Marie Skłodowska-Curie Actions
Individual Fellowships
Part B – Description of the Proposal

# INHALT

➢ Aufbau eines Antrags – Part B

➢ Do's & Don'ts

➢ Unterstützung und nützliche Links

Für jede Ausschreibung den aktuellen **Guide for Applicants** (GfA) anwenden → Sicherstellen dass man den Richtigen verwendet!

Aktueller GfA: H2020-MSCA-IF-2014
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Download vom **Participants Portal (PP)**
http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/calls/h2020-msca-if-2014.html#tab2

➢ Teil A: Administrative Formulare → Mehr Information dazu morgen
➢ **Teil B: Beschreibung des Projekts → Teil des Vertrages**

➢ Genaue Angaben im GfA Annex 4, S.33 ff.

➢ Nach Registrierung: **Template** von PP downloaden!!!

➢ Seitenanzahl und Schriftsatz:

- **Max. 10 Seiten** für Kapitel **B.1-B.4** einhalten!!!

- Schriftgröße: **min. 11 points** (gut lesbar, z.B. Arial oder Times New Roman)

- Ränder 1,5 cm

➢ **Referenzen**: in der Fußnote, Größe 8 oder 9

➢ Kopf und Fußzeile auf jeder Seite:

- Kopfzeile: **Akronym** und **Submaßnahme** (Standard EF, CAR, RI, GF)

- Fußzeile: Seitenanzahl „**Part B- Page X of Y**"

List of Participants

B.1 Summary

B.2 Excellence

B.3 Impact

*max. 10 pages*

B.4 Implementation

Gantt Chart

B.5 CV of the Experienced Researcher *max. 5 pages*

B.6 Capacities of the Participating Organisations

B.7 Ethical Aspects

B.7 Letters of Commitment of Partner Organisations

# PART B – LIST OF PARTICIPANTS

| Participants | Legal Entity Short Name | Academic (tick) | Non-academic (tick) | Country | Dept./ Division / Laboratory | Supervisor | Role of Partner Organisation [1] |
|---|---|---|---|---|---|---|---|
| **Beneficiary** | | | | | | | |
| **NAME** | | | | | | | |
| **Partner Organisation** | | | | | | | |
| **NAME** | | | | | | | |

Evtl. **Abhängigkeiten unter den TeilnehmerInnen** (z.B. Familienbande, gemeinsame Räumlichkeiten oder Anlagen, gemeinsamer Besitz, finanzielle Interessen, gemeinsames Personal/Leitung usw.) müssen in diesem Teil des Antrags **erklärt und begründet** werden.

[1] *For example, hosting secondments, for GF hosting the outgoing phase etc.*

| Name | Location of research premises (city / country) | Type of R&D activities | No. of full - time employees | No. of employees in R&D | Web site | Annual turnover (approx. in Euro) | Enterprise status (Yes/No) | SME status [2] (Yes/No) |
|---|---|---|---|---|---|---|---|---|
|  |  |  |  |  |  |  |  |  |

➢ Die Information über **nicht-akademische „beneficiaries"** muss auf **aktuellen Daten** basieren, nicht auf Prognosen.

➢ Angaben bzgl. der **Kapazität** der teilnehmenden Organisationen werden in der Verhandlungsphase **überprüft**.

[2] *As defined in* *Commission Recommendation 2003/361/EC*

# PART B.1 – SUMMARY

➢ Kurze **Zusammenfassung** des Projekts

➢ Der Text kann/darf der gleiche sein wie im "**abstract**" (Part A)

Die Prinzipien des ***"European Charter for Researchers and Code of Conduct for the Recruitment of Researchers"*** ***(Charter&Code)***, die eine offene, transparente **Rekrutierung** sowie attraktive **Arbeitsbedingungen** befürworten, sollten von allen TeilnehmerInnen der Marie Skłodowska-Curie Actions **unterstützt und umgesetzt** werden.

http://ec.europa.eu/euraxess/index.cfm/rights/whatIsAResearcher

http://ec.europa.eu/euraxess/pdf/brochure_rights/am509774CEE_EN_E4.pdf

**2.1 Quality, innovative aspects and credibility of the research,** including inter/multidisciplinary aspects

➢ Introduction, state-of-the-art, objectives and overview of the action

➢ Research methodology and approach
- highlight type of research and innovation activities

➢ Originality and innovative aspects of the research programme
- contribution to **advancements** within the field
- any **novel concepts, approaches or methods**

→ Emphasise how the high-quality, novel research is the most likely to open up the best **career possibilities** for the ER and new **collaboration opportunities** for the host organisation(s).

