



# ***MARIE SKŁODOWSKA-CURIE ACTIONS***

## **Individual Fellowships (IF)**

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**Research Executive Agency**

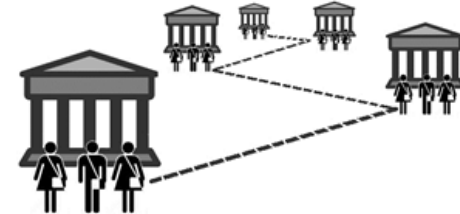
**24<sup>th</sup> June 2016**  
**Orsay**

# MSCA in H2020



**IF**

Individual Fellowships



**RISE**

Research and Innovation  
Staff Exchange



**ITN**

Innovative Training Networks



**COFUND**

Co-funding of regional, national  
and international programmes

## IF 2016: Topics & Budget

EF

**European  
Fellowships**

*held in EU Member States or  
Associated Countries*

**189.5 M€**

GF

**Global  
Fellowships**

*based on an outgoing phase  
to a third country and a  
return phase in MS/AC*

**29 M€**

Call Opening:	<b>12 April 2016</b>
Call Deadline:	<b>14 September 2016, 17h00</b> CET/Brussels time
Evaluation:	<b>October – December 2016</b>
Launch Grant preparation:	<b>January 2017</b>
Budget:	<b>218.5 million €</b>

## What are IFs?

- Individual trans-national fellowships to the best and most promising **experienced\*** researchers  
(\* PhD or 4-year full-time equivalent research experience)

### European Fellowships (EF)

Career  
Restart Panel  
(CAR)

Reintegration  
Panel  
(RI)

Society and  
Enterprise  
Panel (SE)

**NEW!**

### Global Fellowships (GF)

- ✓ Specific eligibility criteria
- ✓ Strengthening **networking capabilities** for both researchers and involved organizations
- ✓ **Secondments** of 3 – 6 months in Europe (MS or AC), for greater impact
- ✓ Career development with an appropriate **inter-sectoral** dimension (open to **hosts from both** academic and non-academic sectors)

# IF - Topics: European and Global



European  
Fellowships

**For fellows coming to or moving  
within Europe  
(12-24 months)**

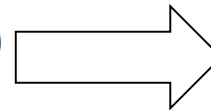
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**Any Experienced Researcher  
may submit only one proposal  
to this call for proposals.**



