

UKRO Annual Visit University of Exeter

26 May 2016

UKRO European Advisor

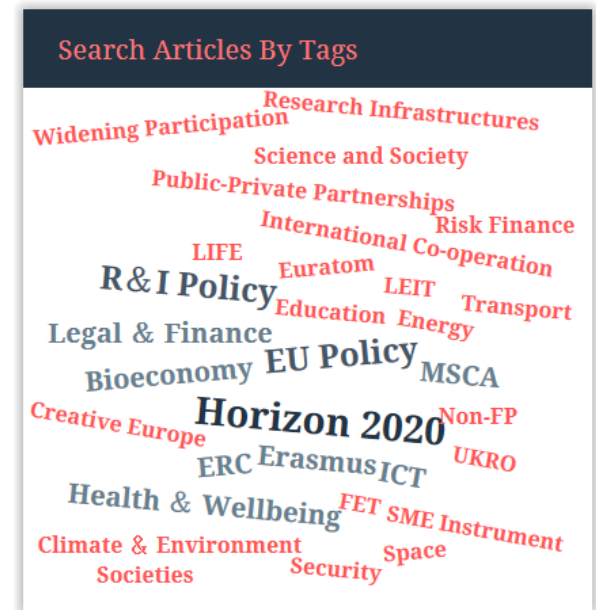
malgorzata.czerwiec@bbsrc.ac.uk

Marie Skłodowska-Curie Actions (MSCA)

Individual Fellowships

- Tailored news articles on EU funding and policy
- UKRO Factsheets on Horizon 2020 and other funding streams
- Email alert function and search engine with refiners and tags
- Daily or weekly alerts - personalise your account to best meet your needs!

HAVE YOU SIGNED-UP?



Marie Skłodowska-Curie Actions (MSCA)

Policy background, schemes overview and basic
participation rules

Horizon 2020 structure



Who is eligible?

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

Who is eligible?

- Overseas Countries and Territories (OCT) linked to the Member States
 - *Just naming a few:* Anguilla, Aruba, Bermuda, Bonaire, British Virgin Islands, Cayman Islands, Curaçao, Falkland Islands, French Polynesia, Greenland, Montserrat, New Caledonia, Pitcairn Islands, Saba, Saint Barthélemy, Saint Helena, Saint Pierre and Miquelon, Sint Eustatius, Sint Maarten, Turks and Caicos Islands, Wallis and Futuna
- Associated Countries:
 - Norway, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland (*partial association Pillar 1, including MSCA*), Faroe Islands, as well as Tunisia, Ukraine and Georgia
- Third countries (*whether they can receive funding depends on GDP/list in Work Programme*)
- BRIC no longer eligible for funding (Brazil, Russia, India, China)

Work Programme



“.. Ensure excellent and innovative research training as well as attractive career and knowledge-exchange opportunities through cross-border and cross-sector mobility of researchers to best prepare them to face current and future societal challenges.”

- 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



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

MSCA calls – 2016 timetable (preliminary)

Call identifier	Publication date	Deadline	Call budget, €M
MSCA-ITN-2016	15 October 2015	12 January 2016	370
MSCA-ITN-2017	15 September 2016	10 January 2017	430
MSCA-RISE-2016	8 December 2015	28 April 2016	80
MSCA-RISE-2017	1 December 2016	5 April 2017	80
MSCA-IF-2016	12 April 2016	14 September 2016	218.50
MSCA-IF-2017	11 April 2017	14 September 2017	248
MSCA-COFUND-2016	14 April 2016	29 September 2016	80
MSCA-COFUND-2017	5 April 2016	28 September 2017	80
MSCA Researchers' Night	15 October 2015	13 January 2016	8

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)

Key MSCA Definitions

ITN

COFUND

RISE

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

Individual Fellowship

RISE

COFUND

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

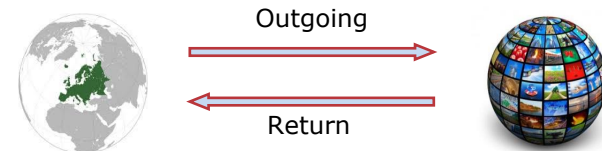
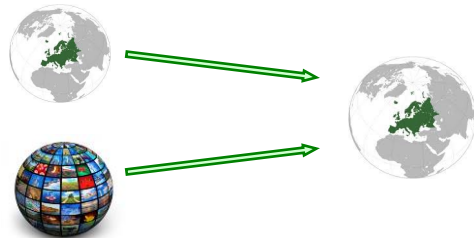
Academic sector

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

Individual Fellowships (IF)



European Fellowships (12-24 months)

Standard Panel

Enterprise and
Society Panel

New

Career Restart
Panel (CAR)

Reintegration Panel
(RI)

From any country to MS/AC

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)**

Society and Enterprise Panel

New for 2016-2017!

