# Where to Start?
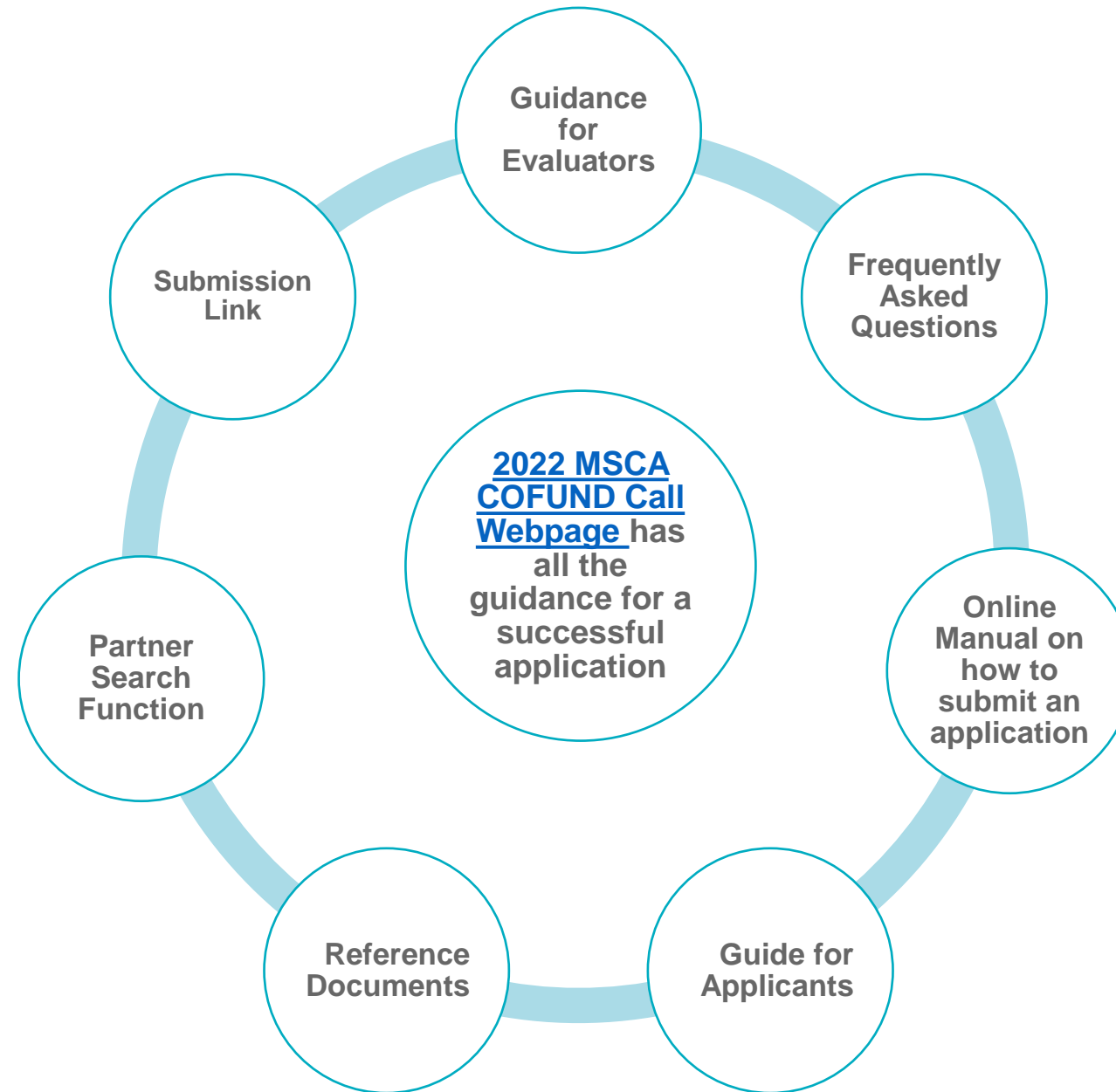
HORIZON-MSCA-2022-COFUND-01-01

# Where to Start

- **You can find all guidance documents (and the submission link) on the 2022 MSCA COFUND Call page:**