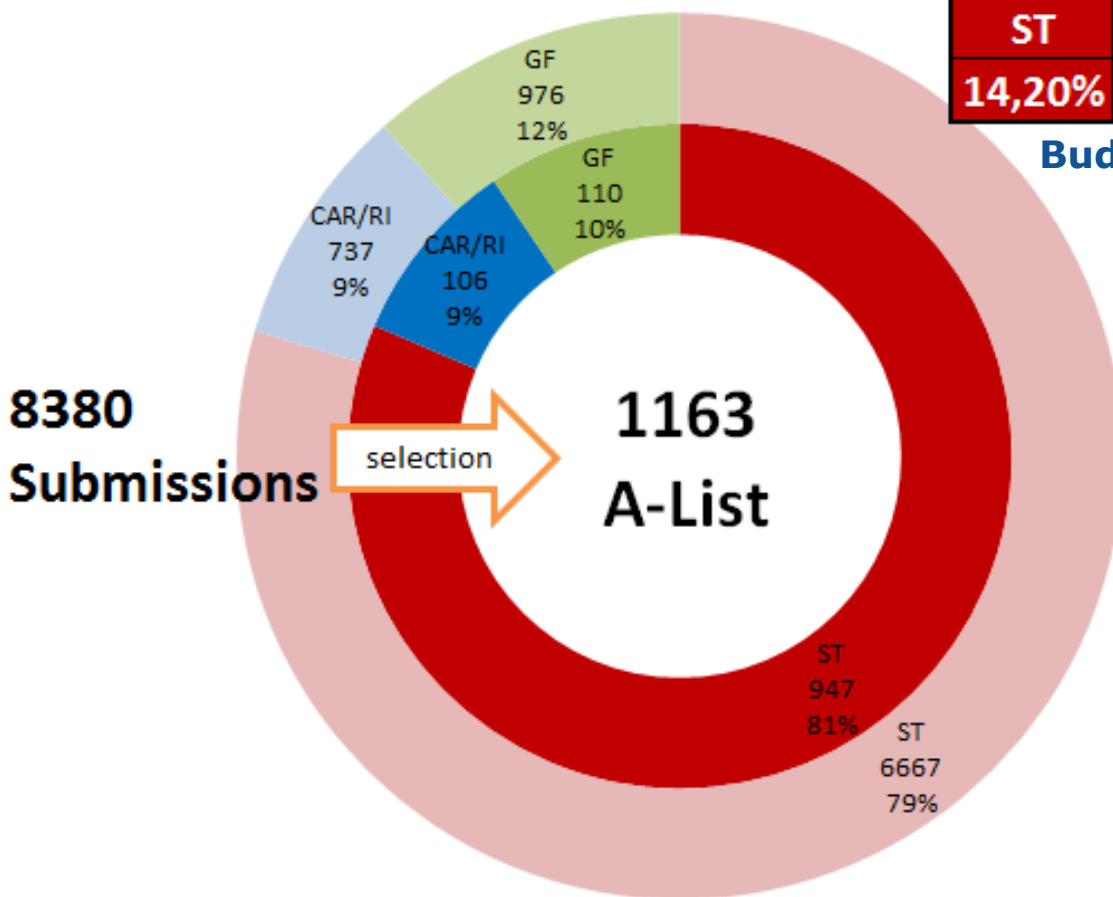
Global  
Fellowships

**For fellows from Europe  
going to Third countries (12-24 months)  
returning to Europe (12 months)**



**TOT. = 24/36 months**

# IF 2015: Submitted & Main (A) list proposals (eligible)



Success rate		
ST	CAR/RI	GF
14,20%	14,38%	11,27%

**Budget (215 M€)**

**IF 2014:**  
**higher budget** (240,5 M€)  
**less proposals** (7409/1306)  
**higher success rate**

Success rate			
ST	CAR	RI	GF
18,62%	18,23%	18,96%	11,37%



## 1. Member States (MS) – 28 countries (incl. linked Overseas Countries and Territories)

- Iceland
- Norway
- Albania
- Bosnia and Herzegovina
- the former Yugoslav Republic of Macedonia
- Montenegro
- Serbia

## 2. Associated Countries (AC)

- Turkey
- Israel
- Moldova
- Switzerland
- Faroe Islands
- Ukraine
- Tunisia
- Georgia

## 3. Third Countries (TC): any other country



EU Validation Services ultimately determine the sector of every participating organisation

## Academia

Public or private **higher education establishment** awarding academic degrees

Public or private **non-profit research organisations**

International **European interest** organisations



## Non-academia

### Broad definition:

Any socio-economic actor not included in the academic sector definition





## **Project:**

- **written by the experienced researcher**
- **a concrete plan of training-through-research**
- **at the host organisation's premises**
- **under the direct supervision of the Supervisor(s)**

Realistic and well-defined objective in terms of career advancement (e.g. by attaining a leading independent position) or resuming a research career after a break.

*Typical training activities may include:*

- Primarily training-through-research: individual personalised action
- Hands-on training activities for developing scientific (new techniques, instruments ...) and transferable skills (proposal preparation to request funding, IPR management , task coordination, supervising & monitoring, exploitation of research results ...)
- Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments)
- Organisation of scientific/training/dissemination events
- Communication, outreach activities and horizontal skills
- Training dedicated to gender issues

# Secondments



*Transfer of knowledge which contributes significantly to the impact of the fellowship.*

**When:** during the implementation of the project  
**Who:** the Experienced Researcher  
**Where:** to Partner Organisation in Europe (MS/AC)  
**How long:**

Fellowship Duration	Maximum duration of secondment
≤ <b>18</b> months	<b>3</b> months
> <b>18</b> months	<b>6</b> months

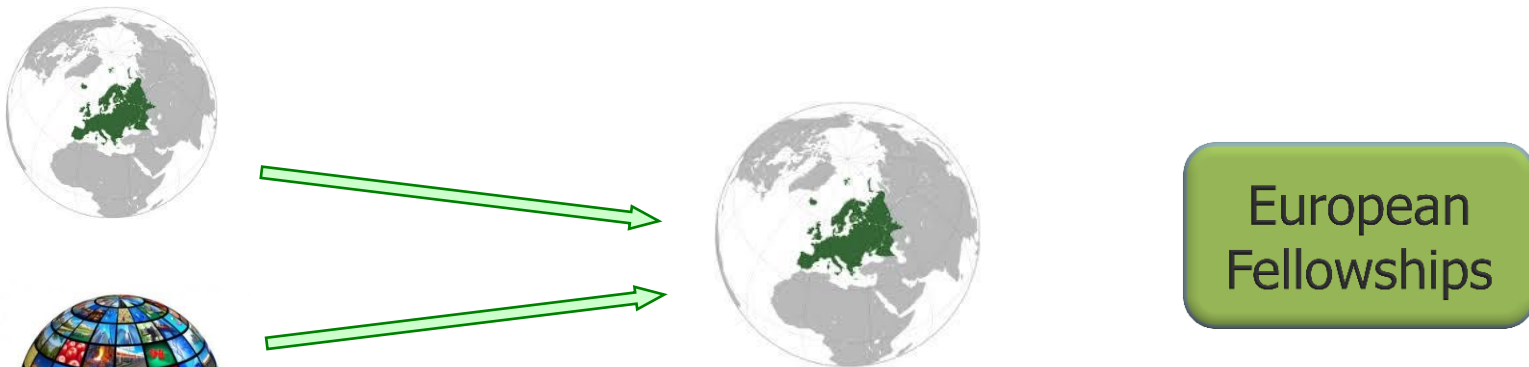
- Secondment: clearly described in proposal (not necessarily the institution!)
- single period or divided into shorter mobility periods
- can be at more than one partner organisation
- can be to an Institution in the same country as the Beneficiary
- can be in the same sector (academic-academic)
- No letter of commitment needed
- Different from **short visit** (e.g. field work), that can be done in a TC



	Researcher unit cost [person/month]			Institutional unit cost [person/month]	
	Living allowance*	Mobility allowance	Family allowance	Research, training & networking costs	Management & indirect costs
Individual Fellowships	4 650	600	500	800	650

\*adjusted through the application of a country correction coefficient

# European Fellowships (EF)



**For fellows coming to or moving  
within Europe  
(12-24 months)**

**An Experienced Researcher  
may submit only one proposal  
to this call for proposals.**

One experienced researcher applies with one host institution for a research project that can last between 12 and 24 months.