Main Features

- **Multidisciplinary panel** under European Fellowships
- Dedicated budget of **EUR 10 million**
- Open to organisations from the **non-academic sector**
- Research and innovation-related projects can be funded
- Relaxed mobility rule to apply (as with AR 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

- **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**

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 previous long-term residents (>5 years in research role) 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 prior to deadline (CAR)
- Must be hosted and supervised at non-academic sector institution (Society and Enterprise)

Mobility and eligibility rule

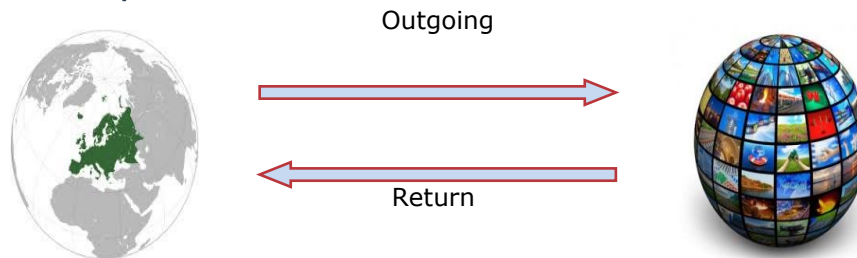
- **Global Fellowship**

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

- Must be nationals or previous long-term residents (research active for >5 years in EU/AC) of a MS/AC



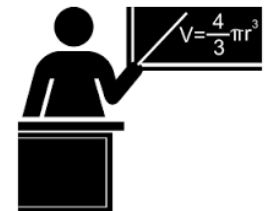
Individual Fellowship activities

- ‘**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

Duration of IF project	Max. secondment duration
≤18 months	3 months
>18 months	6 months

- 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)



Secondment
≠
short visit or field work

2014 Secondment & PhD Statistics

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

	Researcher unit cost [person/month] EUROS			Institutional unit cost [person/month] EUROS	
Scheme	Living allowance*	Mobility allowance	Family allowance	Research, training and networking costs	Management and overheads
IF	4650	600	500	800	650

- Funding based fully on unit costs, multiplied by requested person months
- Automated calculation of budget when person months entered into application
- No detailed financial reporting
- Expectation of full-time research fellowship, but can incl. some supervision, teaching, etc.
- Requests for part-time working may be possible during grant negotiation / life-time of grant if for personal or family reasons. Professional reasons require suspension of award.

** A correction co-efficient applies to living allowance (e.g. 120.3% for the UK), see MSCA Work Programme!*

MSCA projects



European Commission
European commission > Euraxess

EURAXESS
RESEARCHERS IN MOTION

EURAXESS - Researchers in Motion is a unique pan-European initiative providing access to a complete range of information and support services to researchers wishing to pursue their research careers in Europe or stay connected to it.

JOBS
Employers and funders have jobs and fellowships up for grabs.
[See who's offering what](#)

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Seeking personalised assistance or advice when relocating?
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Did you know that hundreds of institutions are doing their best to improve your working environment?
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LINKS
Are you a European researcher working outside Europe? Or are you a non-European researcher wishing to come to Europe?
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► <http://ec.europa.eu/euraxess>



European Commission
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Community Research and Development Information Service

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Search term: itn
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Free text [v] itn [Q]

Results 1 - 10 of 709
Order by: Relevance [v] Results/page: 10 [v]

1 2 3 4 5 6 7 8 9 10 > >|

- ☐ [PROJECT] [ADAPT-R - Architecture, Design and Art Practice Training - research](#)
Ref.: 317325
Start date: 2013-01-01, **End date:** 2016-12-31
The ADAPT-r ITN aims to significantly increase European research capacity through a unique and ground-breaking research model: at its core is the development of a robust and sustainable ITN in an emergent Supra-Disciplinary field of research across a range of design and arts ...
Programme: FP7-PEOPLE
Record Number: 106609
Last updated on: 2014-07-18
- ☐ [PROJECT] [GREAT - Gaia Research for European Astronomy Training - ITN](#)
Ref.: 264895
Start date: 2011-03-01, **End date:** 2015-02-28
Gaia is the ESA cornerstone mission set to revolutionise our understanding of the Milky Way. This proposal will shape a critical mass of new expertise with the fundamental skills required to power the scientific exploitation of Gaia over the coming decade and beyond. The GREAT...
Programme: FP7-PEOPLE
Record Number: 96887
Last updated on: 2013-02-12
- ☐ [PROJECT] [TECAS - Towards Tissue Engineering Solutions for Cardiovascular Surgery](#)
Ref.: 317512
Start date: 2013-01-01, **End date:** 2016-12-31
The aim of the TECAS ITN is to integrate the major European contributors in the field of cardiovascular tissue engineering (TE) and regenerative medicine (RM), to generate a coherent framework of expertise which will facilitate the training and career development of early staq...

European Fellowships – 2014 Call

Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
CHE	89.6	88	18.40
ECO	86.6	85.4	19.10
ENG	88.6	87	18.80
ENV	90.4	89.4	18.60
LIF	90.6	89.2	18.50
MAT	90.2	88.4	18.80
PHY	90.4	89.4	18.80
SOC	92.8	90.8	18.60
CAR	87.2	85	18.20
RI	90.8	89.4	19.00

Global Fellowships – 2014 Call

Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
CHE	93.6	93.4	10
ECO	93.2	92	10.30
ENG	93.8	91.2	11.60
ENV	93.4	92.2	10.90
LIF	92	91	11.60
MAT	92.2	86.6	5.90
PHY	93	92.6	11.20
SOC	92.8	92.4	11.90

European Fellowships – 2015 Call

Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
CHE	90.8	89.4	14
ECO	89.8	87	14.1
ENG	90.6	89.4	14.1
ENV	91.2	90.4	14.1
LIF	92.4	91.4	14.1
MAT	91	90	13.8
PHY	91.2	90.4	14.2
SOC	92.2	90.8	14.3
CAR	91.2	90	13.8
RI	92.2	91	14.6