**2.2 Clarity and quality of transfer of knowledge/training for the development of the researcher in light of the research objectives**

A two way **transfer of knowledge** should be described:

➢ Show **how the ER will gain new knowledge** from the hosting organisation(s) through training

➢ Outline the capacity for transferring the knowledge previously acquired by the researcher **to the host organisation(s)**. (If applicable)

**GF**: Explain how the **new acquired skills and knowledge** in the TC will be transferred **back to the host institution in Europe**

**2.3 Quality of the supervision and the hosting arrangements**

➢ <u>Qualifications and experience of the supervisor(s)</u>
Information regarding the supervisor(s):
- level of experience on the research topic
- track record of work
- main international collaborations
- participation in projects, publications, patents and any other relevant results

*Role and profile of the supervisor(s) should be listed in section 6.*

→ Show that the **ER will be well integrated** in order that all parties gain the maximum knowledge and skills from the fellowship

*ff*

**2.3 Quality of the supervision and the hosting arrangements**

➢ Qualifications and experience of the supervisor(s)
   **GF**:
   - Outgoing phase: **practical arrangements** made **to host a researcher** from another country
   - Return phase: measures for the **successful re-integration** of the researcher

European Charter for Researchers (p. 18):

### *Career development*

*Employers and/or funders of researchers should draw up, preferably within the framework of their human resources management, a specific **career development strategy for researchers** at all stages of their career, regardless of their contractual situation, including for researchers on fixed-term contracts. It should include the **availability of mentors** involved in providing support and guidance **for the personal and professional development of researchers**, thus motivating them and contributing to reducing any insecurity in their professional future. All researchers should be made familiar with such provisions and arrangements.*

**2.4 Capacity of the researcher to reach and re-enforce a position of professional maturity in research**

→ Please keep in mind that the **fellowships will be awarded to the most talented researchers** as shown by their **ideas** and their **track record**, where it is a fair indicator given their level of experience.

**3.1 Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives**

➢ Explain the <u>impact of the research and training</u> on the ER's career

→ The fellowship, including any secondments in Europe should **maximise the impact** on the researcher's activity **on European society**, including the **science base** and/or the **economy**, in a manner appropriate to the research field.

**3.2 Effectiveness of the proposed measures for communication and results dissemination**

➢ Communication and public engagement strategy of the action

➢ Dissemination of the research results

➢ Exploitation of results and intellectual property

→ **Concrete plans** must be included **in the Gantt Chart**. The **new knowledge** generated should be used wherever possible to
- enhance the **career** of the researcher
- advance **research** and foster **innovation**
- **promote** the research profession to the public

European Charter for Researchers (p. 13 and 14):

***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.*

European Charter for Researchers (p. 13 and 14):

***<u>Dissemination, exploitation of results</u>***

***All researchers should ensure***, *in compliance with their contractual arrangements,* ***that the results of their research are disseminated and exploited***, *e.g. communicated, transferred into other research settings or, if appropriate, commercialised. Senior researchers, in particular, are expected to take a lead in ensuring that research is fruitful and that results are either* ***exploited commercially or made accessible to the public*** *(or both) whenever the opportunity arises.*

**4.1 Overall coherence and effectiveness of the work plan**, including appropriateness of the allocation of tasks and resources

➢ Work Packages description

➢ List of major deliverables

➢ List of major milestones

➢ Secondments if applicable

➢ Gantt Chart

→ The schedule should be in terms of **number of months elapsed** from the start of the project

## Definitions

➢ **Work package (WP)**: a **major subdivision** of the proposed project

➢ **Deliverable**: a **distinct output** of the action (e.g. a report, a document, a technical diagram, a software, etc.)
  - ordered according to **delivery dates**
  - **numbering convention**:
    <WP number>.<number of deliverable within that WP>
    (e.g. deliverable 4.2 as second deliverable from WP 4)