## Host Institution (future Beneficiary)

- **Location:** MS or AC
- **Sector:** Academic or Non-academic
- **International European Interest Organisation (IEIO)**
- **International Organisation** (*exceptional cases*)

**Appoints the Supervisor**

**Recruits the experienced researcher (contract of employment)**

## Researcher (future Fellow)

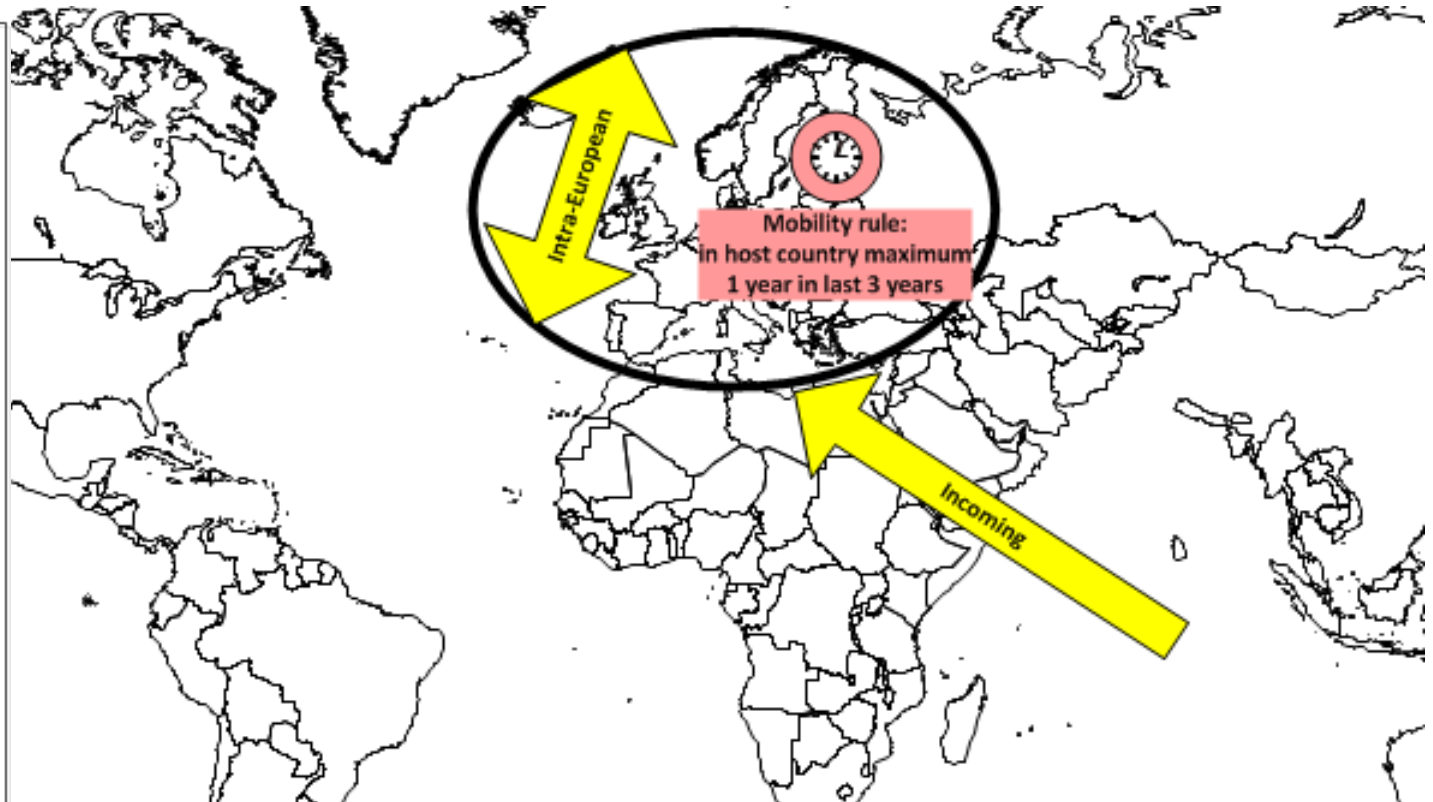
- **Must undertake transnational mobility**
- **Nationality: any** (exception for RI panel)

