms – on-line only

Part B: Template available to download

Parts B: PDF to be uploaded
Part A – Administrative Forms

Annex 3 – How to complete the Proposal Submission Forms (Part A) of the proposal

Horizon 2020
Call: H2020-MSCA-IF-2020
( Marie Skłodowska-Curie Individual Fellowships )

Topic: MSCA-IF-2020
Type of action: MSCA-IF-EF-ST
(Standard European Fellowships)
Proposal number: SEP-210672201
Proposal acronym: test EF
Deadline Id: H2020-MSCA-IF-2020

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<table>
<thead>
<tr>
<th>Section</th>
<th>Title</th>
<th>Action</th>
</tr>
</thead>
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<tr>
<td>1</td>
<td>General information</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Participants &amp; contacts</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Budget</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Impact</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Call-specific questions</td>
<td></td>
</tr>
</tbody>
</table>

How to fill in the forms:
The administrative forms must be filled in for each proposal using the templates available in the submission system. Some data fields in the administrative forms are pre-filled based on the steps in the submission wizard.
2 - Administrative data of participating organisations

- Supervisor

- Researcher
5 - Call specific questions

Standard Fellowship

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

2. Did you spend time on procedures for obtaining refugee status (according to the 1951 Geneva Refugee Convention and the 1967 Protocol) in a Member State or Associated Country? [ ] 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 disseminating in 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

Is there a secondment in Member States or Associated Countries envisaged in Part B of this proposal? [ ] Yes [ ] No

Global Fellowship

5 - Call specific questions

Eligibility Researcher (future fellow)

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

2. Did you spend time on procedures for obtaining refugee status (according to the 1951 Geneva Refugee Convention and the 1967 Protocol) in a Member State or Associated Country? [ ] 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 disseminating 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

Is there a secondment in Member States or Associated Countries envisaged in Part B of this proposal? [ ] Yes [ ] No

Attention: this secondment is different to the ongoing phase in the Third Country and only takes place in Member State / Associate Country!!!

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Where do you add Partner Organizations?

Global Fellowships: Step 4 Parties

- Number of participants: 1
- Add Partner
- Consortium eligibility
- You should add 1 partner organisation from a Third Country Call requires at least 1 Partner organisation.

- Applicant (FUTURE BENEFICIARY)
- Contact

UKRI

UNITED KINGDOM RESEARCH AND INNOVATION
POLARIS HOUSE NORTH STAR AVENUE, SN2 1FL
SWINDON, UK
FIC: 506446474

Change Organisation  Contact organisation

Secondments: Section 5

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

- Applicant Secondments

- Proposal Submission Forms

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

Do you already know the organisation to which this secondment will be?

- Yes  No

<table>
<thead>
<tr>
<th>Participating organisations</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>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Entity with a capital or legal link</td>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Partner Organisation</td>
<td>- NAME</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Part B - The Proposal

- Min. font size 11 *
- All margins at least 15 mm
- Tables are only for illustrating the core text of the proposal. (Should not contain the core text itself)
- The page formatting will be systematically checked by the REA.
- Footnotes are for literature references ONLY.
- Information provided through hyperlinks will be disregarded.

* Except for the Gantt chart, tables and footnotes (min. font size 8)
Part B – What does it Include?

Templates
• Make sure you download the 2020 Templates
• Include all mandatory tables
• Respect the page limits

Part B1
• Max length is 10 pages
• Section 1: Excellence
• Section 2: Impact
• Section 3: Implementation

Part B2
• No overall page limit (but indicative lengths for the different sections)
• Section 4: CV of the Fellow
• Section 5: Capacities of the participating organisations
• Section 6: Ethics
• Section 7: Letter of commitment (for GF only)
Letter of Commitment

**ONLY** for partner organisations in a third country hosting the outgoing phase of a Global Fellowship

The letter must be **up-to-date** and on headed paper

It should confirm real and active participation in the proposed action

General guidelines are given – no template

They can take time to get signed

Global Fellowship proposals which fail to include a letter of commitment of the partner organisation will be declared inadmissible

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Evaluation Criteria

MSCA-IF-2020 Call
## Evaluation Criteria

<table>
<thead>
<tr>
<th>Excellence (50%)</th>
<th>Impact (30%)</th>
<th>Implementation (20%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and credibility of the research/innovation project; level of novelty,</td>
<td>Enhancing the future career prospects of the researcher after the fellowship</td>
<td>Coherence and effectiveness of the work plan, including the appropriateness of the</td>
</tr>
<tr>
<td>appropriate consideration of inter/multidisciplinary and gender aspects</td>
<td></td>
<td>allocation of tasks and resources</td>
</tr>
<tr>
<td>Quality and appropriateness of the training and of the two way transfer of</td>
<td>Quality of the proposed measures to exploit and disseminate the project results</td>
<td>Appropriateness of the management structure and procedures, including risk management</td>
</tr>
<tr>
<td>knowledge between the researcher and the host</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Quality of the supervision and of the integration in the team/institution</td>
<td>Quality of the proposed measures to communicate the project activities to</td>
<td>Appropriateness of the institutional environment (infrastructure)</td>
</tr>
<tr>
<td></td>
<td>different target audiences</td>
<td></td>
</tr>
<tr>
<td>Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Weighting (Priority in case of proposals with the same score (ex aequo))**