  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-msca-2022-cofund-01-01

# The 2022 MSCA COFUND Call Website



Guidance for Evaluators

Frequently Asked Questions

Submission Link

**2022 MSCA COFUND Call Webpage** has all the guidance for a successful application

Online Manual on how to submit an application

Partner Search Function

Guide for Applicants

Reference Documents

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# Finding partners

- Use the [MSCA matchmaking platform](#)

- Use the Partner Search function on the [2022 COFUND Call Webpage](#): find partners or publish your own advertisement.

- Use your existing networks

- Contact potential partners - ask yourself:
  - Is my internet presence up-to-date?
  - Am I clear on what I'm contributing to the project?

- Check [Previous Projects on Cordis](#) for potential collaborators

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# The consortium

- As early as possible, discuss and agree with your partners on:
  - Research project
  - Research/Training needs, opportunities and infrastructure?
  - How does each partner fit into the overall project?
  - Research resources, supervision, training provision(s)?
  - Financial allocation (budget)
  - Structure of COFUND

- Simple tables and Gantt charts can help to gain clarity:

| Consortium Members (CM) | Particular skills and knowledge (RI) | | | |
|---|---|---|---|---|
| | RI1 | RI2 | RI3 | … |
| COFUND Monobeneficiary | | X | | |
| Implementing Partner | X | X | | |
| Associated Partner | | | X | |
| …. | | | | |

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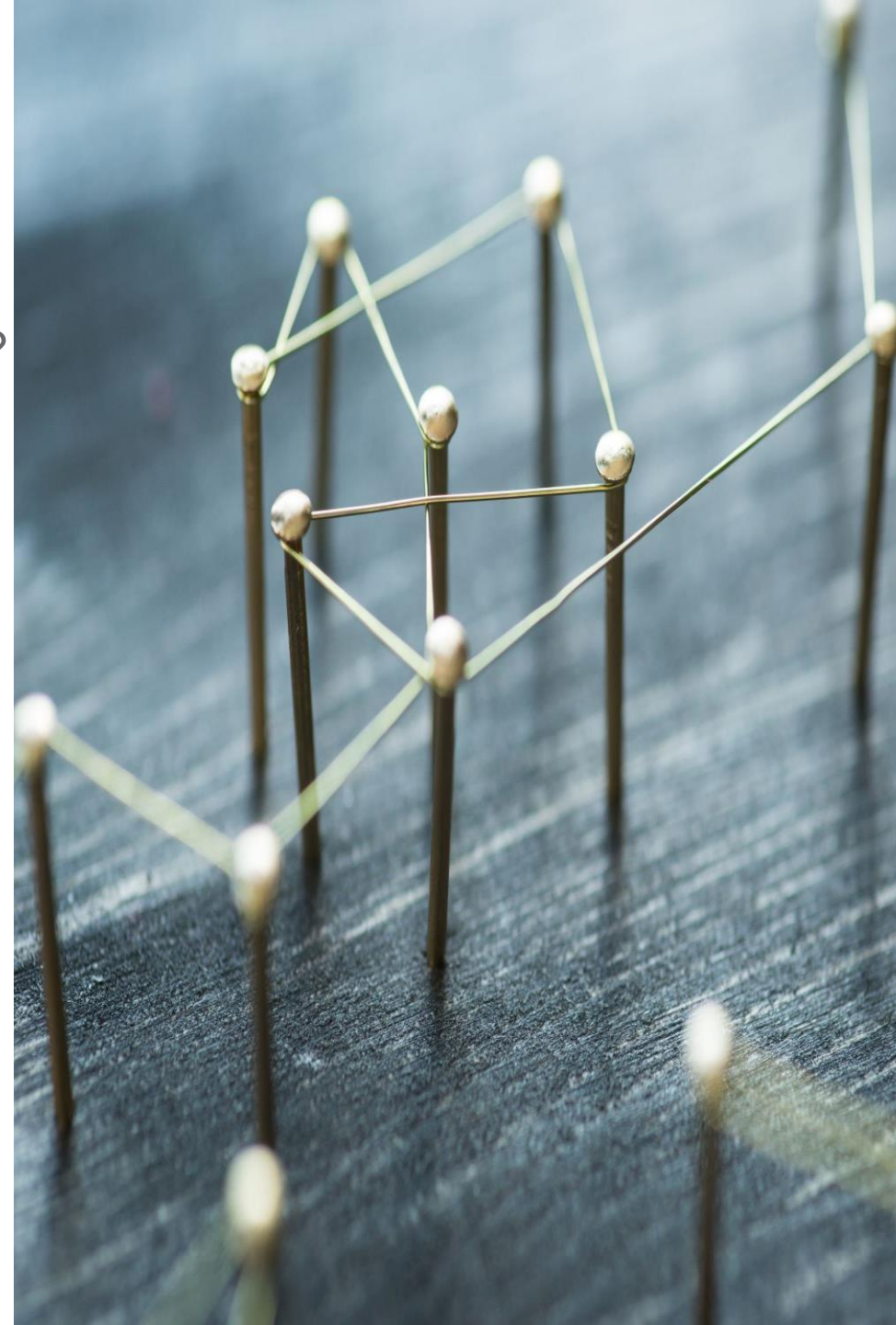
# Proposal Advice

