Marie Skłodowska-Curie Actions (MSCA) Drop-in Session

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About UKRO

Mission

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

Our office

• Based in Brussels
• European office of UK Research and Innovation (UKRI)
• Delivers subscription-based advisory services for around 140 research organisations in the UK and beyond
• Host the UK NCP European Research Council (www.ukro.ac.uk/erc, erc-uk@ukro.ac.uk)
• Hose the UK NCP Marie Skłodowska-Curie Action (www.ukro.ac.uk/mariecurie, mariecurie-uk@ukro.ac.uk)
About the presenters

**Speaker**
- Dr. Branwen Hide
- European Advisor and MSCA NCP

**Moderator**
- Dr. Andrew Macdonell
- European Advisor
### Call Timeline

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

Marie Skłodowska-Curie Actions

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
Secondments vs Short Stays

MSCA-IF-2020 Call
Secondment vs Short Stay

**Secondments**

- Host organisation must be located in a Member state or Associated Country
- Can be either in an academic or non-academic organisations (but not in the same organization)
- Encouraged as a tool for inter-sectoral experience, knowledge transfer and career development
- No mobility requirement but defined duration
- Quality and degree of involvement of partner organisations and the impact of the secondments will be assessed
- Organisation does not need to be identified in the proposal
  - The proposal contains as much information as possible on its overall purpose, sector, place, timing and duration
- Secondments have defined and agreed supervision arrangements at the secondment host
  - Planned in advance, and are an integral part of the research proposal

**Short Stay (research visits, filed work etc.)**

- No definition of ‘short stay’
- No defined duration, can take place anywhere including third countries
- Can take place and time of the fellowship
- NO defined supervisor arrangements at the place of the visit
- Can be planned in advance, or in line with the research and training needs of the fellow
- Should only represent a small part of the action
Other mentoring arrangements

• Based on the needs of the project can include additional individuals in mentoring/superiors role

• Can be located in the same intuition, or elsewhere

• Can be included here:
  – Quality of the supervision and of the integration in the team/institution
  – Appropriateness of the management structure and procedures, including risk management
  – Appropriateness of the institutional environment (infrastructure)
COVID-19
MSCA-IF-2020 Call
COVID-19 related contingency measures

- A short reference in the Risk Assessment, when needed, would be beneficial.
- Include any related plan ‘B’ – risk mitigation strategy.
- Important to keep in mind the start date of the action.
Applying for Additional Funding
MSCA-IF-2020 Call
Additional Funding

• The host institution or fellow can receive additional funding for equipment
  – But the same costs cannot reimbursed by both grants
  – the researcher cannot not receive income (personnel costs) than those received from the beneficiary (for activities carried out in the frame of the action)
    • Unless there is part time working arrangements
  – No double funding
  – EC FAQ dated 8 July 2020

• Same principle for OA, communication & dissemination, public engagement activities and travel
Evaluation and the CV

MSCA-IF-2020 Call
Evaluation

• Based on Excellent, Impact and Implementation
  – Process and criteria is set out in the guide for applicants
• There is no short listing as with UK national funding
• Evaluators
  – Will be experts but not necessarily expertise in your exact area of research
  – Like to use people that have experience with MSCA
  – Evaluators can spend between 3-5 hrs per applications from initial read through to writing the individual ESR, not including the time spent on the consensus report
  – They are under VERY tight deadlines

• CV of the researcher
  – Fellowships will be awarded to the most talented researchers as shown by the proposed research and their track record (Curriculum Vitae, section 4), in relation to their level of experience.
  – CV may also be relevant for other aspects of the evaluation. For example:
    • Capacity of the researcher to reach and re-enforce a position of professional maturity in research
    • Clarity and quality of transfer of knowledge/training for the development of the researcher in light of the research objectives
CV of the researcher

• Follow the template
• **Provide full dates that match those in Part A!**
• research career gaps and/or unconventional paths should be clearly explained
• **Can use narrative to help highlight key achievements**
• track record is evaluated against other researchers in your career stage, discipline and sector (academic/non-academic)
• If you are not the first or lead author on publications, briefly explain your contribution
• Include bibliographic information for publications
• Conference/seminar participation
  – were you invited/did you organize the event, were you selected via peer review/talk/poster presentation/panel member...
• include all your areas of experience:
  – teaching, reviewing, consultancy, intersectoral experience, supervision, event organisation, public outreach, committee involvement etc.
• Think about all your activities, including public engagement activities, that can help to demonstrate your:
  – ability to reach and re-enforce a position of professional maturity in research,
  – excellence and expertise
  – ability to benefit from the fellowship
  – to transfer knowledge
Who Submits

MSCA-IF-2020 Call
Who Submits the Application

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.
Letter of Commitment

MSCA-IF-2020 Call
Who needs a letter of commitment?

