Individual Fellowships
Marie Skłodowska-Curie Actions
MSCA IF 2019 Call

Cristina Gómez – National Contact Point (NCP) MSCA

Webinar IF 2019
CONTENT

I. MSCA Spanish NCP Support activities

II. Individual Fellowships (MSCA IF 2019)
   - Objectives
   - Key concepts
   - Eligibility criteria and implementation modes
   - Financing

IV. Preparing an IF Proposal

VI. Some take home messages
I. The Spanish NCP Team:

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jesus.rojo@madrimasd.org  
cristina.gracia@fecyt.es
II. MSCA Basics

Training for researchers at all stages

- Excellent Science Pillar – Horizon 2020 (6.1M€)
- Funding based on Unit Costs
- Bottom-up approach

Some key concepts:
- Triple “i” Mobility
- Strong industry participation
- Acquisition of new and complementary skills
- Emphasis on communication and public engagement activities
- Excellent working conditions, gender balance and open recruitment

CHE SOC ECO ENG ENV LIF MAT PHY
III. MSCA Individual Fellowships
III. MSCA Objectives

Objective:
Enhance the **creative and innovative potential** of experienced researchers by providing them with opportunities to acquire new knowledge, work on research projects in a European context and outside Europe.

- **Fully-funded monobeneficiary fellowships** (salary + research and management costs)
- For research-focused organizations, from academic and non-academic sector
- To incorporate an **experienced researcher** in a **period of mobility** at all stages of his/her **career path**, for a 12-36 months period
- To provide them with **career development opportunities** through training and a **research project** in any scientific area (**bottom-up approach**).
III. MSCA Actors

**FELLOW**
- The researcher appointed by the beneficiary to implement the research project described in the application.
- A candidate can only submit one proposal.

**SUPERVISOR**
- The scientist appointed at the beneficiary to supervise the researchers throughout the whole duration of the action.
- For GF a co-supervisor must be appointed at the partner organization.
- A supervisor can supervise several fellows.
### III. MSCA Actors

**HOST INSTITUTION** → **BENEFICIARY**

- **Recruits, Hosts, and trains the fellow,**
- **Must be located in a Member State (MS) or Associated Country (AC).**
- ** Receives funding from EC.**
- **Signs the Grant Agreement with the EC.**

<table>
<thead>
<tr>
<th>Academic host</th>
<th>Non-academic host</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Public or private Higher Education Institutions awarding academic degrees.</td>
<td>Any other socio-economic actor not included in the academic sector definition (SME, enterprises, NGOs, hospitals, government obides, museums, libraries...).</td>
</tr>
<tr>
<td>• Public or private non-profit research organizations.</td>
<td></td>
</tr>
<tr>
<td>• International Interest EuropeanOrganisations.</td>
<td></td>
</tr>
</tbody>
</table>

**PARTNER ORGANISATION**

- **Does not recruit the fellow, offers **additional training** and hosts the researcher during his / her:**

<table>
<thead>
<tr>
<th>Secondment</th>
<th>GF outgoing phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Located in MS or AC</td>
<td>Located in a TC</td>
</tr>
<tr>
<td></td>
<td>Letter of commitment</td>
</tr>
</tbody>
</table>

**Panel**

SE
III. How to look for a Host Institution?

https://www.net4mobilityplus.eu/eoi/
III. How to look for a Host Institution?
III. Eligible researchers

Candidates must, by the call deadline:

Be experienced researchers:
- having a doctoral degree.
- at least 4 years of full-time equivalent research experience.

Comply with the mobility rule:
- Candidates must not have lived and/or worked in the country of the host institution for a certain period of time.
- For GF this rule applies at the country of the partner organisation.

Nationality restrictions apply in some cases:
- **RI**: nationals or long term residents in MS or AC.
- **GF**: nationals or long term residents in MS or AC.
III. 1 call, different options

WHERE?

EUROPEAN FELLOWSHIPS

MS/AC

- For fellows coming to or moving within European countries.
- If moving to a Widening country there will be a second chance to be funded.