- Read all call documentation and the evaluation criteria on the 2022 MSCA COFUND Call Webpage.

- Closely follow the call requirements and the proposal template

- Be in line with the action's objectives and expected outcomes

- Describe the benefits of cooperation and how they can go beyond this project

- Make it easy for the evaluators to find the information

- Use clear and concise language

- Include diagrams, images, tables if appropriate

- Research previous and current projects

- Find colleagues to proof read drafts with the evaluation criteria in mind

- Consider any relevant EU policy documents and highlight that your proposal addresses EU policy priorities and/or societal challenges

**MSCA COFUND Submission**

HORIZON-MSCA-2022-COFUND-01-01

# 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

Refer to the Guidance Documents &
Follow the Formatting Rules in the Template Guidance

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# Start Submission

- **Submission link on Call Webpage:**

  https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-msca-2022-cofund-01-01

## Start submission

To access the Electronic Submission Service, please click on the submission-button next to the **type of action** and the **type of model grant agreement** that corresponds to your proposal. You will then be asked to confirm your choice, as it cannot be changed in the submission system. Upon confirmation, you will be linked to the correct entry point.

To access existing draft proposals for this topic, please login to the Funding & Tenders Portal and select the My Proposals page of the My Area section.

**Please select the type of your submission:**

◯  HORIZON TMA MSCA Cofund Doctoral programme [HORIZON-TMA-MSCA-Cofund-D], HORIZON Unit Grant [HORIZON-AG-UN]

◯  HORIZON TMA MSCA Cofund Postdoctoral programme [HORIZON-TMA-MSCA-Cofund-P], HORIZON Unit Grant [HORIZON-AG-UN]

[Start submission]

[🛟 Need help?]

Single step submission of Part A and Part B together at deadline

**Part A**
- Administrative forms and abstract
- Filled out online

**Part B**
- Proposal overview
- Submitted as .pdf

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# Add Participants



- *Associated Partners are added in Part A and in Part B, Section 5*
- *Implementing Partners are added in Part B, Section 5*

*2022 MSCA COFUND Guidance, p.8-9*

# Where to find and fill out Part A and Part B



**Funding: Submission Service**

Welcome **Anne Nierobisch**

Login — Topic selection — Create proposal — Participants — Proposal forms — Submit

## Proposal forms

**Deadline**
09 February 2023 17:00:00 Brussels Local Time

**106** days left until closure

### Call data

Call: HORIZON-MSCA-2022-COFUND-01
Topic: HORIZON-MSCA-2022-COFUND-01-01
Type of action: HORIZON-TMA-MSCA-Cofund-D
Type of MGA: HORIZON-AG-UN

⚠ Topic and type of action can only be changed by creating a new proposal.