➢ **Milestone**: **control point** in the action that help **to chart progress** (e.g. corresponding to the completion of a **key deliverable**, **intermediary points** where corrective measures can be taken, a **critical decision** point for further development)

## Example – Work Package Description (optional)

| Work Package Number | | Start Month – End Month |
|---|---|---|
| Work Package Title | (e.g. including Research, Training, Management, Communication and Dissemination…) | |
| Lead Beneficiary | | |
| **Description** (possibly broken down into tasks), lead partner and role of participants | | |
| **Deliverables** (brief description and month of delivery) | | |

# Example – Deliverables List (optional)

| Number [1] | Title | Nature [2] | Delivery Month [3] | Work Package No. | Description |
|:---:|:---:|:---:|:---:|:---:|:---:|
| 1.1 | | | | | |
| 1.2 | | | | | |
| 2.1… | | | | | |

[1] Deliverable numbers in order of delivery dates.
[2] Please indicate the nature of the deliverable using one of the following codes:
R=Report; **ADM**=Administrative (website completion, recruitment completion…); **PDE**=dissemination/exploitation;
**OTHER**=Other including coordination
[3] Measured in months from the project start date (month 1).

## Example – Milestones List (optional)

| Number | Title | Related Work Package(s) | Month [1] | Description [2] |
|--------|-------|------------------------|-----------|-----------------|
|        |       |                        |           |                 |
|        |       |                        |           |                 |
|        |       |                        |           |                 |

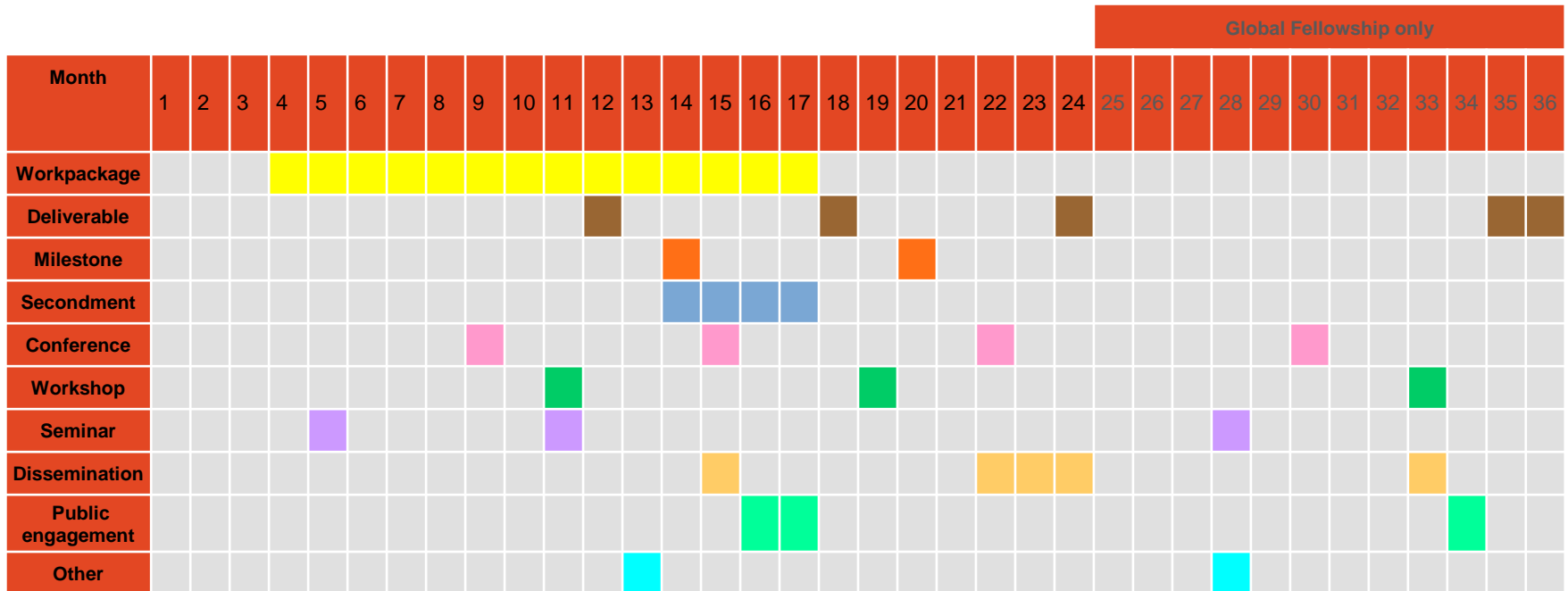[1] Measured in months from the project start date (month 1).
[2] Show how you will confirm that the milestone has been attained. Refer to indicators if appropriate. For example: a laboratory prototype completed and running flawlessly; software released and validated by a user group; field survey complete and data quality validated.

