

1 Excellence

1

1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects

Provide an introduction, discuss the state-of-the-art, specific objectives and give an overview of the action.

Discuss the research methodology and approach, highlighting the type of research / innovation activities proposed.

Explain the originality and innovative aspects of the planned research as well as the contribution that the action is expected to make to advancements within the research field. Describe any novel concepts, approaches or methods that will be implemented.

Discuss the interdisciplinary aspects of the action (if relevant).

Discuss the gender dimension in the research content (if relevant). In research activities where human beings are involved as subjects or end-users, gender differences may exist. In these cases the gender dimension in the research content has to be addressed as an integral part of the proposal to ensure the highest level of scientific quality.

1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host

Outline how a two way transfer of knowledge will occur between the researcher and the host institution(s):

- Explain how the experienced researcher will gain new knowledge during the fellowship at the hosting organisation(s).
- Outline the previously acquired knowledge and skills that the researcher will transfer to the host organisation(s).

For **Global Fellowships** explain how the newly acquired skills and knowledge in the Third Country will be transferred back to the host institution in Europe (the beneficiary) during the incoming phase.

Describe the training that will be offered. Typical **training activities** in Individual Fellowships may include:

- Primarily, training-through-research by the means of an individual personalised project, under the guidance of the supervisor and other members of the research staff of the host organisation(s).
- Hands-on training activities for developing scientific skills (new techniques, instruments, research integrity, 'big data'/'open science') and transferable skills (entrepreneurship, proposal preparation to request funding, patent applications, management of IPR, project management, task coordination, supervising and monitoring, take up and exploitation of research results)
- Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments)
- Participation in the research and financial management of the action
- Organisation of scientific/training/dissemination events
- Communication, outreach activities and horizontal skills
- Training dedicated to gender issues

¹Literature should be listed in footnotes, font size 8 or 9. All literature references will count towards the page limit.

1.3 Quality of the supervision and of the integration in the team/institution

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 (PhD, postdoctoral researchers). Information provided should include participation in projects, publications, patents and any other relevant results.

Describe the hosting arrangements.² The application must show that the experienced researcher will be well-integrated within the team/institution so that all parties gain maximum knowledge and skills from the fellowship. The nature and the quality of the research group/environment as a whole should be outlined, together with the measures taken to integrate the researcher in the different areas of expertise, disciplines, and international networking opportunities that the host could offer.

For **Global Fellowships** both phases should be described - for the outgoing phase, specify the practical arrangements in place to host a researcher coming from another country, and for the incoming phase specify the measures planned for the successful (re)integration of the researcher.

1.4 Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship

Researchers should **demonstrate** how their existing professional experience, talents and the proposed research will contribute to their development as independent/mature researchers, **during the fellowship**. Explain the new competences and skills that will be acquired and how they relate to the researcher's existing professional experience.

Please keep in mind that the fellowships will be awarded to the most talented researchers as shown by the proposed research and their track record (Curriculum Vitae, section 4), in relation to their level of experience.

2 Impact

2.1 Enhancing the future career prospects of the researcher after the fellowship

Explain the expected impact of the planned research and training (i.e. the added value of the fellowship) on the future career prospects of the experienced researcher after the fellowship. Focus on how the new competences and skills (as explained in 1.4) can make the researcher more successful in their long-term career.

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

Describe how the new knowledge generated by the action will be disseminated and exploited, and what the potential impact is expected to be. Discuss the strategy for targeting peers (scientific, industry and other actors, professional organisations, policy makers, etc.) and to the wider community. Also describe potential commercialisation, if applicable, and how intellectual property rights will be dealt with, where relevant.

For more details refer to the [“Dissemination & exploitation” section of the H2020 Online Manual](#)

Describe how the new knowledge generated by the action will be disseminated and exploited, e.g. communicated, transferred into other research settings or, if appropriate, commercialised. Describe, when relevant, how intellectual property rights will be dealt with, where relevant.

Concrete planning for section 2.2 must be included in the Gantt Chart (see point 3.1).

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

Demonstrate how the planned public engagement activities contribute to creating awareness of the performed research. Demonstrate how both the research and results will be made known to the public in such a way they can be understood by non-specialists.

The type of outreach activities could range from an Internet presence, press articles and participating in European Researchers' Night events to presenting science, research and innovation activities to students from primary and secondary schools or universities in order to develop their interest in research careers. For more details, see the guide on [Communicating EU research and innovation guidance for project participants](#) as well as the [“communication” section of the H2020 Online Manual](#). The frequency and nature of communication activities should be outlined in the

²The hosting arrangements refer to the integration of the researcher to his new environment in the premises of the host. It does not refer to the infrastructure of the host as described in the Quality and efficiency of the implementation criterion.

proposal. Concrete plans for the above must be included as a deliverable.