# EF-ST Standard European Fellowships



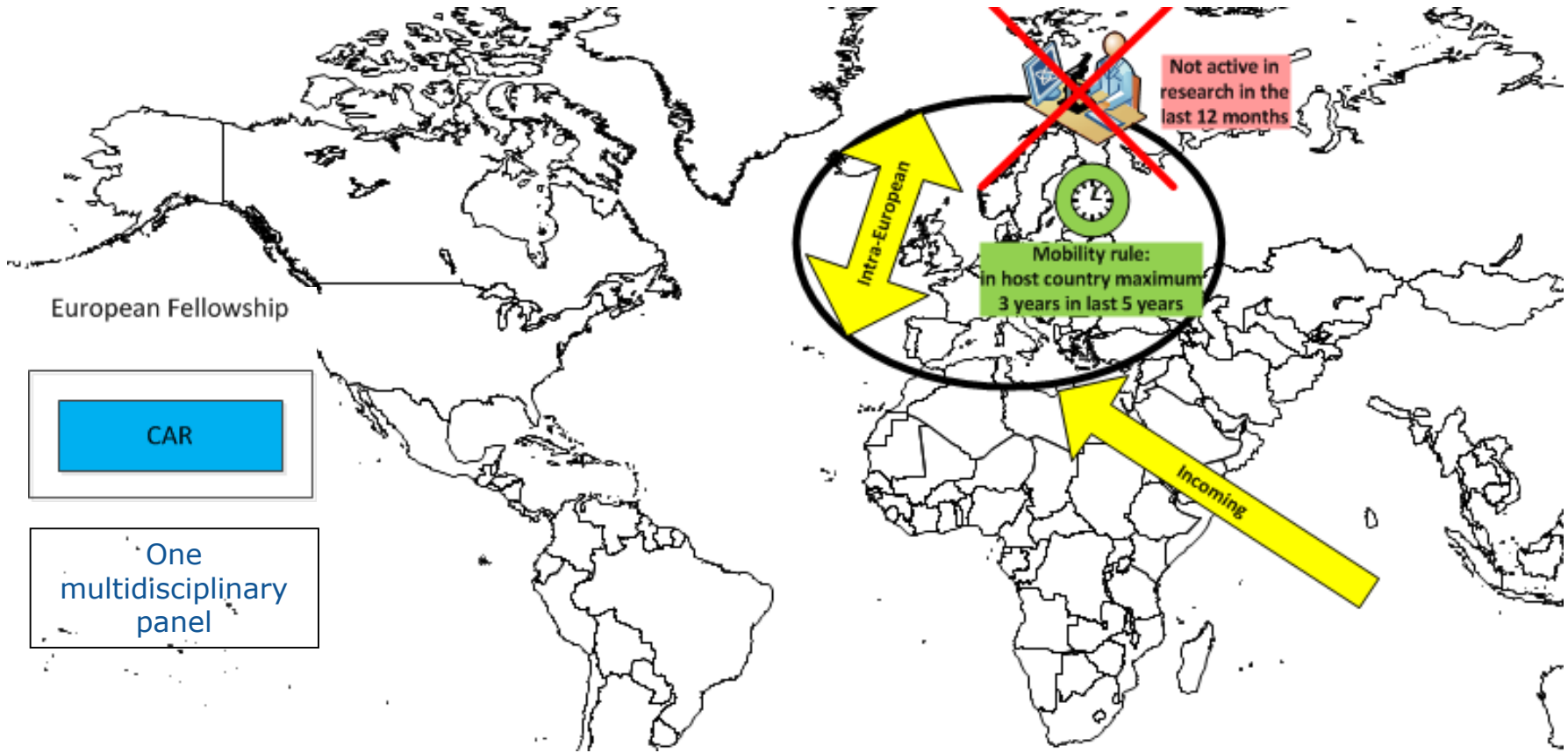
## European Fellowship

CHE
SOC
ECO
ENG
ENV
LIF
MAT
PHY



# EF – CAR

## Career Restart Panel





Definition of **career break in research**:

i.e. **not have been *active in research*** for at least 12 months immediately prior to the deadline for submission of proposals (15/09/15 to 14/09/16).

