

Checklist for the Application of a Marie Skłodowska-Curie Individual Fellowships (H2020-MSCA-IF-2014) -Global Fellowship-

✓ Correct Action

- ☐ Check that your proposed work falls within the scope of this call, and that you have applied for the correct action (see the Horizon 2020 Work Programme, 3. Marie Skłodowska-Curie Actions 2014-2015).
- ☐ Global Fellowships are composed of an outgoing phase during which the researcher undertakes a secondment to a partner organisation in a Third Country (TC), and a mandatory 12-month return period to a host organisation (the beneficiary) located in a Member State (MS) or Associated Country (AC).
- ☐ The *Experienced Researcher* should write in the proposal a concrete plan of training-through-research at the host organisation's premises. The action should aim to reach a realistic and well-defined objective in terms of career advancement (by attaining a leading independent position for example) or resuming a research career after a break. The action should be created with the final outcome to develop and significantly widen the competences of the *Experienced Researcher*, particularly in terms of multi/interdisciplinary expertise, inter-sectoral experience and transferable skills.
- ☐ Mobility is considered by the European Commission essential for the personal and career development of researchers. It allows the enhancement of collaboration, and the acquisition of new skills and knowledge which contribute to increased creativity, efficacy and performance, thereby contributing to career development and a successful, competitive knowledge-based society.

✓ Specific Objectives

- ☐ Enhancing the creative and innovative potential of Experienced Researchers who wish to diversify their individual competence in terms of skill acquisition through advanced training, international and inter-sectoral mobility.

✓ Thematic Area

- ☐ Research fields are chosen freely by the applicants (bottom-up approach). All domains of research and technological development addressed under the EU Treaty are eligible for funding (within the limits of the provisions on ethics of the H2020 legal base and except areas of research covered by the Euratom Treaty).
- ☐ All research activities supported by Horizon 2020 should respect fundamental ethical principles and legislation (see template Part B.)

✓ Duration

- ☐ Outgoing to TC: 12 - 24 months
Return to MS or AC: 12 months (mandatory)

✓ **Eligible Organisations**

- ☐ Two different types of organisations are eligible as either beneficiary or partner organisation and are distinguished according to their sector:
 - ☐ Academic sector consists of public or private higher education establishments awarding academic degrees, public or private non-profit research organisations whose primary mission is to pursue research, and International European interest organisations (e.g. CERN, EMBL)
 - ☐ Non-academic sector includes any socio-economic actor not included in the academic sector and fulfilling the requirements of the Horizon 2020 Rules for Participation. This could include private enterprises (including SMEs), non-profit or charitable organisations (e.g. NGOs, trusts, etc.), museums, hospitals, etc.
- ☐ Before applying, each organisation has to register and is automatically classified in one of the two sectors on the basis of the Participant Identification Code (PIC) assigned during the validation process. PIC of TU Wien: 99987888.

☐ **Participants**

Beneficiary:

- ☐ The beneficiary is the host organisation that recruits the *Experienced Researcher* and ensures through appointment of a supervisor the necessary training of the researcher.
- ☐ The beneficiary signs the Grant Agreement, receives funding, claims costs and takes complete responsibility for executing the proposal.

Partner organisations:

- ☐ Partner organisations must be situated in a TC and is the entity where the initial compulsory outgoing phase takes place.
- ☐ It can be from the academic or non-academic sector.
- ☐ The partner organisations do not recruit any researcher and do not sign the Grant Agreement. As such partner organisations cannot directly claim any costs from the action.
- ☐ Each partner organisation in a TC must include an up-to-date letter of commitment in Part B of the proposal to demonstrate their real and active participation in the proposed action; their precise role should also be clearly described in the proposal.