Concrete planning for communication activities must be included in the Gantt chart.

3 Quality and Efficiency of the Implementation

3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

Describe how the work planning and the resources mobilised will ensure that the research and training objectives will be reached. Explain why the number of person- months planned and requested for the project is appropriate in relation to the proposed activities.

Additionally, a Gantt chart should be included in the text listing the following:

- Work Packages titles (there should be at least 1 WP);
- List of major deliverables, if applicable;
- List of major milestones, if applicable;
- Secondments, if applicable.

The schedule should be in terms of number of months elapsed from the start of the action.

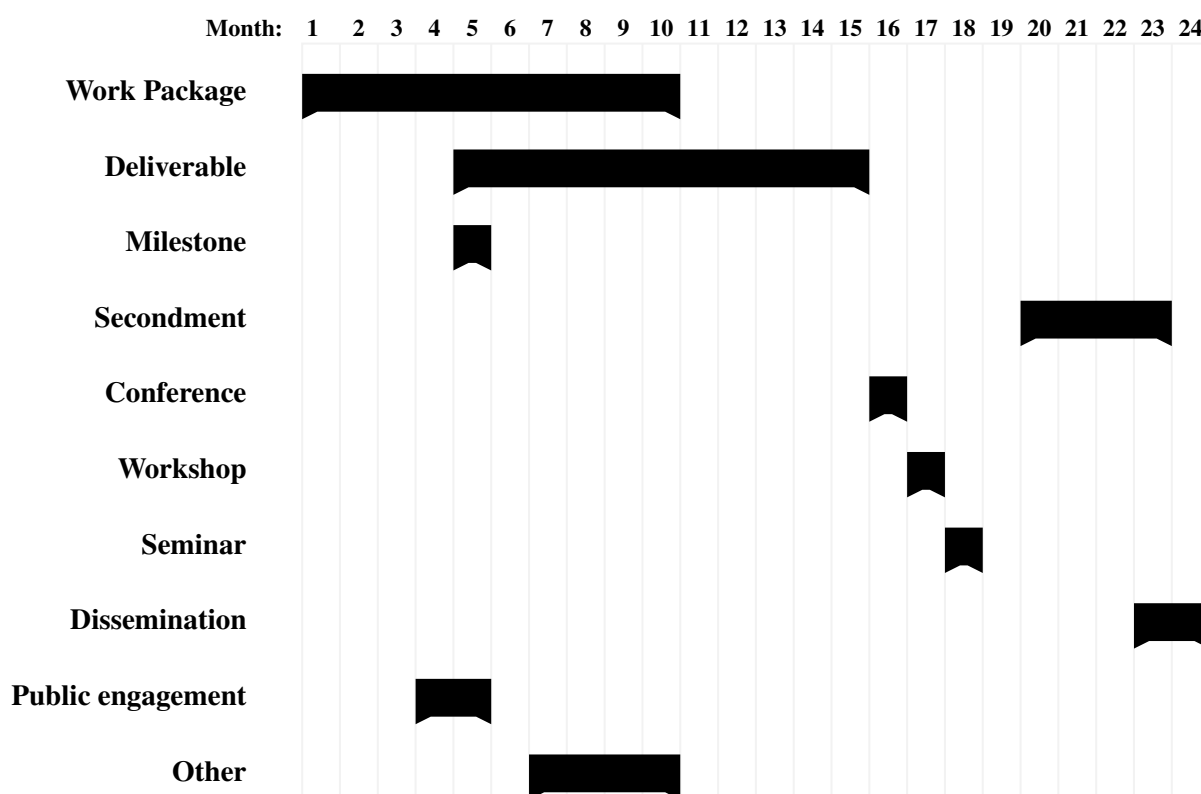


Figure 1: Example Gantt Chart

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

Describe the organisation and management structure, as well as the progress monitoring mechanisms put in place, to ensure that objectives are reached. Discuss the research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur.

If applicable, discuss any involvement of an entity with a capital or legal link to the beneficiary (in particular, the name of the entity, type of link with the beneficiary and tasks to be carried out).

If needed, please indicate here information on the support services provided by the host institution (European offices, HR services...).

3.3 Appropriateness of the institutional environment (infrastructure)

The active contribution of the beneficiary to the research and training activities should be described. For Global Fellowships the role of partner organisations in Third Countries for the outgoing phase should also appear.