1  
2  
3
Excellence

1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary aspects and gender aspects
   - 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 context of the up-to-date state-of-the-art);
   - Detail the planned methodology and approach
   - Highlight the impact of the project - how will it advance the research field
   - 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

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 (transfer of knowledge) between the research and the host (and partner organisations if application)
   - 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
   - Global Fellowships, identify how the skills/knowledge gained will be transferred back to EU Host
Excellence con’t

• **1.3 Quality of the supervision and of the integration in the team/institution**
  – Qualifications and experience of the supervisor(s)
  – Include evidence that the supervisor is suitably qualified/experienced to ensure the success of the Fellowship on the research topic (e.g. participation in projects, publications, patents, relevant results, international collaborations and no. postdocs/PhD students mentored etc.)
  – If other colleagues will provide mentoring, describe it.
  – Hosting arrangements - include the measures to ensure the successful integration of the Fellow and transfer of knowledge/skills (e.g. is there an institutional Research Development Strategy, consider what the Career Development Plan would look like etc.).
  – For Global Fellowships describe both phases and their interconnectivity

• **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;
  – Clearly demonstrate that the researcher is right for the Fellowship project and that they will develop and grow during the training
  – Explain how the Fellowship will have an enormous positive impact on the researcher’s career (e.g. attain leading independent position or resuming research career after a break)
  – Demonstrate the capacity for independent thinking and leadership
Impact

• **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 to them
    • 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’).
  – Explain how this will all be achieved throughout the project

• **2.2 Quality of the proposed measures to exploit and disseminate the action results**
  – Concrete planning for dissemination and exploitation should be included in the Gantt Chart.
  – Explain how Dissemination feeds into Exploitation
  – 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

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Impact

• **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 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)
  – EC [Communicating Your Project](#) and [Communicating EU research and innovation guidance for project participants](#)
Implementation

- **3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources**
  - Explain how the work plan and resources mobilised will ensure success
  - Explain why the amount of person-months is appropriate to achieve the objectives
  - Work Packages can be included for all activities, i.e. research, management, training.
  - The Work Plan should be clear and realistic and show how the desired impacts will be achieved;
  - Include the Gantt Chart specified in the application

- **3.2 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
Implementation

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 third country host
Proposal Advice

MSCA-IF-2020 Call
Proposal Advice

Key points

This is the supervisor (PI) grant
Both the PI & the Fellow are involved in writing the proposal
Fellow should have a strong CV (in relation to their career stage)
Read all call documentation and the evaluation criteria
Consider any relevant EU policy documents
Make it easy for the evaluators to find the information
Evaluators will be experts, but not necessarily in your exact area
Use clear and concise language
Explain country/research area specific jargon
Include diagrams, images, tables if appropriate
Meet your planned supervisor/fellow (virtual or otherwise)
Research previous and current projects
Find colleagues to proof read drafts with the evaluation criteria
Best proposals have input from Fellow, Supervisor and Host intuition
The proposal will take time to write

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Read the **Guide For Applicants**

The Guide for Applicants is crucial – *don’t let it out of your sight!*

It provides all eligibility criteria, proposal structure and financial rules

Gives assessment criteria and process overview
Additional Information

- **MSCA 2018-2020 Work Programme**
- **2020 Guide for Applicants**
- **MSCA 2020 Call** – Funding & Tender Opportunities Portal
- **NET4Mobility+** Network of MSCA NCPs
  - Individual Fellowship Webinar

- **H2020 Annotated Model Grant Agreement**
- **Marie Curie Alumni Association**
- **EURAXESS**
- **EURAXESS REFEX (Career Development App)**

UK NCP Helpdesk
Email: mariecurie-uk@ukro.ac.uk
Website: www.ukro.ac.uk/mariecurie

Content Presented 5 May 2020
UKRO MSCA Webinars
MSCA Individual Fellowships 2020

**Session 1: Overview and Eligibility Criteria**
Overview of the Individual Fellowship Scheme, eligibility criteria and funding

**Session 2: Practical matters**
Things to consider when developing your project
(secondments, short visits, Part time working, Gender, Dissemination and exploitation)

**MSCA NCP Drop In Sessions**
an opportunity to speak directly with the MSCA NCP.
10:00-11:30 UK Time, 6 May 2020 and 13:30-15:00 UK Time, 27 May 2020

[www.ukro.ac.uk](http://www.ukro.ac.uk) for Details

UK NCP Helpdesk
[mariecurie-uk@ukro.ac.uk](mailto:mariecurie-uk@ukro.ac.uk)
Thank you!

Please use the Q&A Function to ask questions – Not the Chat