

Part B-1

1 Excellence

1.1 Quality and pertinence of the project's research and innovation objectives

At a minimum, address the following aspects:

- Describe the quality and pertinence of the R&I objectives; are the objectives measurable and verifiable? Are they realistically achievable?
- Describe how your project goes beyond the state-of-the-art, and the extent to which the proposed work is ambitious.

1.2 Soundness of the proposed methodology

At a minimum, address the following aspects:

- *Overall methodology*: Describe and explain the overall methodology, including the concepts, models and assumptions that underpin your work. Explain how this will enable you to deliver your project's objectives. Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them.
- *Integration of methods and disciplines to pursue the objectives*: Explain how expertise and methods from different disciplines will be brought together and integrated in pursuit of your objectives. If you consider that an inter-disciplinary¹ approach is unnecessary in the context of the proposed work, please provide a justification.
- *Gender dimension and other diversity aspects*: Describe how the gender dimension and other diversity aspects are taken into account in the project's research and innovation content. If you do not consider such a gender dimension to be relevant in your project, please provide a justification.
 - Remember that that this question relates to the content of the planned research and innovation activities, and not to gender balance in the teams in charge of carrying out the project.
 - Sex, gender and diversity analysis refers to biological characteristics and social/cultural factors respectively. For guidance on methods of sex / gender analysis and the issues to be taken into account, please refer to [this page](#).
 - If you plan to use, develop and/or deploy artificial intelligence (AI) based systems and/or techniques you must demonstrate their technical robustness. AI-based systems or techniques should be, or be developed to become:
 - * technically robust, accurate and reproducible, and able to deal with and inform about possible failures, inaccuracies and errors, proportionate to the assessed risk they pose,
 - * socially robust, in that they duly consider the context and environment in which they operate,
 - * reliable and function as intended, minimizing unintentional and unexpected harm, preventing unacceptable harm and safeguarding the physical and mental integrity of humans,
 - * able to provide a suitable explanation of their decision-making processes, whenever they can have a significant impact on people's lives.

¹Interdisciplinarity means the integration of information, data, techniques, tools, perspectives, concepts or theories from two or more scientific disciplines.

- *Open science practices*: Describe how appropriate open science practices are implemented as an integral part of the proposed methodology. Show how the choice of practices and their implementation is adapted to the nature of your work in a way that will increase the chances of the project delivering on its objectives [e.g. up to 1/2 page, including research data management]. If you believe that none of these practices are appropriate for your project, please provide a justification here.

Open science is an approach based on open cooperative work and systematic sharing of knowledge and tools as early and widely as possible in the process. Open science practices include early and open sharing of research (for example through pre-registration, registered reports, pre-prints, or crowd-sourcing); research output management; measures to ensure reproducibility of research outputs; providing open access to research outputs (such as publications, data, software, models, algorithms, and workflows); participation in open peer-review; and involving all relevant knowledge actors including citizens, civil society and end users in the co-creation of R&I agendas and contents (such as citizen science).

Please note that this does not refer to outreach actions that may be planned as part of the communication, dissemination and exploitation activities. These aspects should instead be described below under “Impact”.

- *Research data management and management of other research outputs*: Applicants generating/collecting data and/or other research outputs (except for publications) during the project must explain how the data will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable).

For guidance on open science practices and research data management, please refer to the relevant section of the [HE Programme Guide](#) on the Funding & Tenders Portal.

Please also see the “how to evaluate open science in Horizon Europe proposals” video on the [Funding & Tenders portal](#).

1.3 Quality of the supervision, training and of the two-way transfer of knowledge between the researcher and the host

At a minimum, address the following aspects:

- Describe the qualifications and experience of the supervisor(s). Provide information regarding the supervisors’ level of experience on the research topic proposed and their track record of work, including main international collaborations, as well as the level of experience in supervising/training, especially at advanced level (i.e. PhD and postdoctoral researchers).
- Planned training activities for the researcher (scientific aspects, management/organisation, horizontal and key transferrable skills...).
- For *European Fellowships*: two-way transfer of knowledge between the researcher and host organisation.
- For *Global Fellowships*: three-way transfer of knowledge between the researcher, host organisation, and associated partner for outgoing phase.
- Rationale and added-value of the non-academic placement (if applicable).

Employers and/or founders should ensure that a person is clearly identified to whom researchers can refer for the performance of their professional duties, and should inform the researchers accordingly.

Such arrangements should clearly define that the proposed supervisors are sufficiently expert in supervising research, have the time, knowledge, experience, expertise and commitment to be able to offer the postdoctoral

researcher appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms.

Supervision is one of the crucial elements of successful research. Guiding, supporting, directing, advising and mentoring are key factors for a researcher to pursue his/her career path. In this context, all MSCA-funded projects are encouraged to follow the recommendations outlined in the [MSCA Guidelines on Supervision](#)².