- **ONLY for Global Fellowships**

- Included in Part B-2 – Section 7
  - Not included as a separate PDF

- GF proposals which fail to include a letter of commitment will be declared inadmissible

- No template but at a minimum the letter must include:
  - heading or stamp from the institution
  - up-to-date (should not be dated prior to the call publication)
  - the text must demonstrate the will to actively participate in the (identified) proposal and the precise role
  - Should only be signed by someone with the legal authority to sign on behalf of the organisation
Session 1
MSCA-IF-2020 Call
Questions

- Can we opt for multicentric studies in different countries? How it will be done?
  - Secondment vs short stay
  - Need to think about what Research needs to be done in each country/centre, which countries being studied and the necessary supervisor arrangements which would best support those activities

- If applicant has continuing contract in UK & leaves for MC Fellowship, how do they handle existing job?
  - Would be discussed and agreed by the employer and hosting/recruiting organization
  - The recruited research would be expected to be employed by the host under an employment contract or equivalent appointing act
  - We see a range of options – generally unpaid leave of absence, but also secondment arrangements
  - Unpaid leave is the easiest
Questions

- Clarify categories of the proposal. E.g., 1.1 'Specific objectives': research or training?
  - the application should very clearly set out what the main overarching research question (goal/aim) is and why (what scientific and wider impact will answering this question have)
  - Outline the key research question(s) being address in this proposal and why these questions are important to addressing the overarching research goal/aim.
  - The individual research question(s) will feed into/be developing in the projects research objectives, which are addressed directly by the research methodology being used.
    - You can use titles such as Research Question/Research Objective 1,2,3 etc. and Research methodology 1,2,3 etc. to help clearly link the two together
  - The same approach can be taken for training.
  - what are the fellows over all career goal, where the fellows would like to be immediately when the project finishes, 2/5 years after. This then can directly relate to the training objectives, and then the individual training activities that would help the fellow meet the training objectives.
  - Training objectives will include research related objectives and complementary training such as transferable skills
    - You can use titles such as Training Objective 1,2,3 etc. and explicitly reference Research Objective x
Questions

- How do you deal the periods of holidays during the project? How does it count?
  - Holidays are not included in the gantt chart

- What is the best way to decide between 2 years and 1 year for the fellowship duration? Can the proposed length be changed?
  - The total number of person months cannot be changed once the project is awarded.
  - The length should reflect the research and training needs of the fellow

- Which is better to apply to CAR or RI? Given that one is eligible for both
  - In 2019 the funding threshold was slightly lower for CAR though the overall success rate was the same
  - Both are multi disciplinary panels and in both cases if the applicant does not meet the eligibility criteria then they will be moved to another Type of Action, providing they comply with the conditions of the other Type of Action. CAR proposal greater than 36 months cannot be moved

- Further clarification and recommendation for the MSCA-IF-2020 Part B1&B2 Forms
  - See previous webinar on Process for Submission and Evaluation
Session 2

MSCA-IF-2020 Call
Questions

- Can I write the work packages, in section 3, in a table to save space?
  - Tables are only for illustrating the core text of the proposal and should not be used to contain the core text itself

- Are 2-y projects more likely to succeed than 3 y ones, when applying for CAR?
  - Solely based on the individual needs of the fellows research and training needs

- For GF proposing USA as Partner Organization, is there a risk considering the Trump' decision to suspend J1 Visa?
  - At the moment suspension is COVID-19 related
  - Depending on when fellowship is proposed to start maybe more or less of a risk

- Is it ok to have numbers in the acronym?
  - No rules on what an acronym should/should not include
  - They do evaluate in alphabetical order
Questions