***Active in research***: determined on the basis of

**A. fellowships or**

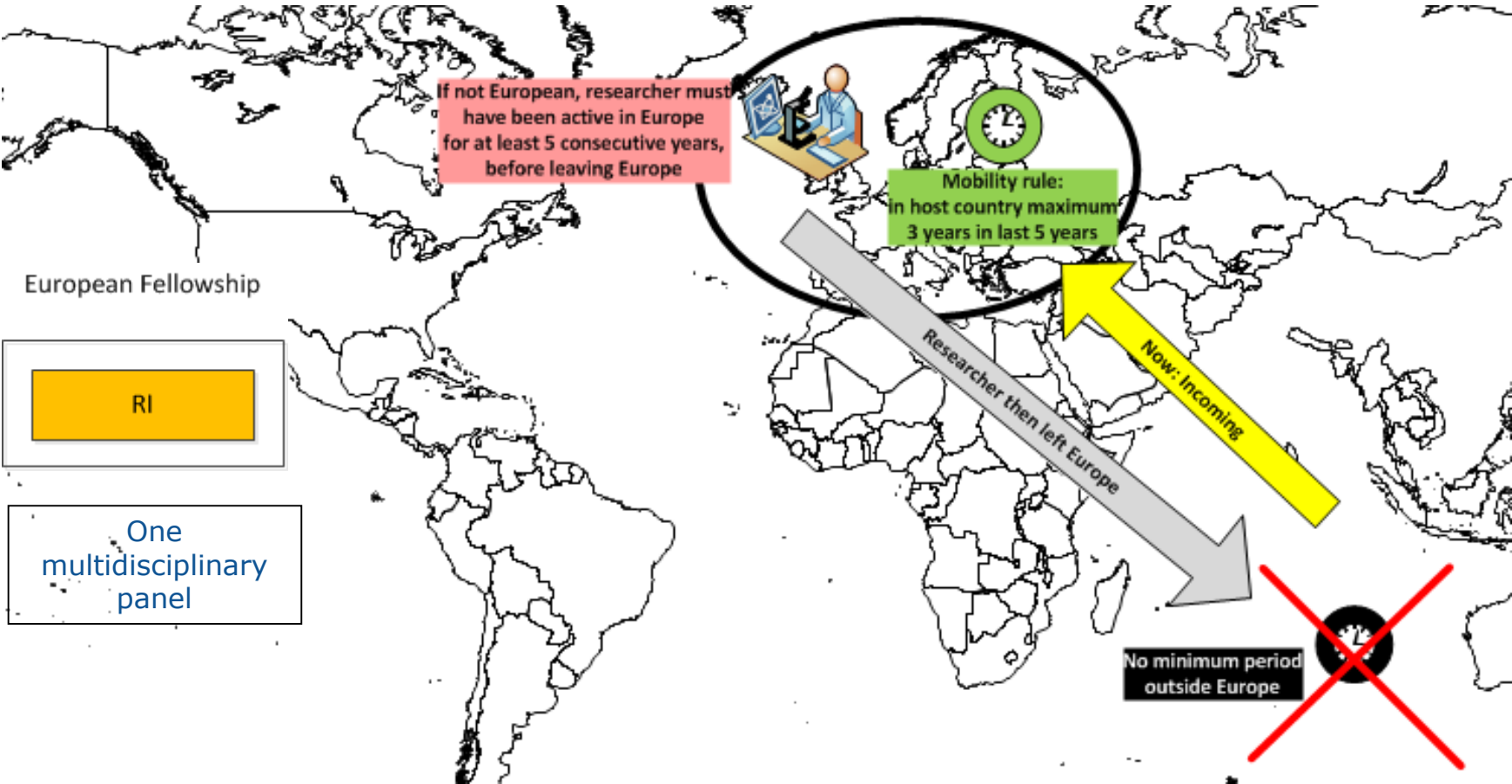
**B. employment contracts**

**Professional status** to be clearly explained in the proposal, both **in part A and B**:

*e.g. unemployment, parental/sick leave, no fellowship/employment contract in research*