Global Fellowships – 2015 Call

Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
CHE	94	92.6	10.3
ECO	94	89.4	13.6
ENG	93.8	92.8	10.8
ENV	93.6	92.6	10.8
LIF	93.8	92.6	11.1
MAT	91.6	90.8	10
PHY	93.4	92.4	10.6
SOC	93.6	93	11.2

Individual Fellowships (IF)

Proposal submission



RESEARCH & INNOVATION

Participant Portal

European Commission > Research & Innovation > Participant Portal > Opportunities

HOME

FUNDING OPPORTUNITIES

HOW TO PARTICIPATE

EXPERTS

SUPPORT

Search PP

LOGIN

REGISTER

EU Programmes 2014-2020

Search Topics

Updates

Cells

H2020

Research Fund for Coal & Steel

3rd Health Programme

Promotion of Agricultural Products

Consumer Programme

COSME

Justice Programme

FP7 & CIP Programmes 2007-2013

Calls

Other Funding Opportunities

TOPIC : Individual Fellowships

Topic identifier: MSCA-IF-2016

Publication date: 14 October 2015

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

DeadlineModel: single-stage

Opening date: 12 April 2016

Deadline: 14 September 2016 17:00:00

Time Zone : (Brussels time)



Horizon 2020

Pillar: Excellent Science

Work Programme Year: H2020-2016-2017

Work Programme Part: Marie Skłodowska-Curie Actions

Call : H2020-MSCA-IF-2016

[H2020 website](#)

[Call budget overview](#)

Topic Updates

+ More

• 15 April 2016 20:04

The submission session is now available for: MSCA-IF-EF-ST-Standard EF, MSCA-IF-EF-

Topic Description

+ More

Objective:

The goal of Individual Fellowships is to enhance the creative and innovative potential of experienced researchers, wishing to diversify their individual competence in terms of skill acquisition through

Topic conditions and documents

+ More

Please read carefully all provisions below before the preparation of your application.

Submission Service

To access the Electronic Submission Service of the topic, please select the **type of action** that is most relevant to your proposal from the list below and click on the '**Start Submission**' button. You will then be asked to confirm your choice of the type of action and topic, as these 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 Participant Portal and select the My Proposals page of the My Area section.

Type of Action **Standard EF [MSCA-IF-EF-ST]**

START SUBMISSION

Topic Individual Fellowships - MSCA-IF-2016

Type of Action **RI & Reintegration panel [MSCA-IF-EF-RI]**

START SUBMISSION

Topic Individual Fellowships - MSCA-IF-2016

Type of Action **CAR & Career Restart panel [MSCA-IF-EF-CAR]**

START SUBMISSION

Topic Individual Fellowships - MSCA-IF-2016

Type of Action **Society and Enterprise panel [MSCA-IF-EF-SE]**

START SUBMISSION

Topic Individual Fellowships - MSCA-IF-2016

Type of Action **Global Fellowships [MSCA-IF-GF]**

START SUBMISSION

Topic Individual Fellowships - MSCA-IF-2016

Topic Conditions and Document

Specific provisions and funding rates: please refer to the [MSCA part of the H2020 Work Programme](#).

[MSCA standard self-evaluation form](#)

[H2020 MGA MSC IF – Mono-Beneficiary](#)

[H2020 Annotated Grant Agreement](#)

[Marie Skłodowska-Curie Individual Fellowships \(MSCA IF\)](#)

[Global Fellowships:](#)

Specific provisions and funding rates: please refer to the [MSCA part of the H2020 Work Programme](#).

[MSCA standard self-evaluation form](#)

[H2020 MGA MSC IF – Mono-Beneficiary](#)

[H2020 Annotated Grant Agreement](#)

6. Additional provisions:

[Horizon 2020 budget flexibility](#)

[Classified information](#)

7. **Open access must be granted to all scientific publications resulting from Horizon 2020 actions, and proposals must refer to measures envisaged.** Where relevant, proposals should also provide information on how the participants will manage the research data generated and/or collected during the project, such as details on what types of data the project will generate, whether and how this data will be exploited or made accessible for verification and re-use, and how it will be curated and preserved.

8. Additional documents:

[H2020 Work Programme 2016-17: Introduction](#)

[H2020 Work Programme 2016-17: Marie Skłodowska-Curie actions \(MSCA\)](#)

[H2020 Work Programme 2016-17: Dissemination, Exploitation and Evaluation](#)

[H2020 Work Programme 2016-17: General Annexes](#)

[Legal basis: Horizon 2020 - Regulation of Establishment](#)

[Legal basis: Horizon 2020 Rules for Participation](#)

[Legal basis: Horizon 2020 Specific Programme](#)

[MSCA-IF-2016 Guide for Applicants](#)







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 ('Download template' and 'Upload')
- Proposal should be submitted by the Supervisor
 - Submission system checks ('Validate forms' and 'Print preview')
 - 'Submit' as many times as required until the deadline

Step 5

Edit Proposal

H2020-MSCA-IF-2016

	USER NAME Ian DEVINE
	TOPIC MSCA-IF-2016
	TYPE OF ACTION MSCA-IF-EF-ST
A.B.C.	ACRONYM TEST
	DRAFT ID SEP-210355081
WED 14	DEADLINE (Brussels Local Time) September 2016 17:00:00
139	days left until closure

Configuration OK 

Download Part B
Templates 

[Visit our 'How to' user guide](#) 


[Visit our 'H2020 Online Manual'](#) 

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 yet been submitted...

