Management and knowledge of European research model and promotion of research results

5.Marie Sklodowska Curie Action Individual Fellowship

Alessia D'Orazio

Scientific Officer - Ufficio INFN Bruxelles
Servizio Fondi Esterni
alessia.dorazio@lnf.infn.it

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Individual Fellowship

http://ec.europa.eu/research/participants/data/ref/h2020/wp/2016_2017/main/h2020-wp1617-msca_en.pdf

IF is an individual grant for ERs who move to another country, to support their **mobility, research, innovation, training and network**

Objective:

- **Increase the creativity and innovative potential** of **experienced researchers** (**ER**) from any discipline and nationality, emphasising **mobility**
- Provide opportunities to **acquire new knowledge** by working on research projects in a European context or outside Europe
- Special eligibility conditions for those resuming a career or returning to Europe
- **Mono-beneficiary** project (the Host Institution that will employ the ER)

  Host Institution and Supervisors need to be the 'best fit' for the project and its training components, with this unpacked in detail in the application form

Individual Fellowship

Scope:

- **Individual** and **transnational fellowship** that are awarded to the best researchers or those who are the most promising
- **Focused on career development**, not on experience
- Bottom-up approach

Expected impact:

- Extracting the **full potential from researchers** and achieve a **significant development in their careers** in both academic and non-academic sector
- **Strengthen the contact network** of the researcher and the host organisation

Individual Fellowship

Guide for applicants

http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-if_en.pdf

Experienced research (ER) must be in possession of a doctoral degree or have at least 4 years of full-time equivalent research experience* at the time of the call deadline

*measured from the date when a researcher obtained the degree entitling him/her to embark on a doctorate ('laurea' for IT)

European Fellowship

Standard EU Fellowship (ST)
8 scientific areas panel

Career Restart Panel(CAR)
1 multidisciplinary panel

Reintegration Panel (RI)
1 multidisciplinary panel

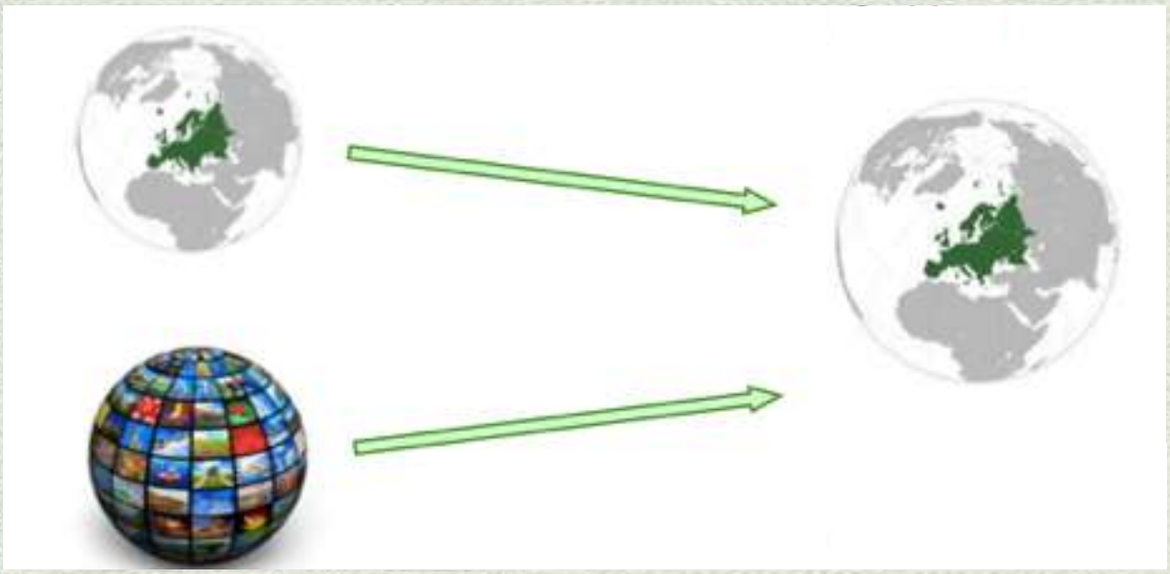
Society&Enterprise Panel (SE)
1 multidisciplinary panel

- Chemistry (CHE)
- Economic Sciences (ECO)
- Environment and Geosciences (ENV)
- Information Science and Engineering (ENG)
- Life Sciences (LIF)
- Mathematics (MAT)
- Physics (PHY)
- Social Sciences and Humanities (SOC)

Global Fellowship

8 scientific areas panel

IF Topics: EF and GF



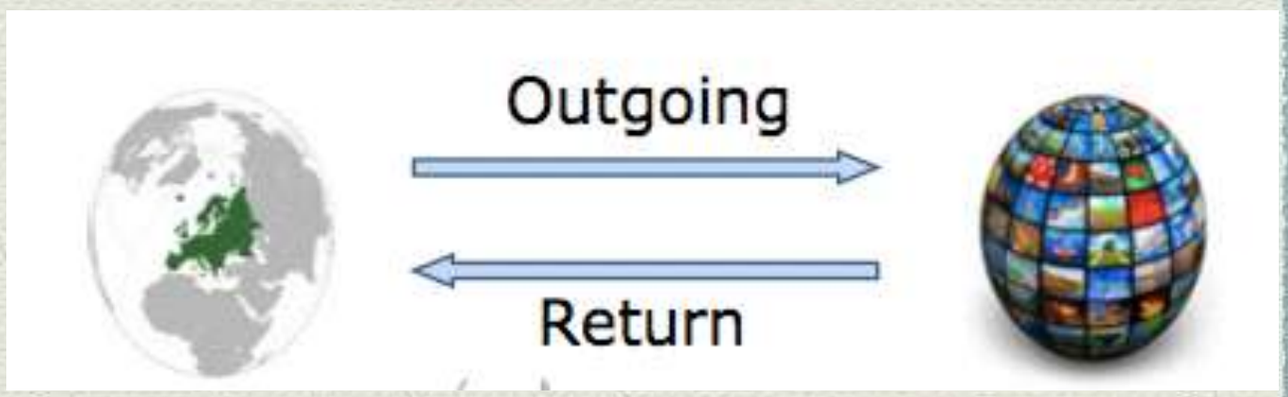
European Fellowship

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

Any Experienced Researcher may submit only one proposal (EF or GF) to this call for proposals.