✓ **Minimum Country Participation**

- ☐ One beneficiary in a EU Member State (MS) or Associated Country (AC) and one partner organisation(s) in Third Country (TC); optional: partner organisations in MS or AC

✓ **Budget**

- ☐ Funding is calculated exclusively based on unit costs. One unit is defined as one person-month. The unit costs are divided into researcher unit costs (living allowance- adjusted through the application of a country correction coefficient of the host organisation; mobility allowance; optional family allowance) and institutional unit costs (research, training and networking costs; management and overhead costs)

✓ **Eligible Researchers** (at the deadline for the submission of proposal)

Research experience:

- ☐ The researcher must be an *Experienced researcher* (ER): S/he must, at the deadline for the submission of proposals, be in possession of a doctoral degree or have at least four years of *full-time equivalent research experience*.
- ☐ *Full-time equivalent research experience* is measured from the date when a researcher obtained the degree which would formally entitle him/her to embark on a doctorate, either in the country in which the degree was obtained or in the country in which the researcher is recruited, irrespective of whether or not a doctorate is or was ever envisaged.

Mobility rule:

- ☐ For a Global Fellowship researchers may apply for one of the 8 scientific panels, according to the topic of their research proposal. Applicants should carefully choose the panel and descriptors since this will guide the Research Executive Agency (REA) in the selection of experts for proposal evaluation.
- ☐ The *experienced researcher* may be a national or long-term resident of the MS or AC. Long-term residents are researchers who spent a period of full-time research activity of at least 5 consecutive (without breaks in research) years in one or more MSs or ACs.
- ☐ S/he must move or have moved (transnational mobility) from any country to the partner organisation located in the TC.
- ☐ S/he must not have resided or carried out the main activity (work, studies, etc.) in the TC where the initial outgoing phase takes place for more than 12 months in the 3 years immediately prior to the deadline for submission of proposals. Compulsory national service and/or short stays such as holidays are not taken into account.
- ☐ As far as international established in TC, this rule does not apply to the hosting of eligible researchers. However, the *experienced researcher* must not have spent more than 12 months in the 3 years immediately prior to the deadline for the submission of proposals at the same organisation.

✓ **Recruitment**

- ☐ An important aspect of the Commission's policy towards the researchers is to improve their working and living conditions and to promote mobility in order to open up new perspectives for research careers in Europe. The host organisations will therefore be required to meet certain conditions relating to the recruitment of researchers, which should be in line with the principles set out in the European Charter for Researchers & the Code of Conduct for the Recruitment of Researchers (http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf).

✓ **Secondments**

- ☐ The *experienced researcher* may be seconded to another institution in Europe. Such secondments must significantly contribute to the impact of the fellowship and therefore in certain research fields would be expected to take place in the non-academic sector. The Individual Fellowships promote the involvement of organisations from the non-academic sector. In all cases the involvement of the non-academic sector must be meaningful and appropriate to the implementation mode and research field.

- ☐ The organisation where the secondment takes place is a partner organisation and must be located in the Member States or Associated Countries.
- ☐ If the partner organisation where the secondment takes place is not identified at the proposal stage, it is essential that Part B of the proposal contains information on the sector to which this entity would belong, in addition to the timing and duration of the secondment and its overall purpose.
- ☐ The secondments must be clearly justified in the Part B of the proposal and their maximum duration is defined according to the total duration of the fellowship:
 - ☐ Duration of the fellowship: ≤ 18 months \rightarrow maximum duration of secondment: 3 months
 - ☐ Duration of the fellowship: ≥ 18 months \rightarrow maximum duration of secondment: 6 months
- ☐ The secondment phase can be a single period or divided into shorter mobility periods.
- ✓ Secondments that are not mentioned in Part B of the proposal and in the Grant Agreement will not be taken into account later and, thus, no costs can be claimed for such periods.
- ✓ **Typical Training Activities:**
 - ✓ Primarily, training-through-research under the direct supervision of the supervisor and other members of the scientific staff of the host organisation by the means of an individual personalised action.
 - ✓ Hands-on training activities for developing scientific (new techniques, instruments, etc) and transferable skills (entrepreneurship, proposal preparation to request funding, patent applications, management of IPR, ethics, action management, task coordination, supervising and monitoring, take up and exploitation of research results etc.)
 - ✓ Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments)
 - ✓ Taking part 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
- ✓ **Communication and Dissemination:**
 - ☐ In addition to publications and patents, communication of the MSCA-Actions should aim to demonstrate the ways in which research is contributing to a European „Innovation Union“ (http://ec.europa.eu/research/innovation-union/index_en.cfm), and account for public spending by providing tangible proof that the funded research adds value by
 - ☐ Showing how the creative and innovative potential of Experienced Researchers is better achieved through training, international and inter-sectoral mobility, which contributes also notably to competitiveness, in achieving research excellence, and where relevant, addressing societal challenges.
 - ☐ Showing how the outcomes are relevant to our everyday lives, by creating jobs, training skilled researchers, introducing novel technologies, or by making our lives more comfortable in other ways
 - ☐ Making better use of the results by promoting their take up by decision-makers to influence policy-making, and by industry and the scientific community to ensure follow-up.