Administrative Forms

Edit will open the forms in Adobe Reader. 




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 B-Document 1

upload



Part B-Document 2

upload



<< Step 4 - Parties

validate

submit

done 

Version: 20160414-0957 - Service Desk: DIGIT-EFP7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

Part A

Forms

(Marie Skłodowska-Curie Individual Fellowships)

Topic: MSCA-IF-2016

Type of action: MSCA-IF-EF-ST
(Standard EF)

Proposal number: SEP-210355081

Proposal acronym: TEST

Deadline Id: H2020-MSCA-IF-2016

Table of contents

Section	Title	Action
1	General information	Show
2	Participants & contacts	Show
3	Budget	Show
4	Ethics	Show
5	Call-specific questions	Show

[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 previous steps in the submission wizard.

[Read more](#)

done Version: 20160414-0957 - Service Desk: DIGIT-EPF7-SEP-SUPPORT@ec.europa.eu (+32 (2) 29 92222)

**Part A
completed
on-line**

(abstract, acronym, evaluation panel, etc.)

Budget – Automatically Calculated



European Commission
 Research & Innovation - Participant Portal
 Proposal Submission Forms

[Table Of Contents](#)
[Validate Form](#)
[Save and Close](#)

Proposal ID **SEP-210355081** Acronym **TEST** Go to

3 - Budget

Is the Researcher eligible for family allowance? ☐ Yes ☐ No

Participant Number	Organisation Short Name	Country	Country Coefficient	Number of Months	Researcher Unit Cost			Institutional Unit Cost		Total
					Living Allowance	Mobility Allowance	Family Allowance	Research, training and networking costs	Management and Overheads	
1	BBSRC	UK	1,203	24	134254,80	14400,00		19200,00	15600,00	183454,80
Total				24	134254,80	14400,00	0,00	19200,00	15600,00	183454,80

Partner Organisation from Third Country does not sign the Grant Agreement, does not recruit the researcher and does not directly claim costs from the action. The entire EC contribution is transmitted to the Host organisation located in Members States or Associated Countries.

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



Populated based on person months/country

Part B

START PAGE (1 page)

LIST OF PARTICIPATING ORGANISATIONS

START PAGE COUNT (MAX 10 PAGES SECTIONS 1-3)

1. EXCELLENCE
2. IMPACT
3. QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

10 pages

STOP PAGE COUNT (MAX 10 PAGES SECTIONS 1-3)

DOCUMENT 2 (NO OVERALL PAGE LIMIT APPLIED)

4. CV OF THE EXPERIENCED RESEARCHER
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
6. ETHICAL ASPECTS
7. LETTER OF COMMITMENT OF PARTNER ORGANISATION (GF ONLY)

Respect Page Limits!!!

Please note that.

- Applicants must ensure that document 1 does not exceed the total page limit of 13 pages. The Start Page must consist of 1 whole page. The Table of Contents must consist of 1 whole page. The List of Participating Organisations must consist of 1 whole page. Section 1 must start on page 4 of the document. Expert evaluators will be instructed to disregard any excess pages above the 10 page limit. Such excess pages will be watermarked.
- No reference to the outcome of previous evaluations of a similar proposal should be included in the text. Experts will be strictly instructed to disregard any such references.

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
-

Individual Fellowships (IF)

Proposal evaluation

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 in 2014 and 2015

3. 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

Marie Skłodowska-Curie Innovative Training Networks		
Excellence	Impact	Implementation
<i>Scored on a scale of 0-5</i>		
50%	30%	20%
<i>Weighting</i>		
1	2	3
<i>Priority in case of ex aequo</i>		
Overall threshold of 70% applies to total score		

- 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

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**

50%

- 1.1 Quality, innovative aspects and credibility of the research, including inter/multidisciplinary aspects and **gender** (*explicitly added now*)
- 1.2 Quality and appropriateness of the training and the two way transfer of knowledge (in light of the research objectives)
- 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 in research/independence
- +
- Section 4 - CV of the Experienced Researcher

1.1 Quality, innovative aspects and credibility of the research, including inter/multidisciplinary aspects and gender

- Aims of the Research Project:
 - Have clear, focused research objectives and methodology (translated into specific **work packages**)
 - 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);
 - Highlight the **impact** of the project
 - What will be its contribution and how will it advance the area;
 - Highlight all inter- and multidisciplinary aspects;
 - Do not underestimate gender aspects;
 - Explain how will this novel research in turn open up career and collaboration opportunities for the researcher and new collaboration opportunities for the 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 training and the two way transfer of knowledge

- 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;
 - For Global Fellowships, identify how the skills/knowledge gained during the outgoing phase in TC will be transferred back to Europe

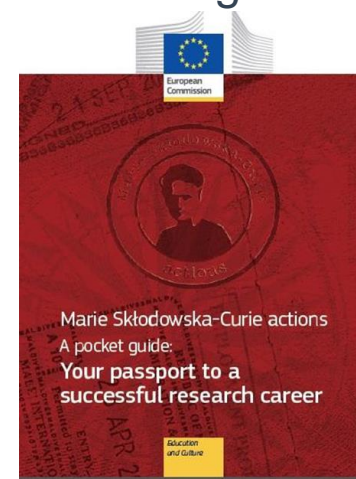
Secondments strongly encouraged!