Global Fellowship

For fellows from Europe going to Third countries (12-36 months) and returning (12 months)



Mobility rules
(eligibility condition)

European Fellowship

For EF-ST panel ER must not have resided or carried out his/her main activity (work, studies, etc.) in the country of the beneficiary (host organisation) for more than 12 months in the 3 years immediately prior the call deadline (**for CAR, RI and SE panels** - more than 3 years in the last 5 years)

Global Fellowship

the researcher must not have resided or carried out the main activity (work, studies, etc.) in the TC partner organisation where the initial outgoing phase takes place for more than 12 months in the 3 years immediately before the call deadline

Check carefully all the eligibility condition on the guide for applicants

Individual Fellowship: financial

- Grant covers up to 100% of costs
- Funding is calculated according to **fixed rates**, which is then adjusted through the application of a correction co-efficient
- No detailed financial reporting
- The Host institution must appoint the Experienced Researcher under an **employment contract** and ensure they are **covered under a social security scheme**
- EU contribution (value of award) is automatically calculated from information in part A of the proposal, **person months simply multiplied**

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

***adjusted** through the application of a **country correction coefficient**

IF: award criteria

scheme of evaluation criteria mirrors structure of proposal outline; deliberately indicate how each criterion is approached, draw on same terminology to do so.

- Evaluator give a **score of between 0 and 5 to each criterion** based on his/her comments
  - Usually marks in step of 0.1
  - **No individual threshold**
- **Total score calculated weighting singles scores**
  - **Overall threshold** for entering the ranking list is 70/100

IF: Marie Skłodowska-Curie Individual Fellowships		
Excellence	**Impact**	**Quality and efficiency of the implementation**
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	**Enhancing the potential and future career prospects of the researcher**	Coherence and effectiveness of **the work plan**
Quality and appropriateness of the training and of the two way **transfer of knowledge** between the researcher and the host	Quality of the proposed measures to exploit and **disseminate** the project results	Appropriateness of the allocation of **tasks and resources**
Quality of the supervision and of the integration in the team/institution	Quality of the proposed measures to **communicate** the project activities to different target audiences	Appropriateness of the **management structure and procedures**, including risk management
Capacity of the researcher to reach or re-enforce a position of professional maturity/independence		Appropriateness of the **institutional environment** (infrastructure)
50%	**30%**	**20%**
Weighting		
1	**2**	**3**
Priority in case of *ex aequo*		

Before you begin writing your proposal…

General advises

- Read **carefully** the official documentation: WP, guide for applicant (http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-if_en.pdf), template
  - **understand MSCA IF rationale**, evaluation criteria and build your proposal around them:IF deal with the mobility of researchers and are supposed to have a **training effect** and/or an **impact on the transfer of knowledge**. **A MSCA is not a mere research project!** Keep this in mind when setting up the project.
- **Mandatory** use of the template provided on the Participants Portal
- Search for the most suitable Host Institution for your project.
  - Get in contact with researchers, team leaders, principal investigators to find out who fits in and with whom you would like to collaborate.
  - The project **should be a self-contained project**, not just a follow-up of a former project or a copy-paste of!

General advises

- Set up your project in close collaboration with your future supervisor/ partners
- You need to **address all of the award criteria** (Keep the award criteria scheme and the self-**evaluation checklist** * by you while writing your proposal to ensure you fully cover each point)
  - if you do not address (sufficiently) the issues raised by the evaluation criteria, you may not obtain any mark on that criteria
- Do not rely solely on former projects you might get your hand on. Structure, award criteria, page limits etc. might change from year to year.
- Expected impact: study the impact requirements extremely carefully, check that your proposed project satisfy **all** the impact requirements of the topic.

* self-evaluation form : http://ec.europa.eu/research/participants/data/ref/h2020/call_ptef/ef/2016-2017/h2020-call-ef-msca-if-2016-17_en.pdf

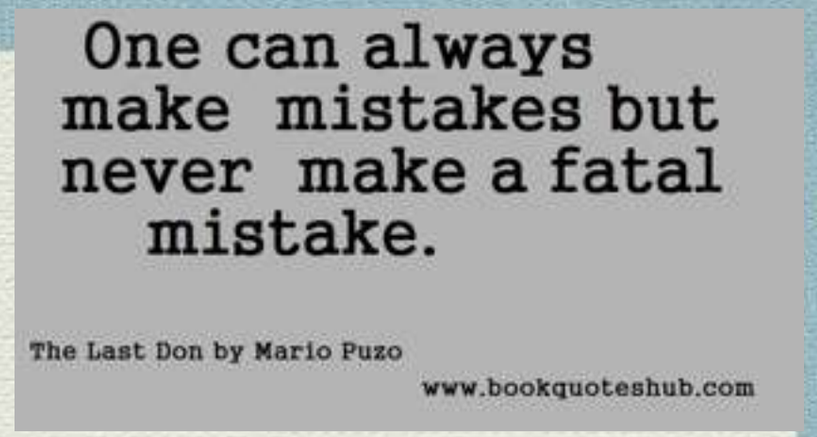
General advises

- Be emphatic with the reviewers
- Evaluators would like to have: **minimum effort** (easy to read, follow and assess against the criteria) and **maximum accuracy** (easy to provide feedback)
- Facts and external references supporting your statement instead of opinions
- **Be concise**: Avoid open / empty statements. **Go to the point** and provide 'just enough' details needed to cover what is requested and needed for the reader to understand
- Template is repetitive: Be repetitive (or refer to the place where you elaborate on the topic)

General advises

- You can slightly influence the type of evaluator who will read your proposal:
  - **Choose the right evaluation panel** (if you apply for EF-ST or GF): if you do not clearly belong to one, choose the one (you think) can best appreciate your CV and your project
- Conservative when choosing **specific keywords** or too specific abstract
- <u>Avoid open/ambiguous terms</u>
- Evaluator are chosen matching keywords (and abstract) of your proposal and the keywords they used to define themselves (field of expertise)
  - Check the public list of evaluators of the previous years. Think of 3-4 persons who would be the excellent evaluators for your proposal: What keywords do they use to define themselves?

These mistakes can be fatal



- No respect for instructions.
- Lack of understanding of the evaluation criteria.
- Poor analysis and description of the starting points (e.g. state of the art) and the objectives of your project.
- Insufficient details on planned activities as evidence to convince evaluators of impact.
- **Poor impact analysis**.
- Small relevance of the project for the call objectives (e.g. a proposal with no planned training for the ER has small relevance for a MSCA IF)
- Text of different parts of your proposal is not consistent: evaluator get confused!

Writing your proposal

IF Template - Part B

In drafting PART B of the proposal, applicants <u>must follow</u> the structure outlined below.