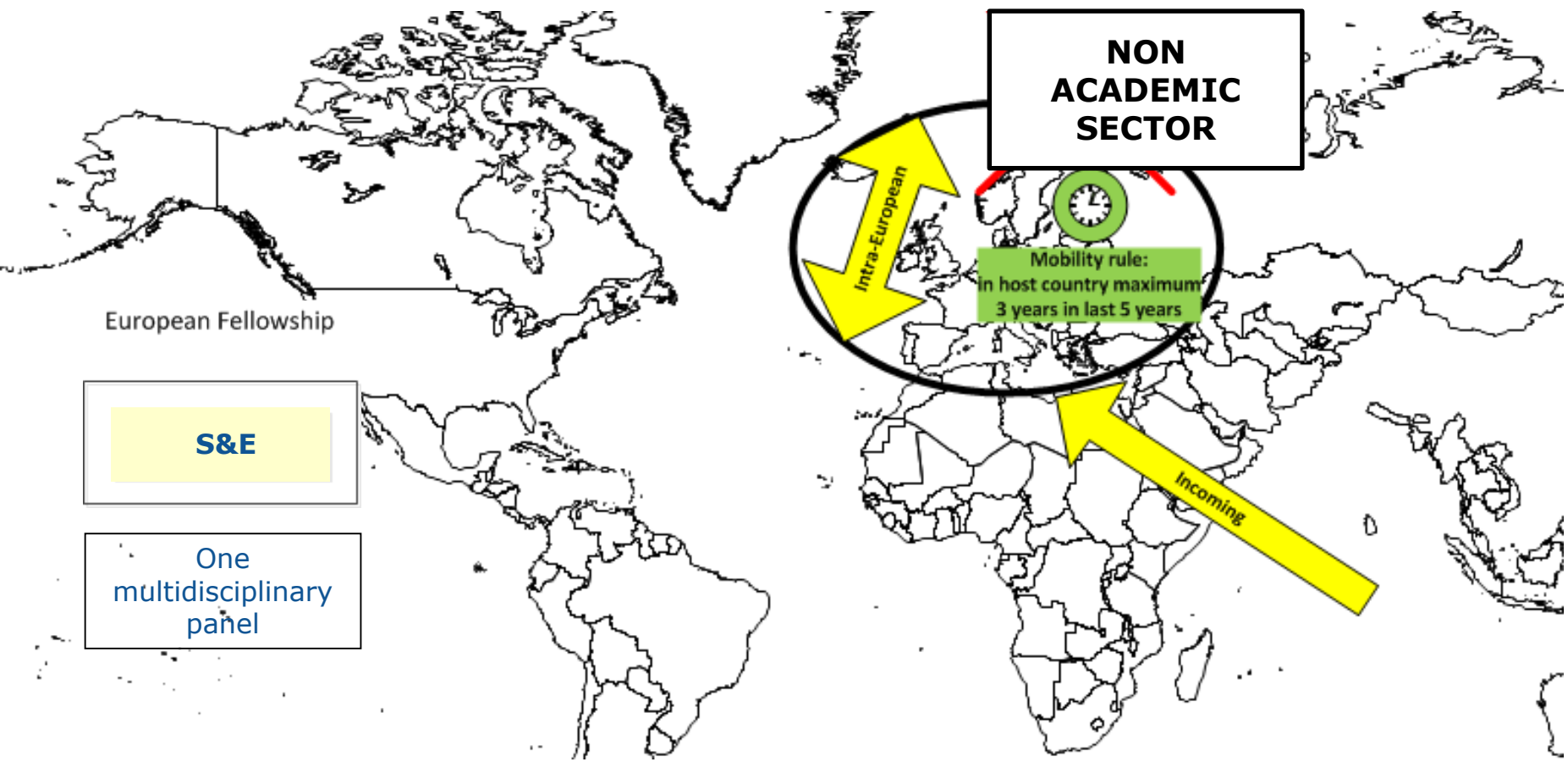
# EF – RI Reintegration Panel



# EF – S&E Society and Enterprise Panel



**NEW!**



- ✓ Beneficiary only **from non-academic sector (see previous definition):**
  - from industry to business (including SMEs),
  - government,
  - civil society organisations (NGOs, trusts, foundations, etc.),
  - some cultural institutions, museums,
  - hospitals,
  - international organisations (like the UN or WHO), etc.
- ✓ **Mobility rule** = not more than 3 years in the last 5 years in the country of the beneficiary
- ✓ Earmarked budget of **10 million €**

# Global Fellowships (GF)



**For fellows from Europe  
going to Third countries (12-24 months)  
and returning to Europe (12 months)**  **TOT. = 24/36 months**

One experienced researcher applies with one host institution for a research project that can last between 24 and 36 months (12-24 months initial outgoing phase in a Third Country + 12 months of mandatory return phase to MS/AC)

## Host Institution (future Beneficiary)

***Same as in EF!***

- Location: MS or AC
- Sector: Academic or Non-academic
- International European Interest Organisation (IEIO)
- International Organisation (*exceptional cases*)

Appoints the Supervisor

Recruits the experienced researcher (contract of employment)



### **Partner Organisation**

- **Location: Third Country (not MS or AC)**
- **Sector: Academic or Non-academic**
- **International Organisation**
- **Nominates a Supervisor for the researcher**
- **Provides a signed Letter of Commitment\* (in the proposal)**
- **DOES NOT sign the Grant Agreement**
- **DOES NOT recruit the researcher**
- **DOES NOT directly claim costs from the action**

# LETTER OF COMMITMENT from Partner Organisations



**!!!!!!! Document needed only for Global Fellowships !!!!!!!**

- no specific template;
- heading or stamp from the institution;
- up-to-date (i.e. issued after the call publication, 12 April 2016);
- the text must demonstrate the will to actively participate in the proposed action and the precise role;
- signed by the legal representative.