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:**
 - Measures to ensure the successful integration of the Fellow and transfer of knowledge/skills;
 - Is there an institutional Research Development Strategy – describe it;
 - Consider what the Career Development Plan would look like;
 - For Global fellowships – describe both phases.

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 he/she also develop and grow as a result of the training it offers:
 - *Demonstrate the capacity for independent thinking and leadership;*
 - *Explain how the Fellowship will have an enormous positive impact on the researcher's career.*



Excellence: **positive feedback**

- ▶ 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**

30%

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

*New
structure*

EXPECTED IMPACT

Researcher level	Organisation level	System level
<ul style="list-style-type: none">• Increased set of research-related and transferable skills to improve employability and career prospects both in and outside academia• Increase in higher impact R&I output, more knowledge and ideas converted into products and services• Greater contribution to the knowledge-based economy and society	<ul style="list-style-type: none">• Enhanced cooperation and stronger networks• Better transfer of knowledge between sectors and disciplines• Boosting of R&I capacity among participating organisations	<ul style="list-style-type: none">• Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe• Stronger Europe's human capital base in R&I with more better trained and entrepreneurial researchers• Better communication of R&I results to society• Increase in Europe's attractiveness as a leading destination for R&I• Better quality of R&I contributing to Europe's competitiveness and growth

2.1 Enhancing the potential and future career prospects of the researcher

- Detail the expected impact of the Fellowship (training+research) on the researchers career:
 - Experience of a new country, culture and way of thinking;
 - Development of new skills which may be transferable;
 - New experiences in new sectors through secondments;
 - What are the researcher's goals and how will the Fellowship contribute during and after the project;
 - Specify new competences that will be acquired (*'better trained and entrepreneurial researcher'*)
- Be precise as to how this will be achieved through the project



2.2 Quality of the proposed measures to exploit and disseminate the action results

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 public policymaking

- How the exploitation and dissemination strategy will ensure impact of the project on relevant levels (science, society, economy)?
 - how will research results be transferred to potential users, scientists, society?
 - if appropriate, present commercialisation plans, consider IPR arrangements
- Consider how might it benefit EU citizens;
 - What could be the potential economic impact;
 - Does it fit with EU strategies and policies – e.g. Europe 2020, aims of Horizon 2020;
 - To what extent is it innovative – e.g. could it lead to a product or service

[Marie Curie Outreach Guidance](#)

[European Charter for Research](#)

[Online Manual – Dissemination & Exploitation](#)

2.3 Quality of the proposed measures to communicate the action activities to different target audiences

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.

- Prepare detailed communication strategy and timeline (include in in the Gantt Chart)
- Have clear communication goals and objectives; define audiences
- Use the right medium and means, if possible use dissemination partners and multipliers
- Go beyond the obvious

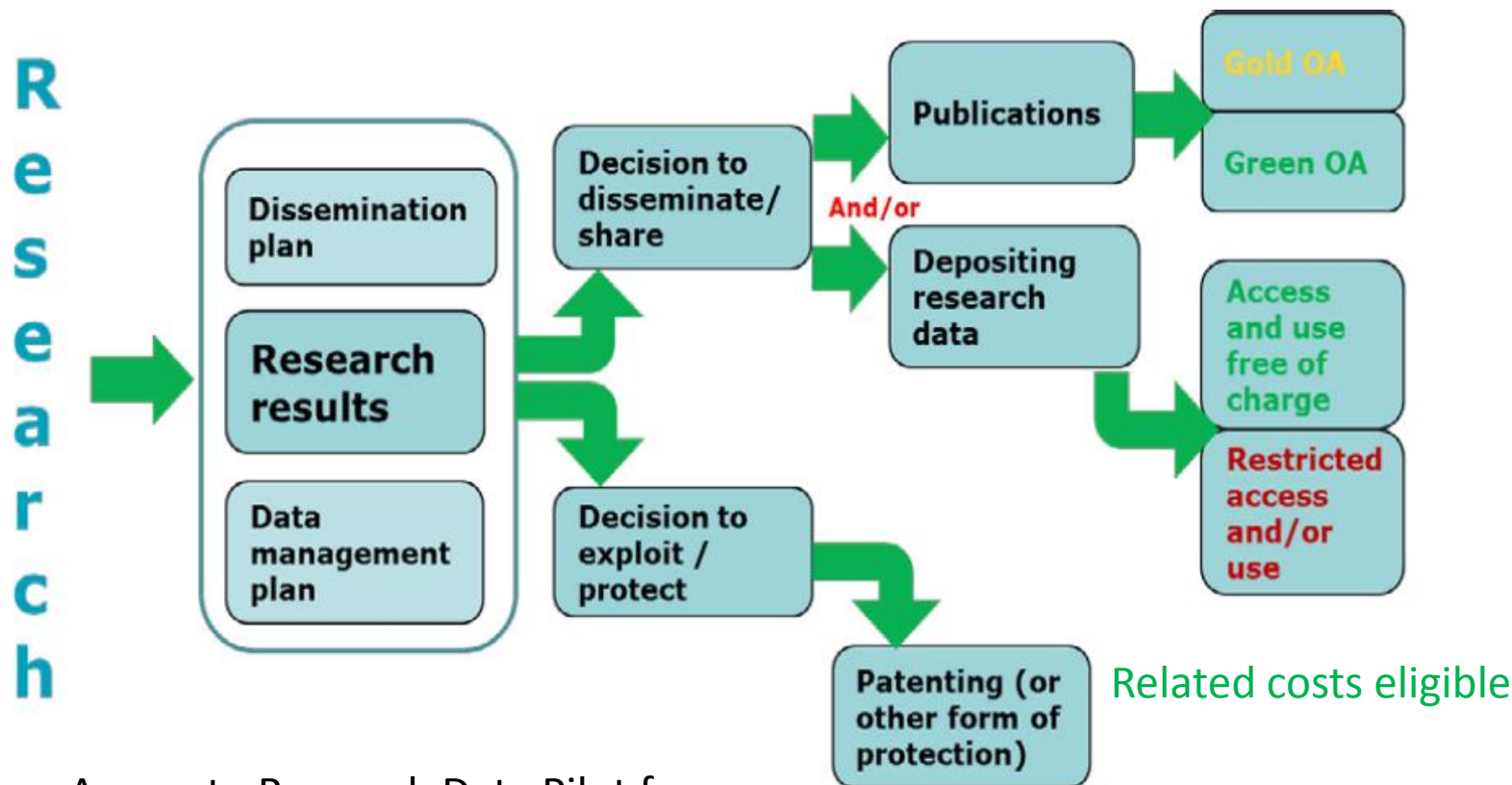
[Online Manual – Communicating your Project](#)