<u>DOCUMENT 1 (13-PAGE LIMIT APPLIED)</u>

START PAGE (1 page)

LIST OF PARTICIPATING ORGANISATIONS

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

1. **EXCELLENCE**
2. **IMPACT**
3. **QUALITY AND EFFICIENCY OF THE IMPLEMENTATION**

STOP PAGE COUNT (MAX 10 PAGES SECTIONS 1-3)

<u>DOCUMENT 2 (NO OVERALL PAGE LIMIT APPLIED)</u>

4. **CV OF THE EXPERIENCED RESEARCHER**
5. **CAPACITIES OF THE PARTICIPATING ORGANISATIONS**
6. **ETHICAL ASPECTS**
7. **LETTER OF COMMITMENT OF PARTNER ORGANISATION (GF ONLY)**

Official template: Section 1

1. Excellence[24]

1.1 Quality and credibility of the research/innovation action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects)

You should develop your proposal according to the following lines:

- Introduction, state-of-the-art, specific objectives and overview of the action.
- Research methodology and approach: highlight the type of research / innovation activities proposed.
- Originality and innovative aspects of the research programme: explain the contribution that the action is expected to make to advancements within the action field. Describe any novel concepts, approaches or methods that will be implemented.
- 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.

- The interdisciplinary aspects of the action (if relevant).
- Explain how the high-quality, novel research is the most likely to open up the best career possibilities for the *experienced researcher* and new collaboration opportunities for the host organisation(s).

IF: PartB1-Section 1

Sec. 1.1: Quality and credibility of the research/innovation action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspect)

- ✦Clear description of the state-of-the-art related to your research topic
- ✦Describe the **appropriateness** of the research proposed against the state of the art and why it is **timely** and **credible**.
- ✦Describe the scientific, technological, socio-economic motivations or other **reasons** for carrying out further research in the field covered by your project
- ✦Explain the contribution to science your project is expected to make, show clearly how your project adds up to the state-of-the-art within the project field: clear and specific description of the **research objectives** against the background of the state of the art, and the results hoped for
  - Does the proposal address a well formulated problem? Is it an important problem or just an interesting scientific challenge? Why is it important for future research?

IF: PartB1-Section 1

Sec. 1.1: Quality and credibility of the research/innovation action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspect)

- If your proposal is over-ambitious, the evaluators will find it unrealistic. If it is too modest, the evaluators will find it not ambitious enough. Are the objectives of your project achievable and feasible within the lifespan of the project? What will be achieved in the duration of the project?
- The proposal must **explain your idea, methodology and novelties in sufficient detail** to convince the evaluator that they have some substance, and should explain why there is a reason to believe that it is indeed a good project. It is not enough merely to identify wish-list of desirable goals. There must be technical substance to the proposal.
- Highlight **interdisciplinary**/multidisciplinary and/or **inter-sectorial** aspects

Claim asap "*The aim of the project, the final goal of the project*"

Official template: Section 1

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

Describe the training that will be offered.

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.

IF: PartB1-Section 1

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

- The project should be shaped in order to significantly develop and widen the competences of the applicant, primarily through training-through-research, but also in terms of multi- or interdisciplinary expertise, inter-sectoral experience and/or complementary skills.
- Clear and specific description of the **training/transfer of knowledge objectives** aimed to diversify the applicant's competence in terms of skill acquisition and to reach a realistic and well-defined objective in terms of career advancement (e.g. strengthening or attaining a leading independent position, or resuming a research career after a break).
- For GF also explain how the newly acquired skills and knowledge in the Third Country will be transferred back to the host institution in Europe during the incoming phase

Official template: Section 1

Typical training activities

- 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 transferrable 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)
- 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

Some Examples

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

- The ER will serve as an intermediate for the development of collaboration between local researchers working on XXX and researchers involved in XXX
- The ER will learn from the both the scientist in charge and postdoctoral students under his super- vision
- The ER will thus acquire, through regular working groups and specialised seminars as well as regular weekly meetings with the scientist in charge, knowledge about topics related to the [acronym] project, e.g. [add list of topics]
- The ER will thus acquire, through regular working groups and specialised seminars as well as regular weekly meetings with the scientist in charge, knowledge about topics related to the [acronym] project, e.g. [add list of topics]. Conversely the ER will be given the opportunity to share his expertise on [add your topic of expertise]
- The ER will have the option to follow numerous training programs for improving researcher and complementary skills (organised by XXX), such as [topic of] courses to improve [kind of] skills.

Official template: Section 1

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

- Qualifications and experience of the supervisor(s)

  Provide information regarding the supervisor(s): the 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.

- Hosting arrangements[25]

  The application must show that the experienced researcher will be well integrated within the team/institution in order that all parties gain maximal 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 GF 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.

[26] The 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.

IF: PartB1-Section 1

Sec.1.3: Quality of the supervision and of the integration in the team/ institution

- Write down explicitly measures taken by the host for providing quantitative and qualitative **mentoring/tutoring** (e.g. meeting with supervisor, strict connections with experienced personnel in host group,…)
- **Note**: **Practical arrangements** in place to host a researcher coming from another country. What support will be given to help settling into host country (in terms of language teaching, help with local administration, obtaining permits, accommodation, schools, childcare, etc.) **can go in implementation section**.

EXAMPLE: "Fortnightly/weekly meetings will be held between the supervisor and the ER to monitor the advancement and define the strategy, in order to take proper actions to fulfil the deadlines."

Refers also to "host group meetings".

Official template: Section 1

1.4 Capacity of the researcher to reach or re-enforce a position of professional maturity/independence

Applicants should **demonstrate** how their professional experience and the proposed research will contribute to their development as independent/mature researchers, **during** the fellowship.

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.

A complete **Career Development Plan should not be included in the proposal**, but it is part of implementing the action in line with the European Charter for Researchers. It should aim at reaching 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 plan should be devised 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.

IF: PartB1-Section 1

Sec.1.4:Capacity of the researcher to reach or re-enforce a position of professional maturity/independence

- Demonstrate that the ER has shown during her/his career a high potential to reach or re-enforce a position of professional maturity in research, and how this will be reinforced by the new skills acquired during the fellowship
- In practice: *"...this is who I have been in the past (briefly) and therefore I can do it even better in the future through this Fellowship that can contribute to my professional development as independent/ mature researcher…[explain how]"*

For CDP: **EXAMPLE**: The supervisor and the ER will draw together a Career Development Plan, with the major accomplishments expected from this research project in light of short-term and long-term career objectives.