### Proposal data

Acronym: cofund-test
Draft ID: SEP-210906171

### Download Part B templates

⬇ Download part B templates

### Support & Helpdesk

🖥 Online Manual       ℹ IT How To

✉ IT Helpdesk       ❓ FAQ

In this step you can edit the Administrative Forms and upload the proposal and its annexes. You may return to this step from the 'My Proposals' section of the Funding & Tenders Portal.

Submit your proposal as early in the process as possible - you can update and resubmit an improved version many times before the call closure.

Submitting a proposal will overwrite any previous versions of this same proposal - this process is irreversible.

Any changes made to the proposal will not be available to the European Commission service unless resubmitted before the call closure.

⊗ Your proposal contains changes that have not yet been submitted.

#### Administrative forms (Part A)

Edit forms ✎       View history       Print preview   ℹ

**Part A: Administrative Forms**
*Complete online*

#### 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. ℹ

Part B1 *   [ ] ℹ   Upload ☁
Part B2 *   [ ] ℹ   Upload ☁

**RTF version of template for Part B**

*Upload as PDF*

◄ BACK TO PARTICIPANTS LIST     VALIDATE     SUBMIT

# Part A: Budget Table

Application forms

Proposal ID **SEP-210906171**

Acronym **cofund-test**

## 3 - Budget

| Participant number | Organisation short name | Role | Country | Academic sector | IO | No of recruited researchers | Number of person months(Employment) | Number of person months(Fellowship) | Contributions for recruited researchers | | | Total EU Contributions | Own resources | Financial contributions | Total estimated project income |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | Employment Contract | Fixed amount fellowship | | | | | |
| 1 | UKRI | Coordinator | UK | Yes | No | 3 | 1080 | 0 | 3024000 | | 0 | 3024000.00 | 100000.00 | 0.00 | 3124000.00 |
| 2 | University Cranfield | Associated | UK | No | No | 0 | | 0 | | | 0 | 0.00 | | | 0.00 |
| Total | | | | | | 3 | 1080 | 0 | 3024000 | | 0 | 3024000.00 | 100000.00 | 0.00 | 3124000.00 |

- Enter the number of researchers to be recruited by the mono-beneficiary and implementing partner(s)

- Enter the number of requested person-months and contract type for recruited researchers

- **EU contributions are automatically calculated from unit costs.**

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# Part A: Ethics & Security questions

**UK applicants should answer 'yes' on questions about non-European activity**

Follow Horizon Europe guidance document:
'How to complete your ethics self-assessment'

This will not affect eligibility.

Answering 'yes' on certain questions may require a brief text response from the applicant.

Applicants may be requested to upload documents related to particular questions.

Page references to relevant sections of proposal for each issue if you answer 'Yes' (part B1 and B2)



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# Part A: Responses on non-EU activity

- "Will some of the activities be carried out in non-EU countries?"

  - Answer **yes for UK activity** and cite relevant points in the proposal.

  - Similarly if there are any other activities outside EU member states.

- *"Is it planned to export personal data from the EU to non-EU countries?"*

  - Explain how these exports are **in accordance with GDPR** (Chapter V of the General Data Protection Regulation 2016/679).

  - Mention the **EU Adequacy Decisions for the UK** on the protection of individuals regarding the processing of personal data and free movement of such data from the EU to the UK.