**4.2 Appropriateness of the management structure and procedures, including quality and risk management**

➢ Project organisation and management structure, including **financial management** and **progress monitoring** mechanisms

➢ Risks that might endanger reaching project objectives and the **contingency plans** to be put in place should risk occur

➢ **Could** be included in the **Gantt Chart**:
- Progress monitoring
- Risk management
- Intellectual Property Rights (IPR)

**Reflecting WP, secondments, training events and dissemination / public engagement activities**

| Month | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | | | | | | | | | | | | | | | | Global Fellowship only | | | | | | | | | | | | | | |
| Workpackage | | | | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | ▓ | | | | | | | | | | | | | | | | | | | |
| Deliverable | | | | | | | | | | | | ▓ | | | | | | ▓ | | | | | | ▓ | | | | | | | | | | | ▓ | ▓ |
| Milestone | | | | | | | | | | | | | | ▓ | | | | | | ▓ | | | | | | | | | | | | | | | | |
| Secondment | | | | | | | | | | | | | | ▓ | ▓ | ▓ | ▓ | | | | | | | | | | | | | | | | | | | |
| Conference | | | | | | | | | ▓ | | | | | ▓ | | | | | | | | ▓ | | | | | | | | ▓ | | | | | | |
| Workshop | | | | | | | | | | | ▓ | | | | | | | | ▓ | | | | | | | | | | | | | | ▓ | | | |
| Seminar | | | | | ▓ | | | | | | ▓ | | | | | | | | | | | | | | | | | ▓ | | | | | | | | |
| Dissemination | | | | | | | | | | | | | ▓ | | | | | | | | | ▓ | ▓ | ▓ | | | | | | | | | ▓ | | | |
| Public engagement | | | | | | | | | | | | | | ▓ | ▓ | | | | | | | | | | | | | | | | | | ▓ | | | |
| Other | | | | | | | | | | | | ▓ | | | | | | | | | | | | | | | | ▓ | | | | | | | | |

**Delete rows and columns that do not apply**

## 4.3  Appropriateness of the institutional environment (infrastructure)

➢ <u>Give a description of the legal entity/ies and its main tasks</u> (per participant)

→ Explain why the fellowship has the maximum chance of a successful outcome

*NB:* **Each participant** *is described in* **Section 6**. *This specific information should* **not be repeated** *here*

**4.4 Competences, experience and complementarity** of the participating organisations **and institutional commitment**

→ Describe how the fellowship will be **beneficial for both the ER and host** organisation(s)

➢ Commitment of beneficiary and partner organisations to the programme (for partner organisations, see also section 6 and 8)

**GF**: Describe the **role of partner organisations in Third Countries** and their **active contribution** to the research and training activities. A letter of commitment shall be provided in Section 8.
*(Fehler im GfA)*

## CV of the Experienced Researcher

➤ **Max. 5 pages**

➤ 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 evaluators**

ER must provide a **list of achievements** reflecting their track, this <u>may</u> include, <u>if applicable</u>:

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 ER has led

6. **Organisation of International conferences** in the field (membership in the steering and/or programme committee)

7. Examples of **leadership in industrial innovation**

8. **Prizes and Awards**

| Beneficiary X / Partner Organisation Y | |
|---|---|
| **General Description** | |
| **Beneficiaries: Role and Commitment of key persons (supervisor) Partner: Key Persons and Expertise (supervisor)** | *(Including names, title, qualifications of the supervisor)* |
| **Key Research Facilities, Infrastructure and Equipment** | *(Demonstrate that the team has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to recruited Experienced Researcher)* |
| **Only beneficiaries: Independent research premises?** | |
| **Previous involvement in Research and Training Programmes** | |
| **Current involvement in Research and Training Programmes** | *(Detail the EU and/or national research and training actions in which the partner is currently participating)* |
| **Relevant Publications and/or research/innovation products** | *(Max 5 for beneficiaries. Max 3 for partner organisations)* |