ESRs examples: Excellence

Criterion 1 - Excellence **EF-ST proposal, not funded, total score < 80**

Score: **3.90** (Threshold: 0/5.00 , Weight: 50.00%)

STRENGTHS

- *The project develops a novel [redacted] that could have a large impact on a topic of societal importance.*
- *The benefits of the method are thoroughly discussed.*
- *The multidisciplinary applications of the project are clearly described.*
- *The researcher will be able to manage a project for the first time.*
- *The supervisor has extensive experience in the supervision of researchers and project management.*
- *The hands-on training in the development of [redacted] will greatly benefit the development of the researcher.*

WEAKNESSES

- *The state of the art is not clearly described, especially the additional innovation over existing techniques for [redacted]*
- *The radiochemistry [redacted] for this type of application is not well described.*
- *Student supervision is only briefly mentioned and the contribution of the researcher cannot be assessed from the information available.*

ESRs examples: Excellence

Criterion 1 - Excellence GF proposal, not funded, but total score > 90

Score: **4.60** (Threshold: 0/5.00 , Weight: 50.00%)

Strengths:

+ The project is highly innovative as it involves the application of [redacted] technology.
+ It is inter-sectoral in that the researcher will spend some of the time with an industrial partner working on [redacted]
+ The complementary aspects and experience of the partners are very clearly explained.
+ There is a clear description of the exchange of know-how between all of the partners.
+ Both supervisors at the outgoing and incoming hosts are senior researchers with a significant record of achievement.
+ The researcher has an excellent track record, is clearly highly motivated and has obvious potential to become a first-class scientist.

Weaknesses:

- The potential application of this technology in other fields [redacted] is not explained in enough detail.
- Not enough information is provided on how the applicant will gain teaching and supervisory expertise.
- Training in useful skills such as grant application writing and raising research funds is limited.

ESRs examples: Excellence

Criterion 1 - Excellence **EF-ST proposal, funded, total score > 92**

Score: **4.70** (Threshold: 0.00/5.00 , Weight: 50.00%)

STRENGTHS

- The research, which is of very high quality, is based on an original innovative idea of the researcher and has the potential to lead to the design, development and exploitation of a completely new type of [redacted] detector. The use of [redacted] will also capitalize on the property to maximize the detector resolution.

references to innovative parts

- The detector technology to be developed may find uses in some other fields of experimental physics.

- The proposal very adequately describes the high level of the transfer of knowledge to which the researcher will be exposed during the fellowship. The new experimental techniques which the researcher will have the opportunity to learn, including a deep understanding of [redacted] technology, are clearly presented and are of high quality, complementing the already significant knowledge in detector technology that the researcher possesses.

- The researcher's previous knowledge in [redacted] will all be used in the proposed project, and the knowledge will be transferred to her collaborators at the host institution through their joint work.

- The supervisor is a leading scientist with a very impressive publication and achievements record and vast experience in [redacted] detector development.

- The quality of the supervision is very high. In addition to the primary supervisor, the team at the host institute that will be involved in the project are all experts in the field.

- Hosting arrangements are adequate.

- The researcher has worked in different working environments and different experiments. She possesses a very high capacity for a fast development of her professional maturity.

- This is the first research project that the researcher will independently lead and manage, and thanks to adequate advice of the supervisor she will gain knowledge and experience as an independent research leader.

- The fact that the proposed research is based on a significant original initiative of the researcher further testifies to the scientific capacities of the researcher.

WEAKNESSES

- One of the objectives of the project is to [redacted], but there is a complete absence of any comparison to the competition – e.g. [redacted]

Official template: Section 2

2. Impact

2.1 Enhancing the potential and future career prospects of the researcher

Explain the expected impact of the planned research and training on the future career prospects of the experienced researcher **after** the fellowship.

Describe the added value of the fellowship on the future career opportunities of the researcher.

Which new competences and skills will be acquired? How should these make the researcher more successful?

Sec.2.1: Enhancing the potential and future careers prospects of the researcher

- Demonstrate the potential **contribution of the fellowship in the medium-/long-term to your career development** (or reestablishment). Describe the **impact of competencies and skills acquired** during the fellowship on your future career prospects as researcher. Remember to include also impact of exposure to transferable skills training, with special attention to exposure to the industry sector, where appropriate.
- Development of international **cooperation and collaborations** with other research groups/Countries can enhance your career prospects.

Some Examples

Sec.2.1: Enhancing the potential and future careers prospects of the researcher

✦The MSCA fellowship will provide **training** that will **complement** the ER's competitive research profile with **further secondary skills** that are indispensable for a successful academic career. [Write some example: e.g. teaching, supervision of students, organisational matter]

- The **training** concerning organisational matters **will improve** the ER's profile to make him an excellent candidate for lecturer or assistant professor positions, which require proof of management and leadership skills

Some Examples

Sec.2.1: Enhancing the potential and future careers prospects of the researcher

- ER **will actively take part**, together with the Supervisor, **in the responsibility and management** of the research and financial aspects of the project. This will give the ER the chance to improve and expand not only his/her specific scientific know-how in XXX, but especially his/her management and team coordination skills.
- All these opportunities will make the ER grow personally and professionally to the level of a completely independent and mature researcher, while at the same time giving her/him the chance of being reintegrated inside the European community (in case of mobility from TC to EU).

Official template: Section 2

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, e.g. communicated, transferred into other research settings or, if appropriate, commercialised. Describe, when relevant, how intellectual property rights will be dealt with.

A 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 action activities to different target audiences

The frequency and nature of communication activities should be outlined in the proposal. Concrete plans for the above must be included as a deliverable.

A concrete planning for section 2.3 must be included in the Gantt Chart (see point 3.1).

Dissemination and Communication

Be careful: don't mess up with the meanings of the 2 terms!

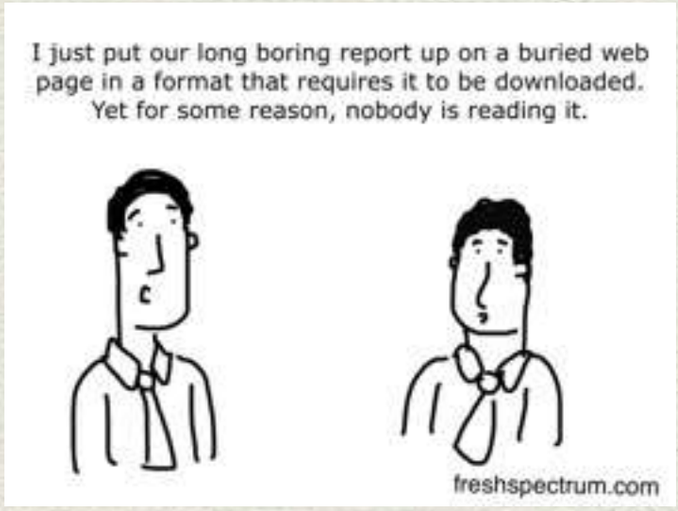
Dissemination is the public disclosure of the results of the project in any medium,. It makes research results known to various stakeholder groups (like research peers, industry and other commercial actors, professional organisations, policymakers) in a targeted way, to enable them to use the results in their own work.