## Researcher (future Fellow)

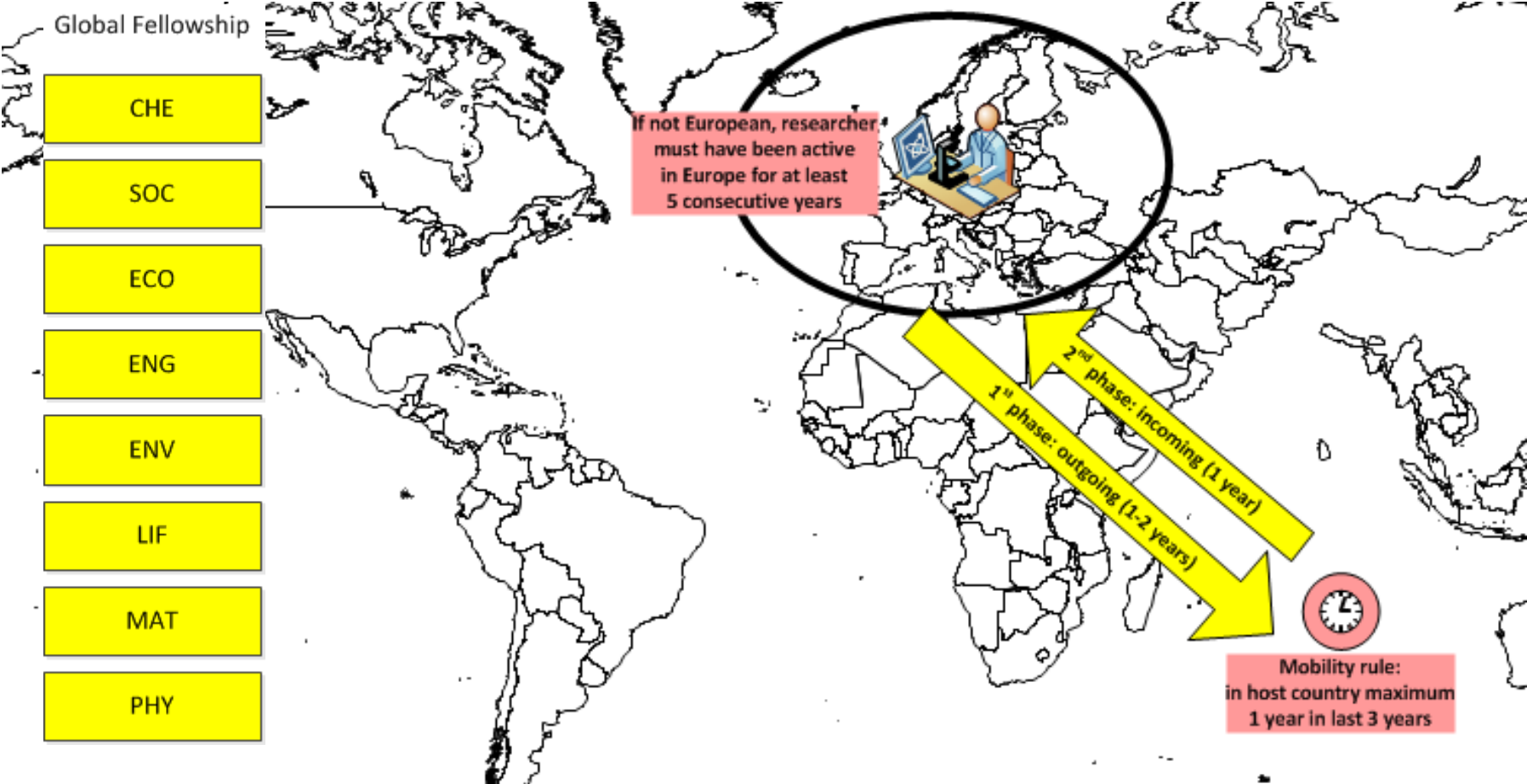
- **Mobility:** from ANY country to the partner organisation in the Third Country
- **Mobility rule:** not more than 3 years in the last 5 years in the Third Country of the partner organisation
- **Nationality:**
  - national of MS/AC or
  - long-term resident of a MS/AC
- **under the direct supervision of two Supervisors.**

### Duration

Phase GF	Duration (months)
1. Outgoing to TC	12 - 24
2. Return to MS or AC	<b>12</b> (mandatory)
<b>TOTAL</b>	<b>24 - 36</b>



# GF - Global Fellowships



# IF 2016 - Overview



INDIVIDUAL FELLOWSHIPS		EUROPEAN				GLOBAL
		Standard EF	CAR	RI	SE	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	ANY	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC to MS or AC	From ANY country to MS or AC	From ANY country to TC then to MS/AC
		< 12 months in the last 3 years	< 36 months in the last 5 years	< 36 months in the last 5 years	< 36 months in the last 5 years	< 12 months in the last 3 years
	Career break in research	-	≥ 12 mm before 14/09/16	-	-	-
PARTICIPANTS	Beneficiary	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Partner Organisation	MS or AC (optional secondments)	MS or AC (optional secondments)	MS or AC (optional secondments)	MS or AC (optional secondments)	TC (outgoing phase)
						MS or AC (optional secondments)
DURATION (months)		12 / 24	12 / 24	12 / 24	12 / 24	24 / 36 (12 / 24 + 12)
SCIENTIFIC PANELS/AREAS		8 panels	8 areas	8 areas	8 areas	8 panels
NUMBER OF RANKING LISTS		8	1	1	1	8
BUDGET (total € 218.5 million)		€ 179.5 million			€10 million	€ 29 million

Multidisciplinary panels



European  
Commission



# **Evaluation Criteria and IF proposals**

Research  
Executive  
Agency

# IF – Award criteria



Excellence	Impact	Quality and Efficiency of Implementation
<b>Quality and credibility of the research / innovation project;</b> level of novelty, appropriate consideration of inter- /multidisciplinary and <i>gender aspects</i>	<b>Enhancing the potential and future career prospects of the researcher</b>	Coherence and effectiveness of the <b><i>work plan</i></b>
<b>Quality and appropriateness of the training</b> and of the two way <b>transfer of knowledge</b> between the researcher and the host	Quality of the proposed measures to <i>exploit and disseminate</i> the project results	Appropriateness of the allocation of <b><i>tasks and resources</i></b>
<b>Quality of the supervision</b> and of the integration in the team/institution	Quality of the proposed measures to <b><i>communicate</i></b> the project activities to different target audiences	Appropriateness of the <b>management structure and procedures</b> , including risk management
<b>Capacity of the researcher</b> to reach or re-enforce a position of professional maturity/independence		Appropriateness of the <b><i>institutional environment</i></b> (infrastructure)

**Each criterion will be scored out of 5. Decimal points may be given.**

# IF – Award criteria



Excellence	Impact	Quality and Efficiency of Implementation
Weighting		
50%	30%	20%
Priority in Case of Ex Aequo		
1	2	3

The total score is weighted, the maximum is 100.

An overall threshold of 70% will be applied to the total weighted score.