- **Academic Organization vs Non-Academic Organization?**
  - public or private higher education establishments awarding academic degrees, public or private non-profit research organisations for whom one of the main objectives is to pursue research or technological development, and international European interest organisations
  - Non-educational sector refers to any socio-economic actor not included in the academic sector
    - Eg. from industry to business, government, civil society organisations, etc

- **If project is on gender/sexuality do you need a specific section on gender?**
  - There is a specific evaluation criteria on gender under excellence
  - If the project is explicitly on gender then it may not be necessary for a specific sub-heading as it would be discussed throughout the Proposal
  - Promoting *Gender Equality in Research and Innovation*, incorporating *gender in H2020 proposal*

- **Should future career prospects be aimed at EU?**
  - Though an EU programme that is aims at attracting talent to the EU, it is also about enhancing cooperation/collaboration/networking with EU based researchers
  - If you are not planning on remaining in the EU what plans do you have to maintain the links with your EN host/partner organisations (and for the GF with TC partner organisation)
Session 3

MSCA-IF-2020 Call
Questions

• Ethics
  – Everyone must complete the ethics self assessment
  – ethics self-assessment (done by the applicants, in their proposal)
  – two-stage ethics review, with an ethics screening and, if necessary, an ethics assessment (during the evaluation procedure)
  – if necessary, ethics checks, reviews and audits (during the implementation of the action and up to two years afterwards).

• Any specific guidelines on working with vulnerable people?
  – Will need to complete the ethics section
  – Ethics review process for H2020
  – Most UK universities will have guidance/support for ethical issues
  – ESRC guidance
  – Main ethical principles:
    • Respecting human dignity and integrity, Ensuring honesty and transparency towards research subjects and notably getting free and informed consent, Protecting vulnerable persons, Ensuring privacy and confidentiality, Promoting justice and inclusiveness, Minimising harm and maximising benefit, Maximising animal welfare, and Respecting and protecting the environment and future generations

• I will collect soil and rock samples, do I need to fill out the ethics appendix?
  – The ethic self assessment covers things related to data, research performed in a third country, environmental protection and safety as well as research on humans and human cells.
Questions

• If my proposed date to start is in Sep 21, but then I get a short postdoc from 3/21 to 8/22, can I defer my MSCA to 9/22?
  – Yes. The actual start date will be decided during the grant agreement preparation phase

• I will apply for European IF. If my projects has intersectoral linkage, is it possible to have a partnership other than the host?
  – this could be done through a formal secondment or through short research visits or mentoring arrangements
  – Secondments can ONLY occur at an organization based in a EU member state or associated country

• Reintegration panel or individual fellowship?
  – The reintegration panel has a separate weighting applied which gives it a higher success rate
  – Proposals not complying with the RI eligibility conditions will be automatically transferred to another Type of Action, providing they comply with the conditions of the other Type of Action
Questions

• The research fellow has a strong profile. How would the fellowship contribute to develop his skills/career?
  future plans?
  – Need to think about where to they want to be at the end of the fellowship, in two years, 5 years time
  – What are the skills they will need to get to the next stage of their career – how will the fellowship help them get there?

• Is that proper to prepare a kind of new research field proposal which is more interested and related with the supervisor?
  – It can be easier to justify the host/supervisor, set out the two-way transfer of knowledge, identify skills training etc. if the project is inter/multi disciplinary - But projects don't have to be
  – The fellow and the supervisor should be interested/excited about the research and training project
  – Each activity/decision outlined and discussed in the proposal should be well justified against the research and training needs in line with the evaluation criteria

• The potential partner for the secondment period hesitates, due to the Covid19 situation.
  – the proposal must contain as much information as possible on its overall purpose, sector, place, timing and duration and the partner organization needs to be fully committed
  – if there may be issues as a result of COVID then you could include this in the RISK section
  – Could look at alternative ways to include them that they may be less hesitant about such as mentoring, short visits etc. - will depend on the role of the secondment
Questions

• How much space is it advisable to dedicate to the introduction of the theoretical framework? I would like to know to what extent that would be appreciated by the reviewers.
  – The reviewers will not necessarily be experts in the field; need to ensure that all the necessary information is presented in the proposal to ensure that anyone could fully understand the proposal.
  – The proposal should be written such that it is easy to find the details to address the evaluation criteria.
  – It is important to remember that this is not a academic publication but an application.