Mainly aimed at peers, usually other researchers working in the area of the proposed project.

Communication is the promotion of the action and its results, by providing targeted information to multiple audiences (including the media and the public) in a strategic and effective manner.

Aimed at non specialists, including stakeholders whose interest is in potential application of the results.

http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-comm_en.pdf



Exploitation

Exploitation *is the use of the results during and after the project's implementation. It can be for commercial purposes but also for improving policies, and for tackling economic and societal problems*.

There's a **close link between dissemination and exploitation**. Dissemination (sharing research results with potential users) feeds into exploitation (using results for commercial purposes or in public policymaking). Often there is some overlap between them, especially for close-to-market projects.

Including a business plan as part of the project proposal in some projects allows participants to better outline increased economic impact of the project activities.

IF: PartB1-Section 2

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

- Specify appropriate dissemination plan for the research outputs:
  - Peer review publications (give details), conference proceedings and presentations
  - Detail the end users and target groups - scientific communities
  - Timeline for dissemination activities (can go in the Gantt Chart)
- Specify any dissemination channels that will be used
  - Public lectures, workshops, seminars, symposia, summer schools, consultation groups, attendance at exhibitions/fairs.
- Describe plans for the management of knowledge (intellectual property) acquired in the course of the project and plan for exploitation.

IF: PartB1-Section 2

Sec.2.3: Quality of the proposed measures to communicate the action results

✦Communication initiatives directed at general public to create awareness of the importance of research to society and to raise awareness of MSCA, e.g.

- MC Ambassador, Workshop Day, Summer-School Week: to raise scientific awareness, for school/university students.
- Marie Curie Project Open Day: Students and the general public visit the research institutions or labs and receive a first hand experience or lectures.
- Public talks, TV-Talks, podcasts and articles in Newspapers about the results of the project and how these results could be relevant to the general public.
- **Participation to European Researchers' Night** (ERN).

IF: PartB1-Section 2

Sec.2.3: Quality of the proposed measures to communicate the action activities to different target audiences

- e-Newsletters: MC fellows develop a web-based document to be released on the internet for the attention of the public at large (e.g. Wikipedia).
- Multimedia releases: MC fellows make video-clips to be released on the internet, in spaces open to the public at large.

Ask to your host institution which activities they have/plan for outreach, and collaborate with them.

Official guideline for outreach and communication activities in the MSCA under H2020
http://ec.europa.eu/assets/eac/msca/documents/documentation/publications/outreach_activities_en.pdf
includes list of possible activities: USEFUL TO PICK-UP SOME IDEAS

ESRs examples:Impact

Criterion 2 - Impact EF-ST proposal, not funded, total score < 80

Score: **3.90** (Threshold: 0/5.00 , Weight: 30.00%)

Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives
Effectiveness of the proposed measures for communication and results dissemination

STRENGTHS

- The addition of hardware design and characterisation skills will considerably enhance the potential of the researcher.
- The host institution will expose the researcher to multidisciplinary partners.
- Very good provisions have been made for outreach activities related to the project.
- The dissemination plan is adequate and follows the usual practices in the field.

WEAKNESSES

- The impact of the project on the career path of the researcher is not discussed in much detail.
- Specific training measures, in areas such as applying for research funding, that enhance the potential of the researcher beyond the research training objectives are poorly outlined.
- Intellectual property (IP) has already been protected for this type of [redacted], but the management of new IP that will arise here has not been dealt with adequately.

ESRs examples:Impact

Criterion 2 - Impact — **GF proposal, not funded, but total score > 90**

Score: **4.40** (Threshold: 0/5.00 , Weight: 30.00%)

- **Enhancing the potential and future career prospects of the researcher**
- **Quality of the proposed measures to exploit and disseminate the action results**
- **Quality of the proposed measures to communicate the action activities to different target audiences**

Strengths:

+ The project will certainly add to the career prospects of the researcher. In particular, the additional competencies he will acquire in [redacted] techniques at the outgoing host are a welcome broadening of the researcher's skills base.

+ The project contains a comprehensive and convincing description of the enhanced career perspectives that will open up for the researcher.

+ Scientific dissemination is foreseen through publications in peer reviewed journals and presentations at international conferences.

+ Other applications of the technology are foreseen, both commercial and scientific.

Weaknesses:

- Waiting to establish a career development plan until the start of the third year is not optimal.

- Measures to be undertaken to establish a leadership position in European academia lack detail.

- The public outreach plan is not described in enough detail. In particular, it is not sufficiently targeted in terms of the project but is instead of a rather generic nature.

ESRs examples:Impact

Criterion 2 - Impact **EF-ST proposal, funded, total score > 92**

Score: **4.50** (Threshold: 0.00/5.00 , Weight: 30.00%)

Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives
Effectiveness of the proposed measures for communication and results dissemination

STRENGTHS
- The realisation of the scientific project will allow the researcher to gain new knowledge and new skills that will be of paramount importance in providing her with new career perspectives. The anticipated role for the researcher will train her well to lead a team on development of a detector for [redacted] and also for some other applications.
- The researcher will lead this project, co-ordinating the activities of a research team from the outset. This will raise her profile in the community and help her integration into the European activity in the field.
- The proposed project, if successful, will enable significant progress in the research of one of the most fundamental questions in physics.
- Scientific dissemination will be through the usual channels of publications and presentations at conferences. The researcher will strive to bring the results also to the attention of experimental physicists working on somewhat different topics, where the detector technologies that will be developed might be relevant.

WEAKNESSES
- IP strategy is not adequately addressed.
- The researcher declares her interest to participate in the diverse outreach activities that are being carried out at the home institution, but no specific plans are presented.

Official template: Section 3

3. Quality and Efficiency of the Implementation

3.1 Coherence and effectiveness of the work plan

The proposal should be designed in such a way to achieve the desired impact. A Gantt Chart should be included in the text listing the following:

- Work Packages titles (for EF there should be at least 1 WP);
- List of major deliverables, if applicable;[26]
- List of major milestones, if applicable;[27]
- Secondments, if applicable.