- *"Does this activity involve non-EU countries?"*

  - You need to answer **yes for UK activity if the project involves EU classified information** (EUCI; see Article 3 definition)

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# Part B: Adding the information on Partners

**5. Partner Organisations**

Please list and detail the role of the partner organisations (implementing/associated - if known), including their financial contribution to the programme (when applicable):

Table 5.1

| Partner organisation name | Partner organisation short name | Country | Implementing Partner (tick) | Associated Partner (tick) | Academic (Y/N) | Role | | | |
|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Hosting researchers WITH recruiting (Y/N) | Hosting researchers WITHOUT recruiting (Y/N) | Providing other training or career development opportunities (Y/N) | Financial contribution in EUR (if applicable) |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |

*Note that:*
– *Any relationship between different participating organisations or individuals (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff, etc.) **must** be declared and justified;*
– *The data provided relating to the financial capacity of the beneficiary will be subject to verification during the grant preparation phase.*

## Implementing partners
- Can directly recruit researchers
- Receiving financial support from the beneficiary
- Involved in implementation of the project

## Associated Partner
- Providing training or secondments
- Do not directly recruit researchers

*Don't forget to include the letters of commitment from your implementing and associated Partners in your application!*

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**2022 MSCA COFUND: Evaluation**

HORIZON-MSCA-2022-COFUND-01-01

# Evaluation Process



| Receipt of proposals | Individual evaluation | Consensus group | Panel review | Finalisation |
|---|---|---|---|---|
| Admissibility/eligibility check<br><br>Allocation of proposals to evaluators | Experts assess proposals **individually**.<br><br>Minimum of three experts per proposal (but often more than three). | All individual experts discuss together to agree on a **common position**, including comments and scores for each proposal. | The panel of experts reach an **agreement** on the scores and comments for all proposals within a call, checking **consistency across the evaluations**.<br><br>if necessary, resolve cases where evaluators were unable to agree.<br><br>Rank the proposals with the same score | The Commission/Agency reviews the results of the experts' evaluation and puts together the **final ranking list**. |

European Commission

- Max 5 months from submission for evaluation outcomes, and 3 months to sign the grant agreement

- Evaluated in two different panels (Doctoral Programmes, Postdoctoral Programmes)

- A single ranking list will be produced.

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- Expert Briefing MSCA H2020

- MSCA COFUND Standard evaluation form (HE MSCA)

# Independent Experts

## Independent Experts

- Perform evaluations on a personal basis, not on behalf of their organisation or country
- Are independent, impartial and objective
- Evaluate on their own and in strict confidence
- Must declare conflicts of interest

## Independent Observer

- Oversees the process
- Provide feedback to the REA
- Comment on the conduct and fairness of the evaluations
- Recommend improvements to the process (not involved to comment on evaluators or proposals)

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# Evaluation Criteria

| Excellence | Impact | Quality and efficiency of the implementation |
|---|---|---|
| Quality and novelty of the selection / recruitment process for the researchers (transparency, composition and organisation of selection committees, evaluation criteria, equal opportunities, **the gender dimension and other diversity aspects)** and quality and attractiveness of the appointment conditions, including competitiveness of the salary for the standards of the hosting countries | Strengthening human resources good practices at institutional, regional, national or international level, in particular through aligning the practices of participating organisations with the principles set out by the EU for human resources development in research and innovation | Quality and effectiveness of the work plan, management structures, assessment of risks and appropriateness of the effort assigned to work packages |
| Quality and novelty of the research options offered by the programme in terms of science, interdisciplinarity, inter-sectorality and level of international mobility. Quality of **open science practices** | Credibility of the proposed measures to enhance the career perspectives and employability of researchers and contribution to their skills development | Quality and capacity of the host institution(s) and participating organisations (where appropriate), including hosting arrangements and extent to which they bring together the necessary expertise to successfully implement the research training programme |
| Quality, novelty and pertinence of the **supervision, career guidance and career development arrangements** | | |
| **50%** | **30%** | **20%** |

Proposals scoring equal to or above 70% will be considered for funding  within the limits of the available call budget.