Min font size: 9
Beneficiary: max. one page
Partner organisation: max. half a page
The experts will be instructed to disregard content above this limit

## Ethics Issues

Applicants should demonstrate that they are aware of and will **comply with European and national legislation and fundamental ethics principles**, including those reflected in the

- **Charter of Fundamental Rights of the European Union**
  http://www.europarl.europa.eu/charter/pdf/text_en.pdf
- **European Convention on Human Rights**
  http://human-rights-convention.org/

and its Supplementary Protocols

Applicants should clearly identify and proactively **address ethics issues in their proposal**

**The Ethics Review Procedure in Horizon 2020**

**Applicants are required to complete an "Ethics Issues Table (EIT)"** in Part A**. Where **ethics issues are flagged in the EIT**, a more in depth **Ethics Self-Assessment** have to be completed in Part B.

All **proposals retained for funding** will be submitted to the **Ethics Review procedure**. A careful analysis and description of any potential ethics issues in a given proposal and **a detailed self-assessment** will help all actors involved to **undergo the Ethics Review in an efficient manner** without unnecessary delays.

**Ethics Issues Table (EIT) in Part A**

If any ethical issue/s are entered in the **Ethical Issues Table in Part A**, an **Ethics Self-Assessment** must be included **in Part B**.

More information is provided on the **Ethics- section** on the Research **Participant Portal** which comprises
- the Ethics Self-Assessment Guidelines
- an Ethics-Issues-Table Checklist

http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/ethics_en.htm

## 1) Describe how the proposal meets

- the **EU legislation** on Ethics
- **national legislation** and good practices on research ethics
- ethical **requirements of any TC** where research raising ethical issues are to be carried out. For more information on TC, see Article 34 of the Model Grant Agreement as well as
  http://ec.europa.eu/justice/data-protection/document/international-transfers/adequacy/index_en.htm

**If the proposal is selected for funding, following documents will be required:**

- the Ethics Committee/Authority opinion required under national law
- any other ethics-related documents mandatory under EU or national legislation
- if you didn't apply for/ receive required documents yet when submitting the proposal, indicate in the proposal the approximate date when you will provide the missing documents to the REA (scanned copy). State explicitly that you will not proceed to any research with ethical implications before the REA received these documents.

- *If these documents are not in English, an English summary of them must be submitted*
- *If these documents are requested specifically for the proposed project, the request must contain an explicit reference to its title*

## 2) Explain in detail how the issues flagged in the ethical issues table will be addressed, in particular with regard to

- Research **objectives** (e.g. study of vulnerable populations, dual use, etc.)
- Research **methodology** (e.g. clinical trials, involvement of children and related consent procedures, use of human tissues, protection of any data collected, etc.)
- The potential **impact** of the research (e.g. dual use issues, environmental damage, stigmatisation of particular social groups, political or financial retaliation, benefit-sharing, malevolent use, etc.).

For the **Global Fellowships** the **Partner organisations in third countries** must include a **letter of commitment** to demonstrate their **real and active participation**.

➢ **Evaluation experts will disregard** the contribution of any partner organisation without LoC

➢ The LoC should be **signed by the organisation's legal representative**, or of someone of equivalent authority

➢ The **scanned copies** of the LoC must be **included within the PDF file of part B** (not attached in a separate file or embedded)

✓ Aufbau eines Antrags – Part B

➢ Do's & Don'ts

➢ Unterstützung und nützliche Links

# DO'S & DON'TS – ALLGEMEIN

✓ Supervisor **rechtzeitig** kontaktieren!
✓ Alle wichtigen **Dokumente** lesen (WP, GFA)!
✓ Früh genug beginnen, um genug Zeit zu haben, alle Informationen zu sammeln
✓ Um **externes Feedback** bitten!
✓ Part B muss als **PDF-Dokument** (kompatibel mit Adobe Version 3 oder höher) eingereicht werden

✗ **Ziel** eines **IFs** nicht verstanden
✗ **Zu allgemein** geschrieben – nicht konkret/detailliert genug
✗ Antrag ist unklar, chaotisch
✗ Jeder B-Teil ist wichtig – es geht um **Zehntel-Punkte**!