[Communicating EU research and innovation guidance for project participants](#)

Dissemination of results - Open Access

Obligation to provide open access when publishing



Open Access to Research Data Pilot for some areas mandatory, otherwise opt-in.

Source: European Commission

Useful resources

www.openaire.eu

The screenshot displays the OpenAIRE website interface. At the top, there is a navigation bar with social media icons, a newsletter sign-up, and login/register options. Below this is a main navigation menu with links to Home, Open Access, and Open Access in H2020. The central content area features an article titled "Open Access in Horizon 2020" with a summary paragraph and a "Read more" button. To the right of the article is a blue sidebar menu containing a list of resources: FAQ, CONTENT ACQUISITION POLICY, ASK A QUESTION, GUIDES, H2020 FACTSHEETS, COPYRIGHT ISSUES, EC RESOURCES, RELATED LINKS, TUTORIALS / WORKSHOPS, OPENAIRE LEGAL STUDY, and GLOSSARY. Below the main article, there is another section titled "Open access to research data: the Open Research Data Pilot" with a similar "Read more" button. The bottom of the page shows a red footer bar.

OpenAIRE

Home | Open Access | Open Access in H2020

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 (see Article 29 "Dissemination of results - Open Access - Visibility of EU funding: pages 60-63 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](#)

[Read more](#)

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](#)

[Read more](#)

- FAQ
- CONTENT ACQUISITION POLICY
- ASK A QUESTION
- GUIDES
- H2020 FACTSHEETS
- COPYRIGHT ISSUES
- EC RESOURCES
- RELATED LINKS
- TUTORIALS / WORKSHOPS
- OPENAIRE LEGAL STUDY
- GLOSSARY

Horizon 2020 IPR

- For further information see:

www.iprhelpdesk.eu

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

[www.iprhelpdesk.eu/sites/default/files/newsdocuments/How to manage IP in H2020 at the grant preparation stage.pdf](http://www.iprhelpdesk.eu/sites/default/files/newsdocuments/How_to_manage_IP_in_H2020_at_the_grant_preparation_stage.pdf)

IPR Helpdesk – IP in MSCA Factsheet:

[https://www.iprhelpdesk.eu/sites/default/files/newsdocuments/FS IP management in MSCA-H2020 v1.0.pdf](https://www.iprhelpdesk.eu/sites/default/files/newsdocuments/FS_IP_management_in_MSCA-H2020_v1.0.pdf)



The screenshot shows the homepage of the European IPR Helpdesk. At the top, there is a blue header with the European Commission logo and the text "EUROPEAN IPR HELPDESK" and "Get your ticket to innovation!". Below the header is a navigation bar with a "quick search" box and several colored buttons: "services", "news", "events", "library", "training", "ambassador", and "helpline". The main content area features a "New Case Study" section titled "Spin-offs: an innovative idea is only the starting point" with a large "OPTICS" logo. Below this is a section titled "Get your ticket to innovation!" with a paragraph explaining the Helpdesk's mission. To the right, there is a "follow us" section with social media icons for RSS, LinkedIn, and Twitter, and a "newsletter sign up here" button. At the bottom, there is an "IP SME Corner" section with a blue button labeled "IP SME Corner" and a paragraph about the "Helpline service".

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.