# Score Descriptors – Consensus Discussions

| Descriptor | Score | Range | Category |
|---|---|---|---|
| **Excellent.** The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor. | 5 | | Excellent |
| **Very Good.** The proposal addresses the criterion very well, but a small number of shortcomings are present. | 4 | 4.9 ↕ 4.0 | Very Good |
| **Good.** The proposal addresses the criterion well, but a number of shortcomings are present. | 3 | 3.9 ↕ 3.0 | Good |
| **Fair.** The proposal broadly addresses the criterion, but there are significant weaknesses. | 2 | 2.9 ↕ 2.0 | Fair |
| **Poor.** The criterion is inadequately addressed, or there are serious inherent weaknesses. | 1 | 1.9 ↕ 1.0 | Poor |
| The proposal **fails** to address the criterion or cannot be assessed due to missing or incomplete information. | 0 | | |

- ❑ Involves an exchange on the basis of the 3 individual evaluations – Not just a simple averaging exercise
- ❑ The aim is to find agreement on comments and then the scores
- ❑ "Outlying" opinions are explored
- ❑ Additional evaluators can be used if necessary

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# Addressing the Evaluation Criteria: Tips and Tricks

# Section 1 Excellence – Some Tips

Be clear on the number of researchers to be recruited, how long the programme will run for, how many calls, the duration etc.

Describe the beneficiary and the partner organisations (brief as the full details are in section 3)

Demonstrate the transparency of the selection process of the researchers

Describe how the programme will support the practice of Open Science

List the Evaluation Criteria to be used for selection and scoring system

Demonstrate how equality and diversity will be championed during recruitment

Describe the Excellence of the research programme

Clearly detail the appointment conditions

Demonstrate the range and quality of the research options (in terms of interdisciplinary research options, intersectorality and international networking)

Describe the supervision arrangements – MSCA Guidelines on Supervision

Describe the training opportunities

Describe the dissemination Strategy, activities and target audience for the open calls

# Section 1 Impact – Some Tips

Link to the expected outcomes for the COFUND call set out in the [MSCA Work Programme](MSCA Work Programme)

Think about research, organisational and systems level

Describe how the potential and future career perspectives of selected researchers will be enhanced – what are the skills they will get and how does this relate to career prospects

Describe how the programme will be increasing the attractiveness of the participating organisations towards talented researcher

How the programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I at the participating organisations – HR in excellence awards etc.

Describe how the programme will impact on better quality research and innovation contributing to Europe's competitiveness and growth

Describe plans and procedures for exploitation and dissemination of results towards the research and innovation community and other relevant stakeholders

# Section 3 Implementation – Some Tips

Describe the central services / offices / expertise of the beneficiary and partner organisations will be made available to the programme e.g. Research office, Graduate Studies office, communication office, marketing, international affairs and what experience do they already have in H2020 or MSCA?

Describe the management plan of the programme and the resources; define the work packages and deliverables

Describe the financial management and risk management/contingency plans of the programme

Description of how the administrative, technical and human resources will be used to implement the programme

Description of partner organisations hosting and training the researchers if known

Describe how the funding will be distributed to the fellows (i.e: monthly, etc), and to all the partner organisations

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# Feedback - Doctoral Programme

## Strengths

- The quality of the research options offered by the programme is well described.
- The program reveals good level of intersectorality, internationality and transnational mobility
- The impact of the research and training programme on enhancing the ESRs careers is high.
- The appointment conditions of ESRs are adequately described
- The information provided to the applicants is thoughtfully formulated.
- The financial management is transparent and appropriately planned.
- The planned budget is sufficient and considers the major expenses
- The information provided to the ESR candidates is well described and supports the transparency of the recruitment procedure.
- The eligibility criteria and the application requirements are clearly formulated.
- The appeal and redress procedures are considered at sufficient depth

## Weakness

- The list of transferable skills courses provided in the proposal is very limited
- There is little information about the selection procedures
- Employment conditions for support of ESRs with special needs are insufficiently addressed
- The intersectoral dimension of the project is in practice limited
- The dissemination and communication strategies are described only in general term
- The administrative capacity and support for the implementation of the project is not sufficiently argued by the proposal
- The composition of the selection committee is generically described
- Involvement of the academic partners for implementation of the project are missing
- There is no actual plan by which to encourage female applicants