✓ **Public Engagement:**

- ☐ The primary goal of public engagement activities is to create awareness among the general public of the research work performed and its implications for citizens and society.
- ☐ The type of outreach activities could range from 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.
- ☐ The frequency and nature of such activities should be outlined in the proposal.

✓ **Personal Career Development Plan:**

- ☐ The Career Development Plan must be produced by the *Experienced Reseracher* and the supervisor prior to the start of the fellowship.
- ☐ In addition to research objective, this plan comprises the researchers's training and career needs, including training on transferable skills, planning for publications and participation in conferences.
- ☐ This dedicated and high-level plan will act as a reference for the *Experienced Researcher* to monitor for her/himself the progress of work, training and publications, and to take corrective measures if deviations and delays are observed in order to attain the professional development targets.

✓ **Gender Issues**

- ☐ In line with the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers (http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf), all Marie Skłodowska-Curie Actions proposals are encouraged to take appropriate measures to facilitate mobility and counter-act gender-related barriers to it.
- ☐ Equal opportunities are to be ensured, both at the level of supported researchers and that of decision-making/supervision.
- ☐ 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.
- ☐ As training researchers on gender issues serves the policy objectives of Horizon 2020 and is necessary for the implementation of research and innovation actions, applicants are encouraged to include such activity in their proposals, as appropriate.

✓ **Part A**

- ☐ The beneficiary fills in the sections 1 (general information about the proposal), 2 (data on participants and contact), 3 (budget), 4 (ethics issue table) and 5 (information on partner organisations)
- ☐ PIC (Participant Identification Code) der TU Wien: 999979888

✓ **Part B**

- ☐ Applicants must structure their proposal according to the headings indicated in the Part B template.
- ☐ A letter of commitment of the partner organisations in TC must be included in B.8 to demonstrate their real and active participation.
- ☐ The maximum length of sections 1 - 4 is 10 pages. There is no page limit per section. Within the overall page limit, applicants are therefore free to decide on the number of pages dedicated to each section.
- ☐ All margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers)
- ☐ The chosen font type leads to clearly readable text (e.g. Arial or Times New Roman) with minimum allowed font size of 11 points.
- ☐ Literature references should be listed in footnotes, font size 8 or 9. However, regardless of the format used, all footnotes will count towards the page limit.
- ☐ Part B carries as a header to each page the proposal acronym and the implementation mode to which you are applying (i.e. GF). All pages should be numbered in a single series on the footer of the page. It is recommended that the numbering format "Part B - Page X of Y" is used.
- ☐ For Part B exclusively PDF is used, compatible with Adobe version 3 or higher, with embedded fonts.

✓ **Submission of the Proposal**

- ☐ The project proposals are submitted by the host organisation, which is represented by the supervisor, in liaison with the researcher. Only the supervisor (from the host organisation as future beneficiary) can submit the proposal. The *Experienced Researcher* (future fellow) and the supervisor must be two different people.

☐ **Evaluation Criteria**

<u>IF - Marie Skłodowska-Curie Individual Fellowships</u>		
Excellence Quality, innovative aspects and credibility of the research (including inter/multidisciplinary aspects)	Impact Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives	Implementation Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Clarity and quality of transfer of knowledge/training for the development of researcher in light of the research objectives Quality of the supervision and the hosting arrangements	Effectiveness of the proposed measures for communication and results dissemination	Appropriateness of the management structures and procedures, including quality management and risk management Appropriateness of the institutional environment (infrastructure)
Capacity of the researcher to reach or re-enforce a position of professional maturity in research		Competences, experience and complementarity of the participating organisations and institutional commitment
50%	30%	20%
Weighting		
1	2	3
Priority in case of ex aequo		
NB: An overall threshold of 70% will be applied to the total weighted score.		