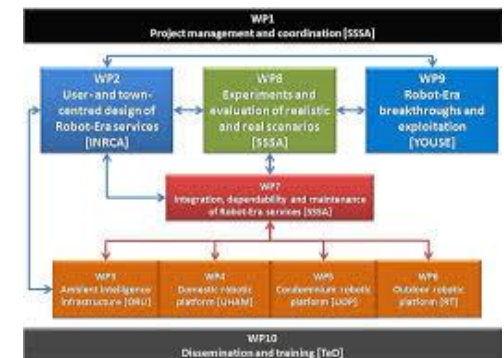
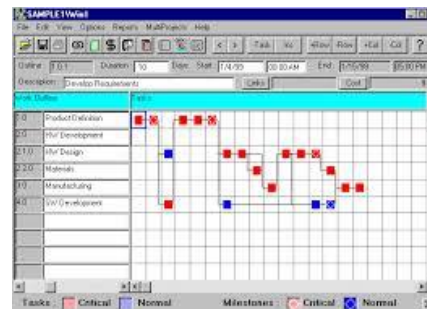
Impact: **negative feedback**

- ▶ 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

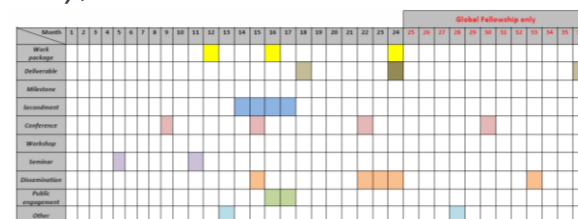
20%

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



3.1 Coherence and effectiveness of the work plan

- 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.*



3.2 Appropriateness of the allocation of tasks and resources

- Explain how the work plan and resources mobilised will ensure the success
- Explain why the amount of person-months is appropriate

3.3 Appropriateness of the management structure and procedures, including risk management

- Describe the project organisation and management structure:
 - Financial management structure – *may even be a transferable skill to be developed by Fellow;*
 - What progress monitoring will be in place.
- What are the potential risks that could jeopardise the project:
 - What level of contingency planning will be in place.



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) – details of what to include in guide for applicants.



NB: Each participant is described in Section 5. This specific information should not be repeated here!

Implementation: **positive feedback**

- ▶ The administrative arrangements and support for the hosting of the applicant are sufficiently outlined.
- ▶ The workplan 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.

Implementation: **negative feedback**

- ▶ 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.

Other Key Considerations

- **Operational capacity of the organisations**

- Use well tables in Section 5 of Part B
- Profile of key staff, description of key infrastructure or technical equipment, all partner organisations contributing towards the proposed work

Slightly different information for Beneficiary and Partner, but 1 page each.

- **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

http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/ethics/h2020_hi_et_hics-self-assess_en.pdf



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
- **Horizon 2020 Manual**, part on Gender equality:
http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/gender_en.htm
- **H2020 Gender Advisory Group** paper on preparing grants that integrate the gender dimension into research.
<http://ec.europa.eu/transparency/regexpert/index.cfm?do=groupDetail.groupDetailDoc&id=18892&no=1>

Gender equality

GENDER EQUALITY IN HORIZON 2020

Gender equality concerns **all parts** of Horizon 2020. When drafting your proposal, you need to pay attention to gender equality from different angles, in terms of:

1. *Human resources*: balance between women and men in the research **teams** who will implement your project
2. *Content*: analysing and taking into account the possible differences between men and women, boys and girls, or males and females, in the research and innovation **content** of your project.

GENDER BALANCE IN RESEARCH TEAMS AT ALL LEVELS

When **applying** for a grant under Horizon 2020, you are encouraged to promote gender balance at all levels in your teams and in management structures. Applicants should seek at having a balanced participation, as close as possible to 50/50, of both men and women in the teams and among the leading roles.

At the **evaluation stage**, gender balance in staff is one of the ranking factors that come into play to prioritise the proposals above the threshold with same scores. When it is used, evaluators need to compare the shares of men and women in the personnel named in the proposals (in Part B, section 4.1, of the proposal template) and they will rank higher the proposal with the share closer to 50/50.

[More on the use of gender balance as a ranking factor](#)

INTEGRATING THE GENDER DIMENSION IN THE CONTENT OF RESEARCH AND INNOVATION

When **applying** for a grant under Horizon 2020, you are invited to explore whether and how the gender dimension is relevant to your research. In the proposal template (section 1.3), you are asked to "describe how sex and/or gender analysis is taken into account in the project's content".

Responsible Research and Innovation

“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

https://ec.europa.eu/research/swafs/pdf/rome_declaration_RRI_final_21_November.pdf

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

http://ec.europa.eu/research/swafs/pdf/pub_rri/rri_indicators_final_version.pdf

Open Science: <https://ec.europa.eu/digital-agenda/en/open-science>

Responsible research & innovation

Responsible research and innovation is an approach that anticipates and assesses potential implications and societal expectations with regard to research and innovation, with the aim to foster the design of inclusive and sustainable research and innovation.



Responsible Research and Innovation (RRI) implies that societal actors (researchers, citizens, policy makers, business, third sector organisations, etc.) work together during the whole research and innovation process in order to better align both the process and its outcomes with the values, needs and expectations of society.

In practice, RRI is implemented as a package that includes multi-actor and **public engagement in research and innovation**, enabling easier access to scientific results, the take up of gender and ethics in the research and innovation content and process, and formal and informal science education.