GLOBAL FELLOWSHIPS

TC

- For fellows from Europe* going to a third country.
- Transfer of knowledge, through a Return Phase to Europe is mandatory.
III. News WP 2018 - 2020

- IF Career Restart Panel (CAR) and Reintegration Panel (RI) are **strengthened**
  - i.e. maximum duration of CAR prolonged to **36 months**
  - More budget (2x for CAR and 1.5x for RI)

- **Part-time work** for IF:
  - To pursue supplementary activities
  - To be agreed between supervisor and fellow
  - Minimum working time in MSCA: \( \geq 50\% \)
  - Proportional extension of project

- **Global Fellowships**
  - Possibility to spend **max. 3 months** at the European beneficiary before the outgoing mobility

Part-time should not be mentioned in the proposal! Can be requested during Project phase.
H2020 Programme

Guide for Applicants

Marie Skłodowska-Curie Actions Individual Fellowships (IF)

Version 1.2
11/04/2019

Disclaimer:
This guide aims to assist potential applicants. It is provided for information purposes only and is not intended to replace consultation of any applicable legal sources. Neither the European Commission nor the Research Executive Agency (or any person acting on their behalf) can be held responsible for the use made of this guidance document. Note that the guidance provided in the Annotated Model Grant Agreement shall prevail in case of discrepancies.

III. Clarifications Guide for Applicants IF 2019

<table>
<thead>
<tr>
<th>1.2</th>
<th>11.04.2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Clarification about complaints for failed submission</td>
<td></td>
</tr>
<tr>
<td>• Clarification on disagreement among supervisors for multiple proposals submitted by the same beneficiary</td>
<td></td>
</tr>
<tr>
<td>• Clarification on transfers of proposals to/from the Society and Enterprise Panel</td>
<td></td>
</tr>
<tr>
<td>• Clarification on Widening Fellowships</td>
<td></td>
</tr>
<tr>
<td>• Clarification on resubmissions</td>
<td></td>
</tr>
<tr>
<td>• Applicants to declare whether a similar proposal in terms of research objectives was submitted in the same call</td>
<td></td>
</tr>
<tr>
<td>• Additional details on the evaluation (including pre-allocation of proposals to experts) and review process</td>
<td></td>
</tr>
<tr>
<td>• Clarification about Ethical Issues</td>
<td></td>
</tr>
</tbody>
</table>
### III. MSCA IF: Eligibility criteria for researchers

#### European Fellowships

<table>
<thead>
<tr>
<th>Standard Fellowship</th>
<th>Career Restart Panel</th>
<th>Society and Entreprise Panel</th>
<th>Reintegration Panel</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What it is about?</strong></td>
<td>Mobility within countries</td>
<td>Inactivity in research last 12/18 months</td>
<td>Non-academic sector beneficiaries</td>
</tr>
<tr>
<td><strong>Nationality:</strong></td>
<td>ANY</td>
<td>ANY</td>
<td>ANY</td>
</tr>
<tr>
<td><strong>From / to</strong></td>
<td>Anywhere in the world to MS/AC</td>
<td>Anywhere in the world to MS/AC</td>
<td>Anywhere in the world to MS/AC</td>
</tr>
<tr>
<td><strong>Mobility Rule</strong></td>
<td>12 months / 3 years</td>
<td>36 months / 5 years</td>
<td>36 months / 5 years</td>
</tr>
</tbody>
</table>

* A period of legal and continuous residence within one or more EU Member States or Horizon 2020 Associated Countries of at least 5 consecutive years. Periods of absence from the territory of the MS or AS shall be taken into account for the calculation of this period where they are shorter than 6 consecutive months and do not exceed in total ten months within this period of five years.
III. European Fellowships: how to choose my panel

- Compliance with specific requirements.
- Available budget
- Success rate

<table>
<thead>
<tr>
<th>Fellowship</th>
<th>Budget Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE</td>
<td>8M€</td>
</tr>
<tr>
<td>CAR</td>
<td>Shared Budget of 236.49M€</td>
</tr>
<tr>
<td>RI</td>
<td></td>
</tr>
<tr>
<td>ST</td>
<td></td>
</tr>
</tbody>
</table>