✓ Die **Struktur des GfA** für Part B und max. Seitenanzahl unbedingt befolgen!!!

✓ Jedes Part B-Kapitel wenn möglich in weiteren Überschriften den Evaluierungskriterien folgend strukturieren

✓ Projekt Titel & Acronym sollen „catchy" und adäquat sein

✓ Der erste Eindruck zählt: überzeugendes & **gewinnendes Abstract**

✓ Klare Beschreibung der **Ziele und state-of-the-art**

✓ **Konsistenz** einhalten → Ziele müssen sich in den WPs, Deliverables und Milestones wiederfinden!

✓ Die Forschung muss **innovativ** sein und eine **Relevanz für Europa** haben

✓ Ein **detaillierter work plan** hilft ExpertInnen den Projektablauf zu verstehen

✓ **Grafiken, Tabellen und Fotos** statt viele Wörter (wenn möglich)

✗ **Zu viel Ehrgeiz**. Ambitionen sind gut, aber das Projekt muss realistisch und glaubwürdig bleiben

✗ Geplante Verbreitung und Verwertung der **Ergebnisse** sowie „outreach activities" sind nicht ausreichend beschrieben

✗ Ein schwaches **Projektmanagement** macht ExpertInnen unsicher

# DO'S & DON'TS – GASTORGANISATIONEN

✓ Klare Beschreibung der **Gastorganisation** / des **Supervisors** / der Gruppe
✓ **Track-record** der Gastorganisation und des Supervisors sind sehr wichtig
✓ **Erfahrung** des/der KoordinatorIn in Bezug auf Ausbildung und **Training** von erfahrenen Forschenden gut darstellen

✘ Gastinstitution / Supervisor / Arbeitsgruppe zu wenig ausführlich beschrieben (v.A. GF → outgoing + return host)!

✓ It is about you: ExpertInnen davon überzeugen, dass gerade SIE gefördert werden sollen!

✓ Die wissenschaftlichen (und andere) Kenntnisse beschreiben, die Sie sich im Rahmen des Fellowships aneignen werden

✓ ExpertInnen davon überzeugen, dass das **Fellowship** dazu beitragen wird, **den nächsten Karriereschritt** zu erreichen

✓ Einen wissenschaftlichen u. beruflichen Lebenslauf schreiben. Nicht-wissenschaftliche Aktivitäten gehören nicht zum CV…

✓ Ihr CV soll klar, begreiflich und anti-chronologisch aufgebaut sein

✗ **Auswirkung auf die Karriere-Entwicklung** und der Beitrag zur europäischen Exzellenz nur **mangelhaft** beschreiben

✗ Zu bescheiden sein

✗ CV nicht vollständig

- ✓ Aufbau eines Antrags – Part B

- ✓ Do's & Don'ts

- ➢ Unterstützung und nützliche Links

# UNTERSTÜTZUNG UND NÜTZLICHE LINKS

➢ Nationale Kontaktstellen (in Europa):

    http://ec.europa.eu/research/participants/portal/desktop/en/support/national_contact_points.html

➢ Regionale Kontaktstellen und Forschungsservices an der eigenen Organisation

➢ Marie Curie Fellows und Hosts an Ihrer Institution

➢ Horizon 2020 Helpdesk / Research Enquiry Service

    http://ec.europa.eu/research/index.cfm?pg=enquiries

➢ IT-Helpdesk

    http://ec.europa.eu/research/participants/api//contact/index.html

➢ European IPR Helpdesk:

    http://www.iprhelpdesk.eu

**Nützliche Websites:**

http://ec.europa.eu/research/mariecurieactions

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

http://ec.europa.eu/research/participants/portal/desktop/en/home.html

## Kontakt MSCA-Team in der FFG:

http://www.ffg.at/content/marie-sk-odowska-curie-ma-nahmen

Therese Lindahl – NCP:    therese.lindahl@ffg.at
    057755-4604

Sonja Heintel – Expert:    sonja.heintel@ffg.at
    057755-4608

Yasmin Dolak-Struß – Expert:    yasmin.dolak@ffg.at
    057755-4606

**Rechtzeitig registrieren!**

**Proposal Check „Deadline":**
**24.8.2014**

**IF-DEADLINE:**
**11.9.2014, 17:00:00!**

# VIEL ERFOLG!!!