1.4 Quality and appropriateness of the researcher's professional experience, competences and skills

Discuss the quality and appropriateness of the researcher's existing professional experience in relation to the proposed research project.

2 Impact

2.1 Credibility of the measures to enhance the career perspectives and employability of the researcher and contribution to his/her skills development

At a minimum, address the following aspects:

- Specific measures to enhance career perspectives and employability of the researcher inside and/or outside academia.
- *Expected* contribution of proposed skills development to the future career of the researcher.

2.2 Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities

At a minimum, address the following aspects:

- *Plan for the dissemination and exploitation activities, including communication activities*³: Describe the planned measures to maximize the impact of your project by providing a first version of your 'plan for the dissemination and exploitation including communication activities'. Describe the dissemination, exploitation measures that are planned, and the target group(s) addressed (e.g. scientific community, end users, financial actors, public at large). Regarding communication measures and public engagement strategy, the aim is to inform and reach out to society and show the activities performed, and the use and the benefits the project will have for citizens. Activities must be strategically planned, with clear objectives, start at the outset and continue through the lifetime of the project. The description of the communication activities needs to state the main messages as well as the tools and channels that will be used to reach out to each of the chosen target groups.
- *Strategy for the management of intellectual property, foreseen protection measures*: if relevant, discuss the strategy for the management of intellectual property, foreseen protection measures, such as patents, design rights, copyright, trade secrets, etc., and how these would be used to support exploitation.
- All measures should be proportionate to the scale of the project, and should contain concrete actions to be implemented both during and after the end of the project.

²While the MSCA Guidelines on Supervision are non-binding, funded-projects are strongly encouraged to take them into account.

³In case your proposal is selected for funding, a more detailed Dissemination and Exploitation plan will need to be provided as a mandatory project deliverable during project implementation.

2.3 The magnitude and importance of the project's contribution to the expected scientific, societal and economic impacts

- Provide a narrative explaining how the project's results are expected to make a difference in terms of impact, beyond the immediate scope and duration of the project. The narrative should include the components below, tailored to your project.
- Be specific, referring to the effects of your project, and not R&I in general in this field. State the target groups that would benefit. Partial alignment of text with standard application form template for criteria 2.3
 - *Expected scientific impact(s)*: e.g. contributing to specific scientific advances, across and within disciplines, creating new knowledge, reinforcing scientific equipment and instruments, computing systems (i.e. research infrastructures);
 - *Expected economic/technological impact(s)*: e.g. bringing new products, services, business processes to the market, increasing efficiency, decreasing costs, increasing profits, contributing to standards' setting, etc.
 - *Expected societal impact(s)*: e.g. decreasing CO2 emissions, decreasing avoidable mortality, improving policies and decision-making, raising consumer awareness.
- Only include such outcomes and impacts where your project would make a significant and direct contribution. Avoid describing very tenuous links to wider impacts.
- Give an indication of the magnitude and importance of the project's contribution to the expected outcomes and impacts, should the project be successful. Provide quantified estimates where possible and meaningful.

"Magnitude" refers to how widespread the outcomes and impacts are likely to be. For example, in terms of the size of the target group, or the proportion of that group, that should benefit over time.

"Importance" refers to the value of those benefits. For example, number of additional healthy life years; efficiency savings in energy supply.

3 Quality and Efficiency of the Implementation

3.1 Quality and effectiveness of the work plan, assessment of risks and appropriateness of the effort assigned to work packages

At a minimum, address the following aspects:

- Brief presentation of the overall structure of the work plan, including deliverables and milestones.
- Timing of the different work packages and their components;
- Mechanisms in place to assess and mitigate risks (of research and/or administrative nature).

A Gantt chart must be included and should indicate the proposed Work Packages (WP), major deliverables, milestones, secondments, placements. This Gantt chart counts towards the 10-page limit. The schedule in the Gantt chart should indicate the number of months elapsed from the start of the action (Month 1).

3.2 Quality and capacity of the host institutions and participating organisations, including hosting arrangements

At a minimum, address the following aspects:

- Hosting arrangements, including integration in the team/institution and support services available to the researcher.
- Quality and capacity of the participating organisations, including infrastructure, logistics and facilities should be outlined in Part B-2 Section 5 (“Capacity of the Participating Organisations”).

Note that for GF, both the quality and capacity of the outgoing Third Country host and the return host should be outlined.

Associated partners linked to a beneficiary⁴

If applicable, outline here the involvement of any ‘associated partners linked to a beneficiary’ (in particular, the name of the entity, the type of link with the beneficiary and the tasks to be carried out).

⁴See the definitions section of the MSCA Work Programme for further information.