# Feedback – Postdoctoral Programme

## Strengths

- Application requirements are clear overall
- A clearly international peer review is foreseen with experts to be selected using a rich database.
- The host provides a comprehensive catalogue of soft skills training courses, available to fellows
- Equal opportunities are well considered
- Special attention is paid to gender balance.
- A detailed and coherent work plan with outlined work packages
- The beneficiary and the partner organisations are competent to run the programme
- The capacity of the Fellowship Programme to enhance researchers' potential and their future career prospects is convincing
- The management structure and procedures for the Fellowship Programme are addressed appropriately
- The dissemination of the calls for the fellowship programme is very efficient and wide-reaching

## Weakness

- The evaluation criteria lack clarity without justification given for the widely differing weights
- Both the type and content of the information to be provided to the candidates are addressed insufficiently.
- A redress procedure is not addressed in sufficient detail.
- The supervision arrangements presented in a too generic manner, - lack of clarity regarding the responsibilities of supervisors and fellows.
- The monitoring of fellows' progress, their career development promotion and guidance are addressed insufficiently.
- IPR procedures and management are addressed insufficiently
- Support services/facilities offered to the fellows not addressed in the proposal
- The selection process for identifying international experts is not convincing
- The proposal does not present the specific sub criteria for each award criterion
- The programme's impact on regional, national or international level beyond the impact on the host institution is not convincingly addressed

# Addressing the Evaluation Criteria: Further Considerations

# Gender and Intersectionality

**Renewed emphasis on Equality, Diversity and Inclusion**

Publicly funded R&I should benefit all of society

Every cell is sexed, everyone has a gender

Adds a valuable dimension to research and can take it in a new direction

Aims to eliminate gender inequalities and intersecting socio-economic inequalities

Makes research more responsive to social needs

Enhances societal relevance research and outputs

Ensures excellence and quality in outcomes and enhancing sustainability

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# Inclusion of Gender Dimension in MSCA Proposals
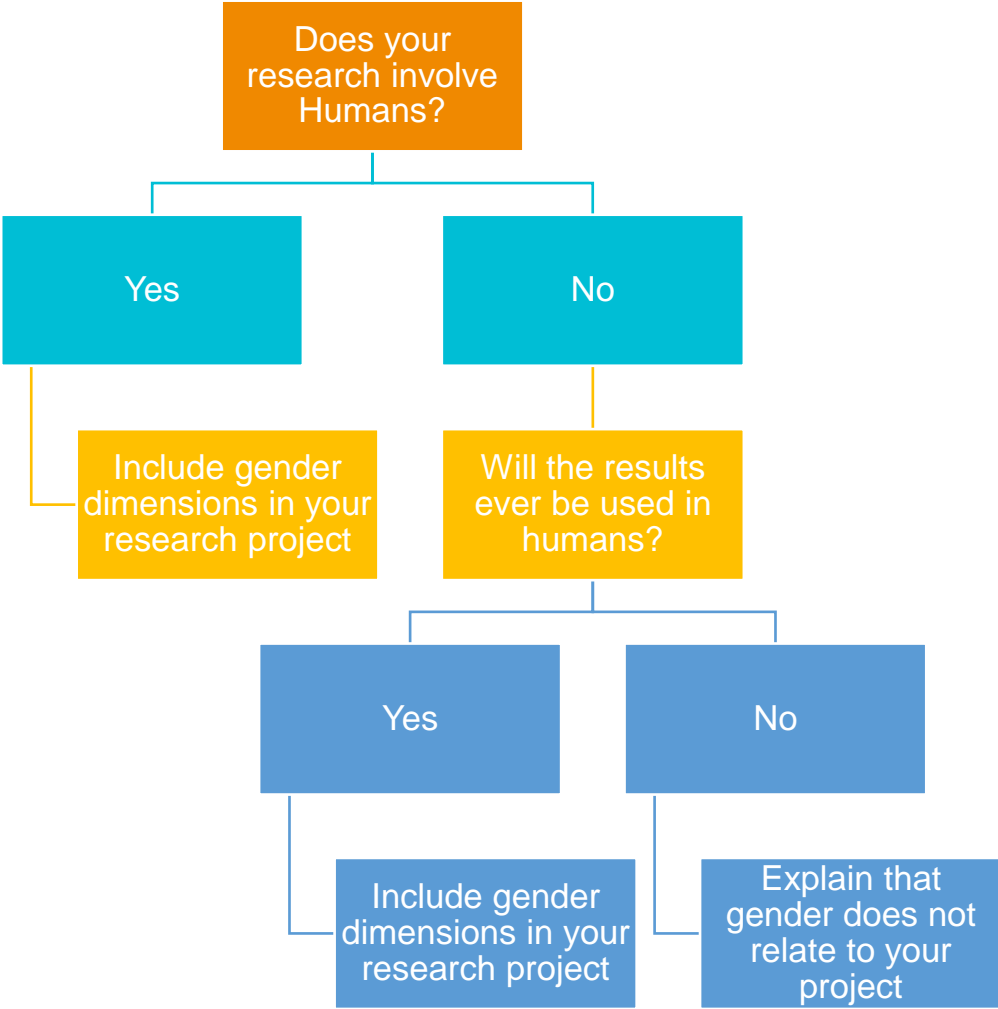