Give a description of the main tasks and commitments of the beneficiary and all partner organisations (if applicable).

Describe the infrastructure, logistics, facilities offered insofar as they are necessary for the good implementation of the action.

STOP PAGE COUNT – MAX 10 PAGES

4 CV of the Experienced Researcher

The CV is intrinsic to the evaluation of the whole proposal and is assessed throughout the three evaluation criteria by the expert evaluators. Ensure that the information provided in Parts A and B is fully consistent. Always mention full dates (dd/mm/yyyy) in your CV.

The CV should be limited to a maximum of 5 pages and should include **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.

At a minimum, the CV should contain:

1. the **name** of the researcher
2. **professional experience** (in chronological order, using **exact** dates)
3. **education** (in chronological order, using **exact** dates)

The CV should also include information on:

1. **Publications** in 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** led by the experienced researcher.
6. **Organisation of International conferences** in the field of the researcher, including membership in the steering and/or programme committee.
7. Examples of **participation in industrial innovation**.
8. **Prizes and Awards**.
9. **Funding** received so far.
10. **Supervising and mentoring** activities.

In addition, researchers without a doctorate at the call deadline should clearly detail any period of full-time equivalent research experience in the CV (Part B, section 4). It is essential that the CV clearly explains how the research experience is calculated, following the template below.³

³More entries can be added if needed. This table is beyond the 5-page limit.

Academic Qualifications counting towards the Total Full time postgraduate research experience			
University Degree giving access to PhD:	Institution name and country	Date of award (a)	
	Uni	date	
Other university degree(s)/master(s), if any, obtained after the award of the university degree giving access to PhD:	Institution name and country	From	To
	uni	from	to
	Full time research experience	Proportion of research activities as a percentage of the duration of the Master	Duration of research activities expressed in months
		xx%	(b) ⁴ = xx% * duration of Master
	uni	from	to
	Full time research experience	Proportion of research activities as a percentage of the duration of the Master	Duration of research activities expressed in months
xx%		(b) ⁵ = xx% * duration of Master	
Doctorate:	Institution name and country	From	To (Date Expected)
	uni	from	to
	Full time research experience		Duration of research activities expressed in months
			(c)
Other research activities counting towards the total full-time postgraduate research experience			
Institution:	Institution name and country	From	To (Date Expected)
	uni	from	to
	Full time research experience		Duration of research activities expressed in months
			(d)
Total full-time postgraduate research experience: number of months			=(b)+(c)+(d)

5 Capacity of the Participating Organisations

List of participating organisations (one page)

Please provide a list of all participating organisations (both beneficiaries and, where applicable, the entity with a capital or legal link to the beneficiary and the partner organisation⁶) indicating the legal name, the department carrying out the work and the supervisor.

If a secondment in Europe is planned but the partner organisation is not yet known, as a minimum the type of organisation foreseen (academic/non-academic) must be stated.

Any inter-relationship between different participating organisation(s) or individuals and other entities/persons (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, etc.) **must** be declared and justified **in this part of the proposal**.

⁶All partner organisations should be listed here, including secondments

Participants	Legal Entity Short Name	Country	Supervisor	Role of Partner Organisation ⁷
Beneficiary				
- NAME				
Entity with a capital or legal link				
- NAME				
Partner Organisation				
- NAME				

Complete the following table. 1 page for each role—choose one of:

- beneficiary (compulsory)
- entity with a capital or legal link to the beneficiary (optional)
- partner organisation for GD (compulsory for GF only)
- partner organisation for secondment (optional)

[Full name + Legal Entity Short Name + Country]	
General Description	
Academic organisation	Yes / No
Role and profile of key persons (supervisor)	(names, title, qualifications of the main supervisor)
Dept./Division/Laboratory	
Key research facilities, Infrastructure and Equipment	Demonstrate that the beneficiary has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to the recruited experienced researcher. If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and its role in the action in the following table.
Independent research premises?	Please explain the status of the beneficiary's research facilities—i.e. are they owned by the beneficiary or rented by it? Are its research premises wholly independent from other entities? If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and describe the nature of the link..
Previous and current involvement in research	Indicate up to 5 relevant EU national or international research and training actions/projects in which the beneficiary has previously participated
Current involvement in Research and Training Programmes	
Relevant publications and/or research/innovation products	(Max 5) Only list items (co-)produced by the supervisor

6 Ethical Issues

Compliance with the relevant ethics provisions is essential from the beginning to the end of the action and is an integral part of research funded by the European Union within Horizon 2020.