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

Sec. 3.1: Coherence and effectiveness of the work plan

- Provide a detailed **work plan** including **objectives** and **milestones** to help assessing the progresses of the project (where appropriate, describe the approach to be taken regarding the intellectual property that may arise from the research project).

Work Package Model (no needed for IF)

Insert Title and WP numbers.

Table 3.1a: Work package description

For each work package:

Work package number		**Start Date or Starting Event**					
Work package title							
Participant number							
Short name of participant							
Person/months per participant:							

Used notation: M1 (month 1), M2, etc..

Objectives

How the activites contribute to obtain the results

Describe the work plan trough the list of tasks Every task should be numbered and shortly described

Description of work (where appropriate, broken down into tasks), lead partner and role of participants

Deliverables (brief description and month of delivery)

Identify deliverable with notation: e.g. for WP 2, deliberable D2.1, D2.2, etc..)

Work Package and deliverables

Work package' means a major sub-division of the proposed project.

'Deliverable' means a distinct output of the project, meaningful in terms of the project's overall objectives and constituted by a report, a document, a technical diagram, a software etc.

'Milestones' means control points in the project that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken.
A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development.

Official template: Section 3

3.2. 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 amount of person-months is appropriate in relation to the activities proposed.

3.3 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
- Research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur
- Involvement of entity with a capital or legal link to the beneficiary (in particular, name of the entity, type of link with the beneficiary and tasks to be carried out), if applicable

Official template: Section 3

Sec. 3.3: Appropriateness of the management structures and procedures, including risk management

- Provide information on how the **implementation and management** of the fellowship will be achieved and the practical arrangements that can have an impact on the feasibility of the project.
- Provide a **contingency plan** to reinforce the credibility of the project.

Official template: Section 3

3.4 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 in as far they are necessary for the good implementation of the action.

Sec. 3.4: Appropriateness of the institutional environment (infrastructure)

- ✦Specify the host institution's available infrastructures and whether these respond to the needs set by the project.
- ✦Specify the host institution's operational capacity and whether these are appropriate to the applicant's and the project's needs.
- ✦For GF also the role of partner organisations in Third Countries for the outgoing phase should appear

Official template: Gantt Chart

Example Gantt Chart

Reflecting work package, secondments, training events and dissemination / public engagement activities

																								Global Fellowship only											
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
Work package																																				
Deliverable																																				
Milestone																																				
Secondment																																				
Conference																																				
Workshop																																				
Seminar																																				
Dissemination																																				
Public engagement																																				
Other																																				

Delete rows and columns that do not apply.

Gantt Chart: example from a real project

Month	1-4	5-8	9-12	13-16	17-20	21-24
WP1						
WP2						
WP3						
WP4						
WP5						
WP6						
Deliverable			1.1 2.1	3.1	4.1	5.1 6.1
Milestone						
Conferences						
Workshop						
Seminar						
Dissemination						
Public Engagement						

ESRs examples:Implementation

Criterion 3 - Implementation **EF-ST proposal, not funded, total score < 80**

Score: **4.30** (Threshold: 0/5.00 , Weight: 20.00%)

Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Appropriateness of the management structures and procedures, including quality management and risk management
Appropriateness of the institutional environment (infrastructure)
Competences, experience and complementarity of the participating organisations and institutional commitment

STRENGTHS

- The work plan as presented in the proposal is realistic and feasible within the time frame of the project.
- Tasks associated with each work package are described.
- A good management structure has been planned for the project.
- The host environment is excellent for the project; all the infrastructure and equipment needed for the realization of the project are available.
- The commitment of the host institution to the project has been clearly presented.

WEAKNESSES

- The deliverables for the project are not described with sufficient clarity.
- The risk management lacks detail and the mitigation actions offered are incomplete.
- The work plan is not clearly described in terms of the resources allocated to the work packages.
- Measures to ensure quality are not adequately addressed.

ESRs examples:Implementation

Criterion 3 - implementation GF proposal, not funded, but total score > 90

Score: **4.50** (Threshold: 0/5.00 , Weight: 20.00%)

- **Coherence and effectiveness of the work plan**
- **Appropriateness of the allocation of tasks and resources**
- **Appropriateness of the management structure and procedures, including risk management**
- **Appropriateness of the institutional environment (infrastructure)**

Strengths:

+ A good description of the work plan is given with appropriate work packages, milestones, tasks and deliverables.
+ The Gantt chart clearly shows the time lines of the various activities required to successfully carry out the action.
+ There is a good assessment of the risks to the project and mitigation plans have been clearly described.
+ The management plan is thoroughly discussed and is adequate for the project.
+ The infrastructure is of a very high standard at both the outgoing and incoming hosts.

Weaknesses:

- The description of the methodology used to carry some of the tasks lacks sufficient detail.
- The information regarding the allocation of tasks and resources is given with insufficient clarity and lacks some detail.
- The role of the industrial partner is not properly elucidated and no mention is made of the interaction with this partner nor how it is managed.

ESRs examples:Implementation

Criterion 3: Implementation — **EF-ST proposal, funded, total score > 92**

Score: **4.50** (Threshold: 0.00/5.00 , Weight: 20.00%)

Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Appropriateness of the management structures and procedures, including quality management and risk management
Appropriateness of the institutional environment (infrastructure)
Competences, experience and complementarity of the participating organisations and institutional commitment

STRENGTHS
- The work packages are all very coherent and linked in a logical way to one another. A complete list of deliverables is given.
- The researcher will manage all aspects of the project. The management structure is simple, logical and properly described.
- The host institution possesses a vast experimental infrastructure as well as a research environment populated by a large number of high quality scientists.
- The host laboratory has a long standing association with a nearby underground facility that may provide for future developments.
- The scientists at the host institution possess competences in all the technologies and theoretical analysis methods that are required in order to complement the researcher's expertise and thus enable the performance of the proposed research. One important area is the [redacted] technology which was developed at the host institution and which will constitute a critical component of the proposed detection system.
- The host institute is highly committed to this project and will have several faculty members involved in its realization.

WEAKNESSES
- Risk analysis and mitigation measures are not presented in sufficient detail.