**The gender dimension of the research project will be evaluated under the criterion "Excellence"**

# Gender Dimension in the proposal

**It could be considered that some research topics/projects have no or limited gender dimension**

- **If so, that needs to be explicated in the proposal and not left out**
- Think about the other elements, such as :
    - communication, dissemination and exploitation?
    - research environment and consortium composition?
    - training?

## Resources

- Genderaction.eu
- Gendered Innovations
- Gender in Research

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# Open Access

## Encouraging uptake of Open Science Practices

Enhance researcher skills in Open Science and support reward systems

Open access to scientific publications as well as to data

Immediate open access via repository at the latest upon publication under open licence

All research data must be managed in line with FAIR principles, with data management plan as a standard deliverable

Open access to research data via repository under principle 'as open as possible, as closed as necessary'

**The use of and quality of open science practises is evaluated as part of the 'Excellence' Criterion**

# Dissemination, Exploitation and Communication

**What do you do with your results…**

## Dissemination

Promotion and raising awareness of project results

## Exploitation

Using the results, such as for commercial purposes or in public policymaking

## Communication

Making your research activities known to society throughout project life span – Public Engagement

**Evaluated under the Impact criterion**
Institutions often have teams that can help/support these activities

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# Addressing D,E & C

| | Objective | Focus | Target Audience |
|---|---|---|---|
| **Communication** | Researching out to society<br>Demonstrating impact and benefits | Informing about and promoting the project and the results/successes | Multiple audiences |
| **Dissemination** | Transfer of knowledge and results<br>Aim to enable others to use and take up results | Ensure results are available and able to be used by others | Those that are interested in the potential use of the results |
| **Exploitation** | Use of project results through scientific, economical, political or societal exploitations<br>Turn R&I actions into concrete value and impact for society | Make concrete use of results | People/organisations, including project partners that can make concrete use of the results<br>User groups |

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# Expected Impact

**Steps towards the achievement of the expected impacts of the project over time**

**Scientific impact**
- Creating high-quality new knowledge
- Strengthen human capital in R&I
- Fostering diffusion of knowledge and Open Science

**Societal impact**
- Addressing EU policy priorities and global challenges
- Delivering benefits and impacts via R&I missions
- Strengthening the uptake of R&I in society

**Economic impact**
- Generating innovation-based growth
- Creating more and better jobs
- Leveraging investments in R&I

- Begins with the results, through to dissemination, exploitation and communication

- Maps the contribution to the expected outcomes in the destination and wider work programme

- Depending on the project may address only 1 or more of the three expected impacts

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# Thank you

## Questions?

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