- **Further Prioritization**

- if necessary based on other appropriate characteristics that are
  - \* decided by the panel
  - \* related to the contribution of the proposal to the European Research Area and/or general objectives mentioned in the Work Programme
- depends on available budget and call conditions



**Proposals: submitted exclusively electronically, using the Participant Portal.**

### **Part A: administrative details**

#### **Section 1 – General Information**

#### **Section 2 – Administrative data of participating organisations (supervisor(s), researcher)**

#### **Section 3 – Budget: information on the duration (person-months) to calculate the total requested EU contribution.**

#### **Section 4 – Ethics: identifies any ethical aspects of the proposed work. Even if there are no issues, you must simply confirm that none of the ethical issues apply to the proposal**

#### **Section 5 – Call specific questions request declarations related to eligibility and personal data, together with questions on any secondment in Europe**

## The "core" proposal

The structure below is mandatory

### **DOCUMENT 1 (13-PAGE LIMIT APPLIED)**

**START PAGE (1 page)**

**LIST OF PARTICIPATING ORGANISATIONS**

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

- |    |                |                     |
|----|----------------|---------------------|
| 1. | EXCELLENCE     |                     |
| 2. | IMPACT         | <b>MAX 10 pages</b> |
| 3. | IMPLEMENTATION |                     |

**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. | <b>ETHICAL ASPECTS</b>   |
| 7. | LETTERS OF COMMITMENT OF PARTNER ORGANISATIONS ( <b><u>only for GF</u></b> ) |

# IF – Part B

## Part B submitted as two separate documents:

### - Document 1: Max. total length = 13 pages

1 for Start Page,

1 for Table of Contents,

1 for List of Participating Organisations, and

10 for sections 1 to 3: section 1 must start on p. 4)

*Excess pages will be watermarked*

### - Document 2: sections 4-7 of Part B.

No overall page limit to document 2, but applicants should respect the instructions per section (e.g. in section 4, maximum 5 pages).

Applicants will not be able to submit proposals unless both docs. 1 & 2 are provided.





## 1. EXCELLENCE

Credibility; State-of-the-art; Objectives; Research methodology and approach ; Originality and innovative aspects; Two way transfer of knowledge; Qualifications and experience of the supervisor;  
The most talented researchers (ideas, track record)

## 2. IMPACT

Explain impact on researchers career development;  
Concrete work plan;  
Quality of the proposed measures to  
- exploit and disseminate the project results  
- communicate the project activities to different audiences

## 3. IMPLEMENTATION

Realistic; Work packages, milestones, deliverables;  
Gantt chart; Management, monitoring, commitment  
contingency plan; Data management plan



## CV of the Experienced Researcher

Max. 5 pages including the standard academic and research record.

Any research career gaps and/or unconventional paths should be clearly explained so that this can be fairly assessed by the independent evaluators.

The *Experienced Researchers* must provide a list of achievements reflecting their track, and this may include, if applicable:

- 1. Publications in major international peer-reviewed multi-disciplinary scientific journals and/or in the leading international peer-reviewed journals, peer-reviewed conference proceedings and/or monographs of their respective research fields, indicating also the number of citations (excluding self-citations) they have attracted.**
- 2. Granted patent(s).**
- 3. Research monographs, chapters in collective volumes and any translations thereof.**
- 4. Invited presentations to peer-reviewed, internationally established conferences and/or international advanced schools.**
- 5. Research expeditions that the *Experienced Researcher* has led.**
- 6. Organisation of International conferences in the field of the applicant (membership in the steering and/or programme committee).**
- 7. Examples of leadership in industrial innovation.**
- 8. Prizes and Awards.**
- 9. Funding received so far.**
- 10. Supervising, mentoring... activities.**



# Descriptors (keywords)

Scientific area & descriptors chosen by applicants guides REA to select experts and allocate proposals to them.

Number of descriptors chosen by applicants: from 3 to 5.

Applicants select the descriptors **in order of importance**: 1st = the most important

Annex 6 of the GfA: Breakdown of scientific areas into a number of descriptors.

Applicants must:

- 1) Select one of the 5 types of fellowship (EF-ST, EF-CAR, EF-RI, EF-SE, GF)
- 2) Select the area of research (e.g.: CHE), i.e. the core discipline of the proposal
- 3) Within the most relevant sub-area of research (e.g.: C1-Synthetic Chemistry and Materials), select the **first descriptor** that best characterises the subject of the proposal
- 4) Select the **second descriptor** within the same area of research (e.g.: CHE)
- 5) **Third descriptor**: from **any of the eight (8) areas of research** is mandatory.
- 6) If needed applicants **may add further two (2) additional descriptors** chosen freely.



- ❖ **Don't wait** until final clean version is ready
- ❖ **Submit** your proposal **regularly**
- ❖ Every new submission **overwrites the previous**

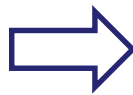
# Who can help you?



# NCP – National Contact Point



Your country



MSCA



# H2020 manual

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## RESEARCH & INNOVATION

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## H2020 Online Manual

The H2020 Online Manual offers:

- an overview of all steps you need to know for the electronic management of proposals or grants;
- easy navigation by process steps;
- a brief descriptions on how to complete your tasks.

Links and references to:

- Guidance notes, templates
- User manuals of the relevant tools
- Frequently asked questions

[H2020 ONLINE MANUAL](#)

*Thank you for your attention  
and  
good luck!*