Official template: Section 4-CV

The *experienced researcher* must provide a list of achievements reflecting their track record, if applicable:

1. **Publications** in peer-reviewed scientific 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** led by that the *experienced researcher*.
6. **Organisation of International conferences** in the field of the researcher (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.

should be limited to maximum 5 pages

Official template: Section 4-CV

point out your qualities (no false shame)

- past merits (marks, publications, awards)
- mobility
- supervision and leadership skills
- show how your experience helps you with the proposed research

Official template: Section 5 - Capacity of organisations

Beneficiary X	**write here the full name of the Host**
General Description	
Role and Profile of key persons (supervisor)	*(names, title, qualifications of the main supervisor)*
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.*
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 Involvement in Research and Training Programmes	*Detail any (maximum 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	*Detail the EU and/or national research and training actions in which the beneficiary is currently participating*
Relevant Publications and/or research/innovation products	*(Max 5) Only list items (co-)produced by the supervisor*

Official template: Section 6-Ethics

All proposals will be checked for ethics issues

- Ethics Table is in the Administrative Forms
- If you indicate Ethics Issues in the Table:
- Clearly describe how Ethical Issues will be managed
- How does the proposal meet national legal and ethical requirements of the host country?
- Who will oversee the project's ethical aspects? E.g. institutional ethics committee, Data Protection Officer
- Provide sample consent forms etc.
- There is no page limit, so provide as much relevant information as possible

If you don't have Ethics Issues, then just mention that exactly the Proposal doesn't pose any ethics issues...or something along those lines.

Official template: Section 6

Part B-2 Section 7 - Letter 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. these should not be attached as a separate PDF file or as an embedded file since this makes them invisible.

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.

The abstract

Abstract is your “presentation ”: first impression count (determines the entire assessment).

The importance of abstract for evaluators

- Vital to allow evaluators to rapidly understand and position your proposal
- Usually used by rapporteur in giving summary of project at panel meeting
  - can be crucial for ranking
- An experienced evaluator can often make a good guess at a proposal’s score based on the abstract alone
- With experience, there are all sorts of signs that show up in the abstract
- Clear idea " easy to write abstract
- Muddled idea " hard to write abstract

Some additional bits that might be useful

An image, *a plot or a table* could says more than 1000 words, so if you can add one to the science part, doing it

Look at successful MSCA projects on CORDIS (http://cordis.europa.eu/projects/home_en.html).

Browse by Programme – H2020 – MSCA IF. Check if they have a website. You can read the projects' abstracts.

Multi- and inter-disciplinary

Multidisciplinary and interdisciplinary, as used in Horizon 2020, can be defined as follows:

Multidisciplinarity: Each discipline attempts to explain the same phenomenon from its own viewpoint resulting in independent stories.

Interdisciplinarity: Looks at some phenomena from different viewpoints but tries to integrate the explanations thus producing connecting stories.

How to choose a host institution

To obtain a MSCA grant, researchers must **submit** their application i**n cooperation with a host institution of their choosing** (mobility requirement).
You might already have a favourite institution in mind. In this case, you would contact them and, if they are interested in hosting you, prepare a proposal together.
However, you might be unsure about the destination or about which organisation to contact.
There is currently no central place where universities, research centres or companies can express their interest to host researchers with an IF grant. Some organisations take a pro-active approach, trying to be visible and catch the attention of qualified researchers. One platform for host organisations to advertise their interest in hosting a MSCA fellow is Euraxess.
Euraxess is a pan-European job search website for academia. It includes a "Marie Curie Actions" filter. Some organisations are already using this platform to attract fellows.
As a general rule however, relying on one's own networks seems to be more conducive to success.

Secondment

- Can be in the same sector (but better in a different sector, e.g. academic to non-academic)
- Must be justified (provide additional training) and **contribute significantly to** the **impact** of the IF
- Can be split into several shorter periods
- No mandatory specification of the secondment HI(s) in the proposal, but essential to give as much information as possible: sector, timing, duration, purpose
- Clearly describe secondments in Part B of the proposal
- No letter of commitment is required for secondment HI
- can be in an Institution in the same country of the beneficiary

Note: Secondments and short visits have different nature and objectives. Secondment are planned in advance and imply mobility to an organisation with specific supervision arrangement. Short visits don't.
For GF: secondment is different from the outgoing phase!!!

IF: funding thresholds 2014

European Fellowship

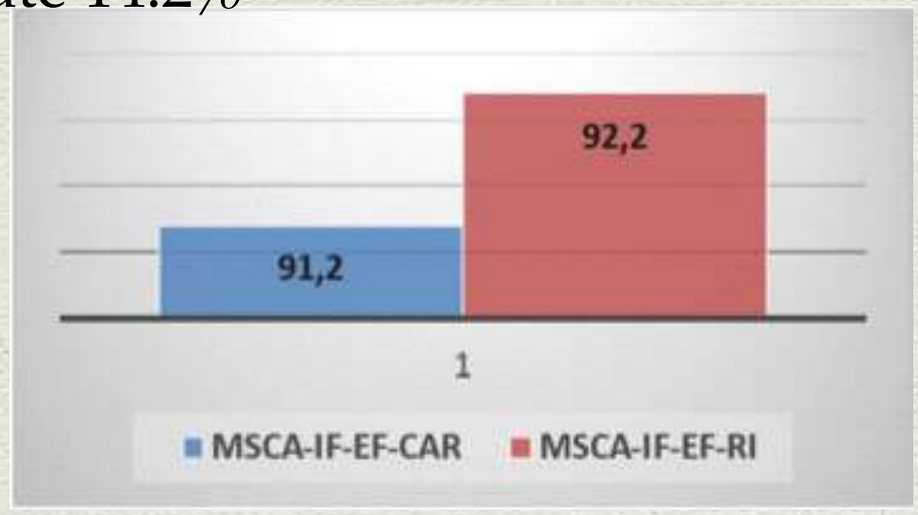
Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
CHE	89.6	88	18.40
ECO	86.6	85.4	19.10
ENG	88.6	87	18.80
ENV	90.4	89.4	18.60
LIF	90.6	89.2	18.50
MAT	90.2	88.4	18.80
PHY	90.4	89.4	18.80
SOC	92.8	90.8	18.60
CAR	87.2	85	18.20
RI	90.8	89.4	19.00