• Role between the supervisor/mentor and the fellow. Considering that the fellow intends to learn from the supervisor to expand their understanding what kinds of activities would be useful? What should reinforce the showing that I would learn from them?
  – The two way transfer of knowledge is not just limited to the supervisor, but can also include other team members/colleagues from the department/school/centre etc.
  – Can be through 1:1 meetings, attendance of seminars/lectures/meetings etc.
  – The fellow should not only attend but actively contribute to such activities - they are providing their knowledge/experience to the supervisor/other colleagues etc.
What is the link between innovation and interdisciplinarity?

- **Excellence:** Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects

  - Novelty = what are the innovative aspects of the project? E.g. new idea, new method, the application of an existing method in a new way or to a different research area, new product, application of better solutions that meet new or exiting requirements/needs
    - Use of equipment, technique, method to investigate a piece of research in novel way; 
    Advancement in research being carried out in the host.; New analysis, concept, method that will be implemented; Next stage of development; Working with a mix of disciplines beyond the field; Non-academic & academic collaboration; Communication the research area to a non-scientific audience.; Receiving a mix of specific and transferable skills in a certain research field.

- **Impact:** Quality of the proposed measures to exploit and disseminate the project results
  - how the new knowledge generated by the project will be disseminated and exploited
  - if applicable describe potential commercialization and how intellectual property rights will be dealt with
Questions

• Considering feminism dance research, what kinds of training should be important to do in academic and non-academic institutions?
  – Career Development Plan can be helpful in identifying the skills needed for the fellows career aspirations
  – Many universities have training and development teams that can also advise on this
  – Research skills as well as complementary/transferable skills

• What do you suggest secondment for feminist dance research applied to dance to be hosted by a university?
  – Really depends on the research and training needs of the project
Session 4

MSCA-IF-2020 Call
Questions

• **Tips for addressing gender if it is not an evident issue in project?**
  
  – If the research will at any point in the future be applicable to humans then gender is relevant
  
  – If the project really has no gender component they you can explicitly state that gender is not relevant
  
  – However think about training/management structure/dissemination/exploitation /communication
  
  – Promoting [Gender Equality in Research and Innovation](#), incorporating [gender in H2020 proposal](#)

• **If the main expertise of the host group and the researcher are in the same research area, how to demonstrate two-way transfer of knowledge?**
  
  – The expertise and experience is beyond just the scholarly knowledge
  
  – The fellow and supervisor bring network/collaborators /new ideas
  
  – Think beyond the supervisor/fellow exchange - can also include other team members/colleagues from the department/school/centre etc.
Questions

- Part B-2 Section 5 - Capacity of the Participating Organisations. Should the projects be referred to PI or Department?
  - This section allow experts to assess whether the participating organisations have - or will have by the time of implementation - the operational resources and capacity to implement the action
  - In general depending on the experience of the supervisor, it will be a mix of supervisor, department beneficiary
  - Most UK university EU Research Support teams can help with this section

- How would I include a collaboration in my proposal (for a set of experiments with a different technique)?
  - Depending on what is proposed, the location of the collaborating institutions and necessary supervisor arrangements this could be as formal secondments (keeping in mind the max duration of secondments) or research visits
Questions

• I propose to use mass spec, however I am working as well on a 'contingency plan' in case the data are not very informative. How is this best built in to the proposal?

  – Implementation: Appropriateness of the management structure and procedures, including risk management
    • Discuss the research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur
    • Identify specific risks that could delay the progress of deliverables (delayed start, equipment failure, insignificant results) & contingency plans (back up plan)

  – Excellence: Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects
    • If the prosed methodology/research tasks include additional tasks to confirm/support the findings with mass spec as a normal aspect of your research plan then would be included under Excellence.
Questions

• Which percentage of the Ukrainian scholarly literature is allowed in the proposal and how many scientific references in general should it include? May I include Ukrainian speaking scientific sources? Can I introduce the references from journalists as the expert opinion?