Applicants submitting research proposals for funding within Marie Skłodowska-Curie actions in Horizon 2020 should demonstrate proactively that they are aware of and will comply with European and national legislation and fundamental ethical principles, including those reflected in the [Charter of Fundamental Rights of the European Union](#) and the [European Convention on Human Rights and its Supplementary Protocols](#).

⁷For example hosting secondments, for GF hosting the outgoing phase, etc.

Please be aware that it is the applicants' responsibility to identify any potential ethical issue, to handle the ethical aspects of the proposal and to detail how these aspects will be addressed.

The Ethics Review Procedure in Horizon 2020

All proposals above threshold and considered for funding will undergo an Ethics Review carried out by independent ethics experts. When submitted a proposal to Horizon 2020, all applicants are required to complete an Ethics Issues Table (EIT in the Part A of the proposal. Applicants who flag ethical issues in the EIT have to also complete a more in-depth Ethics Self-Assessment in Part B.

The ethics self-assessment will become part of the Grant Agreement and may thus lead to binding obligations. The Grant Agreement can only be signed if all ethics requirements have been duly addressed. The ethics review result will distinguish between ethics requirements to be addressed before Grant Agreement signature and those that can be cleared at a later stage (e.g. ethics approvals to be submitted before the start of the action task). In the latter case, a separate work package 'Ethics Requirements' listing the deliverables will be created automatically.

For more details, please refer to the H2020 ["How to complete your Ethics Self-Assessment" guide](#).

Ethics Self-Assessment (Part B)

The Ethics Self-Assessment must:

1. Describe how the proposal meets the EU and national legal and ethics requirements of the country/countries where the task raising ethical is to be carried out.

For more information on how to deal with Third Countries⁸ please see Article 34 of the [Annotated Model Grant Agreement](#), as well as the following [rules for the protection of personal data inside and outside the EU](#). Please ensure and confirm that the research performed outside the EU is compatible with the Union, National and International legislation and could have been legally conducted in one of the EU Member States.

Please list the documents provided with their expiry date.

Ensure early compliance of the proposed research with EU and national legislation on ethics in research. Should your proposal be selected for funding, you will be required - if applicable - to confirm that you have obtained the following documents needed for implementing the action tasks in question:

- any ethics committee opinion required under national law and
- any notification or authorisation for activities raising ethical issues required under national and/or European law

If you have not already applied for/received the ethics approval/required ethics documents when submitting the proposal, please indicate in this section the approximate date when you will obtain the missing approval/any other ethics documents. Please state explicitly that you will not proceed with any research with ethical implications before obtaining the necessary authorizations/opinions.

The documents must be kept on file and be submitted upon request by the beneficiary to the REA (see Article 52). If they are not in English, they must be submitted together with an English summary, which shows that the action tasks in question are covered and includes the conclusions of the committee or authority concerned (if available).

If you plan to request these ethics documents specifically for your proposed action, your request must contain an explicit reference to the action's title.

2. Explain in detail how you intend to address the ethical issues flagged, in particular with regard to:

⁸In the context of ethics appraisal, Third Country refers to non-EU country; Associated Countries are "ethics" TC

- the research **objectives** (e.g., study of vulnerable populations, cooperation with a Third Country, etc.);
- the research **methodology** (e.g., clinical trials, involvement of children and related information and consent/assent procedures, data protection and privacy issues related to data collected, etc.);
- the potential **impact** of the research (e.g. dual use issues, environmental damage, malevolent use, etc.).
- appropriate health and safety procedures — conforming to relevant local/national guidelines/legislation — for the staff involved
- possible harm to the environment the research might cause (e.g. environmental risks of nanomaterials), and measures that will be taken to mitigate the risks.

In order to facilitate the ethics review of the proposal, please confirm (delete as appropriate):
[... TO DO: ethics table from template ...]

7 Letters of commitment (GF only)

For the Global Fellowship proposals, a letter of commitment **of the partner organisations** (hosting the outgoing phase in a third country) must be included in Part B-2 to ensure their real and active participation. Do not attach this letter as a separate PDF file or as an embedded file since this makes them invisible in the proposal. GF Proposals which fail to include a *letter of commitment* of the partner organisation will be declared **inadmissible**.

Minimum requirements for the letter of commitment:

- heading or stamp from the institution;
- up-to-date (may not be dated prior to the call publication);
- the text must demonstrate the will to actively participate in the (identified) proposed action and the precise role.

Please note that no template for these letters is provided, only general rules.