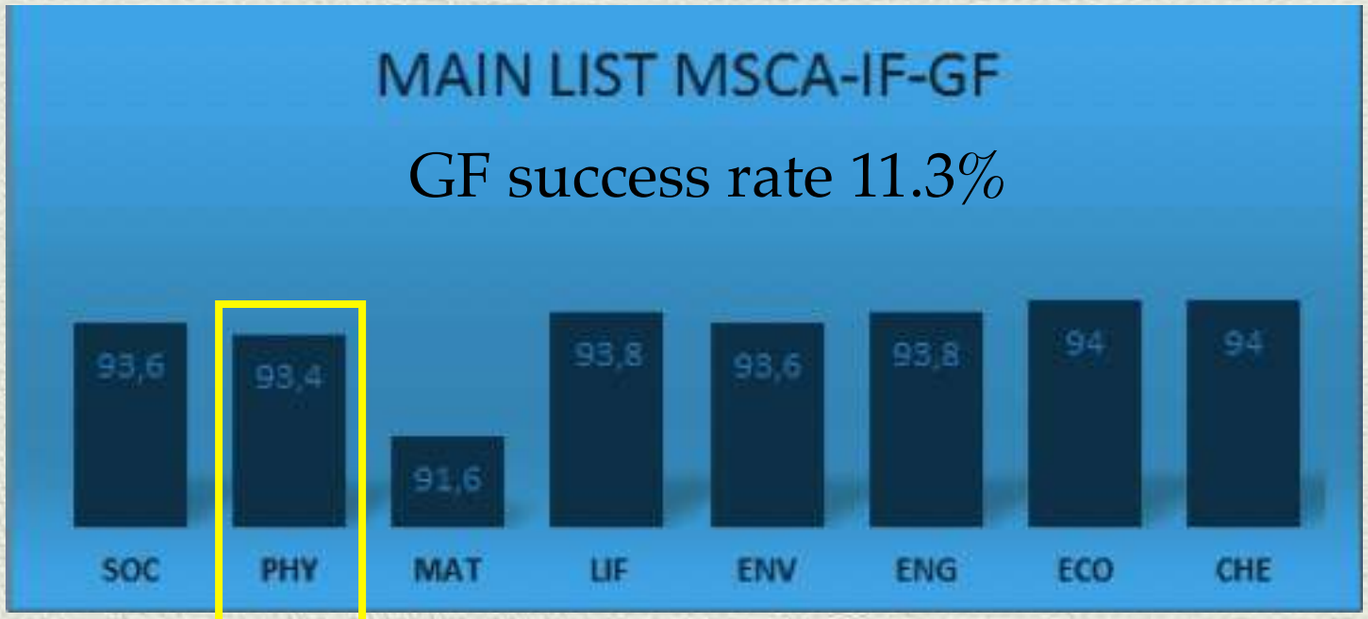
Global Fellowship

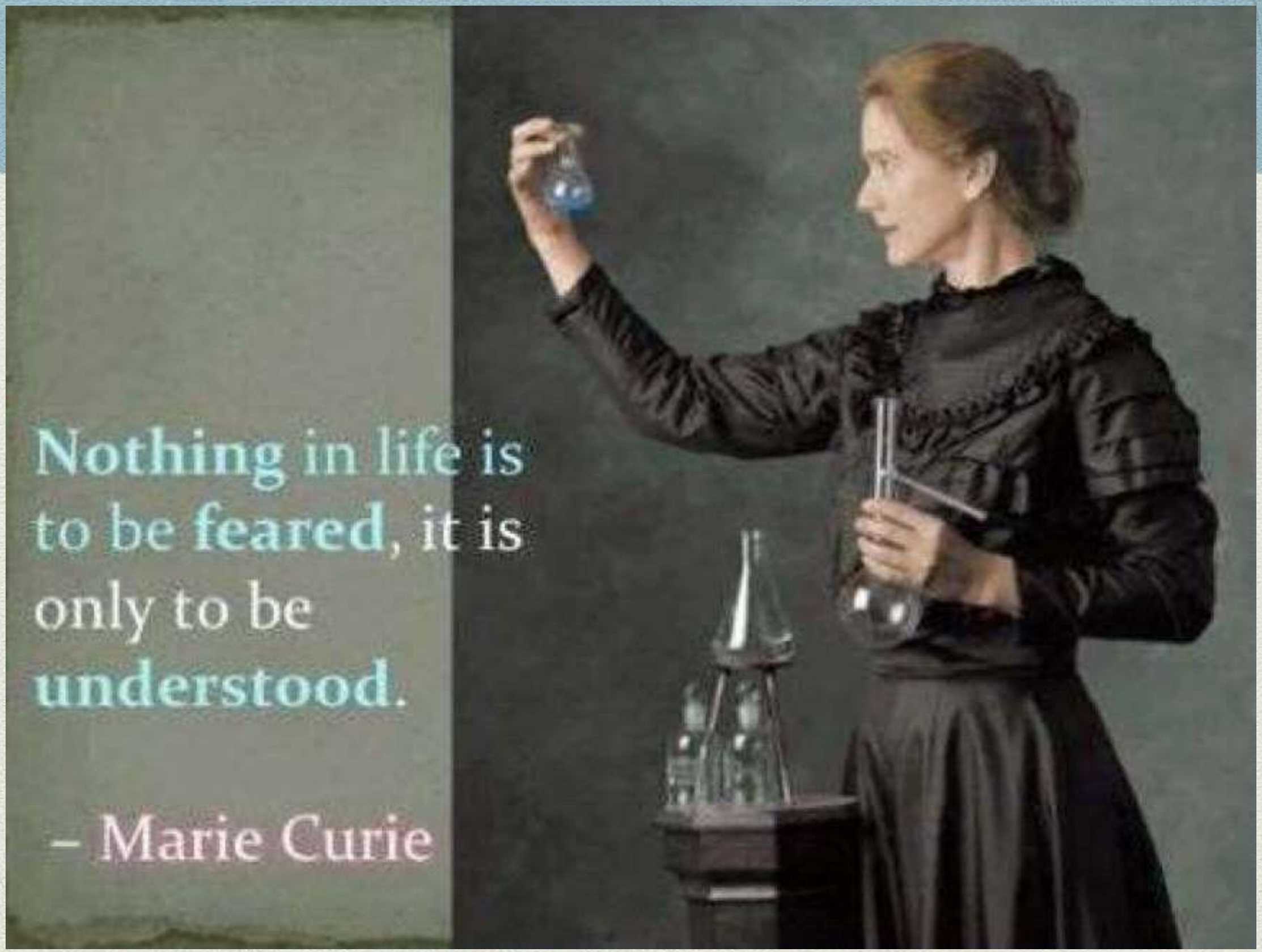
Panel	Retained List Threshold	Reserve List Threshold	Success Rate %
ECO	93.2	92	10.30
ENG	93.8	91.2	11.60
ENV	93.4	92.2	10.90
LIF	92	91	11.60
MAT	92.2	86.6	5.90
PHY	93	92.6	11.20
SOC	92.8	92.4	11.90

IF: funding thresholds 2015

EF success rate 14.2%






Nothing in life is
to be feared, it is
only to be
understood.
– Marie Curie