  – The reviewers will not necessarily be experts in the field; need to ensure that all the necessary information is presented in the proposal to ensure that anyone could fully understand the proposal.
  – The proposal should be written such that is easy to find the details to address the evaluation criteria.
  – It is important to remember that this is not a academic publication but an application.
  – References types should in accordance with your research area.
  – In all cases the references are to be included as footnotes.
Some Proposal Development Guidance

MSCA-IF-2020 Call
Proposal Development

**Scientific Element**
- realistic and well-defined research objectives
- novelty, gender, interdisciplinary/intersectoral
- Exploitation and dissemination

**Researcher (Fellow)**
- to reach or re-enforce professional independence
- two way transfer of knowledge
- future career prospects

**Training Element**
- Training-through-research
- Realistic and well-defined training objectives
- Develop and widen the competences
- Transferable skills

**Quality of supervision & integration**
- At all levels (team, unit, department, school, centre, organisations etc.)
- Also at any partner organisation
Beyond Just a Research Project

Knowledge exchange

• Between the fellow and host and any partner organisations

Career development (training)

• **Research Skills**: This are core skills relating to your project. Training Through Research

• **Additional Research Skills**: These are research skills that will advance your competencies in the research areas.

• **Transferable & Complementary Skills**: Transferable skills are the skills you acquire and transfer to future employment settings. Training Through Research or additional courses.

• **Training Through Research**: detail the core & advanced research skills you will develop and how your supervisor/host environment/partner organisations/short visits will enable you to develop them
### Typical Training Examples

**Examples of transferable skills**

- Entrepreneurship & innovation; Grant writing, Patent applications; IPR Management and Patenting, Leadership/Influencing courses, Project management, People management, Gender training; Presentation skills; Public engagement, Ethics in Research (RRI), policy; CV preparation, interview skills etc.

**Examples of advanced research skills**

- Training in new techniques, Open science, Big data, Scientific writing, Experimental design, Qualitative & quantitative methods, User design, gender
Public engagement, Dissemination and Exploitation

**Public engagement**

- Describe the target audiences for communication of project activities:
  - such as university students, schools, end users, media, community groups, charities, general public, etc.
- Why does the target audience need to know about the action
- Think about the key messages you wish to communicate
- Detail the activities you will use
- One way vs. two-way communication

**D&E**

- who you will seek advice from in your institution on these matters
- What are the key project results
- Who are the target audiences and key stakeholders:
  - such as the scientific community, industry, professional organisations, policy makers, etc.
- Describe potential commercialisation, if applicable
- Detail the dissemination activities you will use:
  - such as conferences, industry events, journal publications, workshops, social media, tradeshows, book chapter etc.
- Describe the potential exploitation methods
- e.g. collaborative research, product development, spinoff etc.
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
Evaluator Comments

Key points

- Evaluators are expertise - but a larger audience than in a typical scientific seminar you would present at
- Expect proposals on a whole to address all the criteria
- Think beyond the science – identify the Fellows training needs
- Get the science AND the training right
- Two-way transfer of knowledge
- The supervisor and the fellow need to comment time and energy to the project and proposal development
- Important that the application is a co-production between the supervisor, the Fellow and the research institution
- Tables and diagrams can be helpful in the implementation section – but they need to be clear
- Get someone unrelated to the project to read it through
Cross Cutting Issues & Resources
MSCA-IF-2020 Call
Cross Cutting Issues

Open Access

- Obligation to provide open access when publishing and to research data (pilot and opt-out available) – Article 29 of Model Grant Agreement
- “As Open as Possible, as Closed as Necessary”
- Data Management Plan (DMP) is a deliverable in the first 6 months

Gender and Intersectionality

- Is an explicit evaluation criteria under Excellence
- Equal Opportunities among seconded staff and decision-makers/supervisors
- Consider whether and how the gender dimension is relevant to your research (Gender Dimension of Research)
- Consider gender dimension in project management and networking activities
- Resources: Promoting Gender Equality in Research and Innovation, incorporating gender in H2020 proposal
Resources

- **MSCA 2018-2020 Work Programme**
- **2020 Guide for Applicants**
- **MSCA 2020 Call** – Funding & Tender Opportunities Portal
- **UKRO Webinars**
  - Session 1: Overview and Eligibility
  - Session 2: Practical Matters
  - Session 3: Process for Submission and Evaluation
- **NET4Mobility+** Network of MSCA NCPs
  - Handbook for 2020 Individual Fellowship 2020
  - Individual Fellowship Webinar
- **Marie Curie Alumni Association**
- **EURAXESS**
- **EURAXESS REFEX (Career Development App)**
Thank you. Questions?

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