Implementing RRI in Horizon 2020

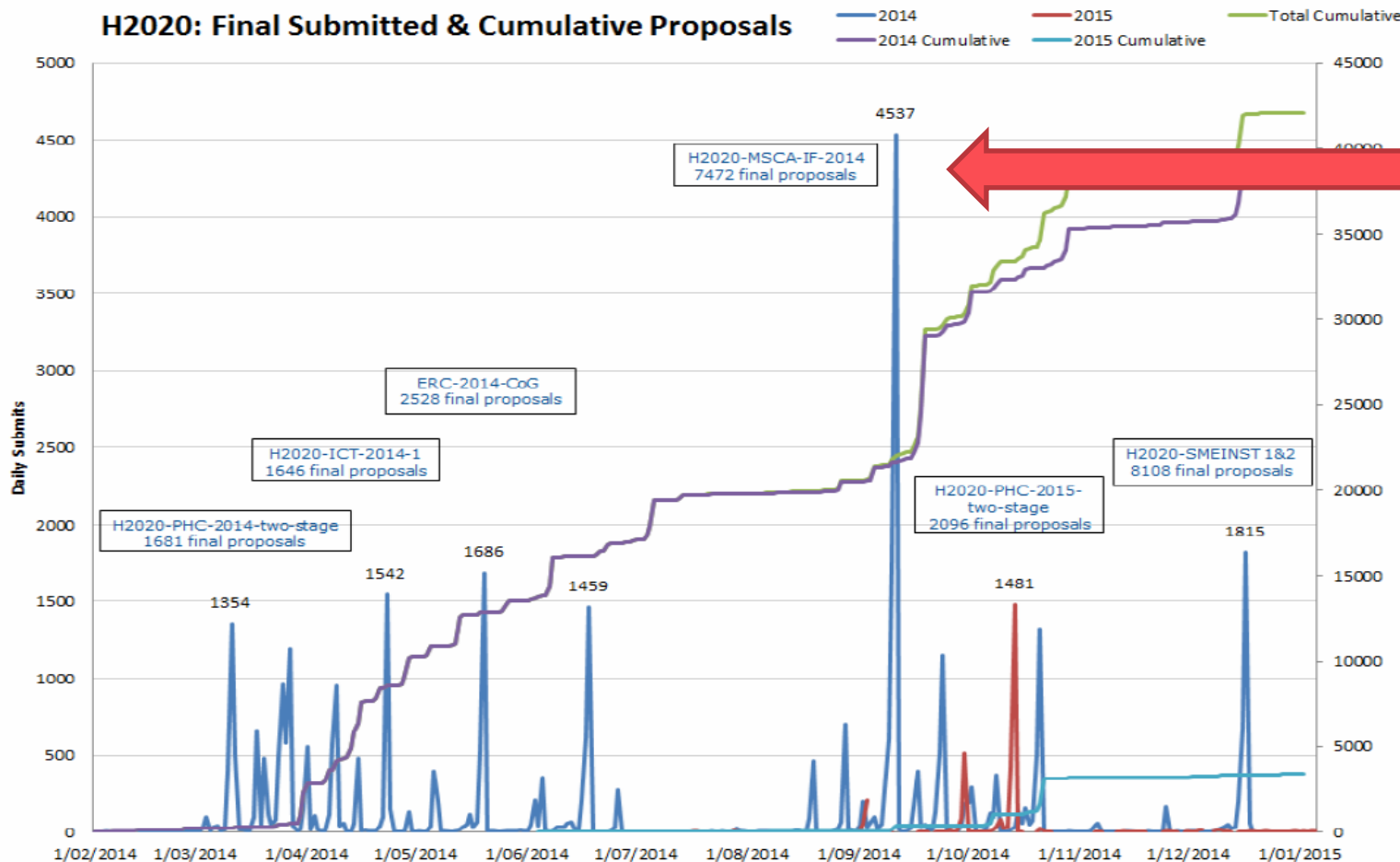
Responsible research and innovation is key action of the 'Science with and for Society' objective. RRI actions will be promoted via 'Science with and for Society' objective via:

- actions on thematic elements of RRI (**public engagement**, **open access**, **gender**, **ethics**, **science education**), and
- via integrated actions that for example promote institutional change, to foster the uptake of the RRI approach by stakeholders and institutions.

<https://ec.europa.eu/programmes/horizon2020/en/h2020-section/responsible-research-innovation>

Submission Trends

H2020: Final Submitted & Cumulative Proposals



IF - highest submission rate in H2020 during 2014 – **submit early!**

Final tips

- Set aside enough time
- Clarify your own goals for applying
- Read all Call documentation (i.e. Guide for Applicants and Work Programme) - also consider relevant EU policy documents
- Fully appreciate the evaluation criteria; think **IMPACT!**
- Help evaluators (success is in detail!)
 - Clearly address the main objectives
 - Use clear and concise language
 - Explain country specific jargon
 - Provide them with the evidence they need
- Discuss with and meet the supervisor/fellow
- Research previous and current projects
- Find colleagues to read it through, with the evaluation criteria in hand

Abstract – Have a story to tell...

“Needs to be simple and concise. Include all the essential information needed in order to evaluators the ‘first & best’ idea” (*MSCA evaluator’s advice*)

- Make the relevance very clear
- Clearly but shortly explain what you are going to do
- Explain relation to host institution and potential outcomes
- Highlight impact

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
-

MSCA Useful Links

- Individual Fellowship Call Page 2016

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/2226-msca-if-2016.html>

- Horizon 2020/MSCA website

<http://ec.europa.eu/programmes/horizon2020/en/h2020-section/marie-sklodowska-curie-action>

- 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

http://ec.europa.eu/research/mariecurieactions/documents/documentation/publications/guidelines_en.pdf

- IPR Helpdesk – IP in MSCA Factsheet:

https://www.iprhelpdesk.eu/sites/default/files/newsdocuments/FS_IP_management_in_MSCA-H2020_v1.0.pdf