**EUROPEAN FELLOWSHIPS**

- Standard Panel (ST)
- Reintegration Panel (RI)
- Career Restart Panel (CAR)
- Society and Enterprise Panel (SE)

**Widening Fellowships (WF)**

- SE: Highest success within IF rate due to novelty and difficulty to find a non-academic host.
- CAR: Double weight during budget distribution.
- RI: One and half weight during budget distribution.
- ST: One weight during budget distribution.
III. MSCA IF – Widening Fellowships (WF)

27 Widening Countries in Horizon 2020

- Shared EF Budget 2018: 5 M€
- Shared EF Budget 2019: 6 M€
- Proposals funded WF 2018: 50 under IF and 33 under WF.

MSCA IF-EF applications (GF are excluded) to a widening country not awarded will have the chance to be funded through Spreading Excellence and Widening Participation Work program.

Applicants can only be considered for this additional funding opportunity (see Annex 3), by ticking "YES" to the question "Do you wish to participate to the Widening Fellowships and thus increase your chances of being funded?" in the application form.

Applicants who do not reply, or tick "NO" to the above question, will not be considered for the WF call (but will be evaluated and ranked under the IF call, if eligible).

- No restriction to nationality applies.
- Normal award criteria, scoring and thresholds for MSCA – IF will apply.
- Single ranking list.
III. MSCA IF – Global Fellowships (GF)

- For fellows from Europe* going to a third country (TC):
  *The researcher must be national or long-term resident (5 years continuous legal residence) of a MS or AC.

- Comply with the **mobility rule at the TC**:  
  *The researcher must not have lived or worked in this TC for more than **12 months in the last 36**.

- An **up-to-date letter of commitment** from the partner organisation is needed.

- **Outgoing phase of 12-24 months**

- **Mandatory return phase of 12 months in Europe**:  
  *The fellowship can start with a justified maximum-3-months-stay at a European institution (the beneficiary or a partner organization).

- **Budget 2019**: 50 M€
- **Budget 2018**: 45 M€
- **Success rate GF 2018**: 21.68%
- **Cut off score GF 2018**: 90 (ENG) - 94.2 (MAT)
III. IF Funding

<table>
<thead>
<tr>
<th>MSCA</th>
<th>Researcher Unit Cost (person/month)</th>
<th>Institutional Unit Cost (person/month)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Living Allowance *</td>
<td>Mobility Allowance</td>
</tr>
<tr>
<td>IF</td>
<td>4.880</td>
<td>600</td>
</tr>
</tbody>
</table>

**RESEARCHER UNIT COST**

**Living Allowance:**
- CCC: country correction factor applies (host country)
- Gross EU contribution living allowance: 58,560€/year (-cuota patronal, -taxes, -S.S...) before taxes!

**Family Allowance:** determined at the submission deadline

**INSTITUCIONAL UNIT COST**

**Research, training and networking costs:**
- Purchase of material, organisation and travel to events, payment of conferences fees, etc.

**Management and overheads:**
- Indirect costs for institutions

- Budget pre-calculated by EC, base on unit costs
- 100% financing
III. IF Timing

**Call IF 2019: 294.49M€**

<table>
<thead>
<tr>
<th>Call ID</th>
<th>Opens</th>
<th>Closes</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>SE: 8.00 M€</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>GF: 50.00 M€</td>
</tr>
</tbody>
</table>

**Timetable for the H2020-MSCA-IF-2019 Call (8 months TTG)**

- **Publication** 11/04/2019
- **Closing** 11/09/2019
- **Proposals evaluation** 12/2019
- **Evaluation Results** 02/2020
- **GA signature** 05/2020

Call open for 5 months

5 months for evaluation

3 months for signature
III. Data: Expected* success rates MSCA IF 2018

*Expected: subject to signature of all proposals in GAP

14% overall expected success rate

<table>
<thead>
<tr>
<th>Success Rate</th>
<th>ST</th>
<th>CAR</th>
<th>RI</th>
<th>SE</th>
<th>GF</th>
</tr>
</thead>
<tbody>
<tr>
<td>12.40%</td>
<td>17.97%</td>
<td>19.39%</td>
<td>15.29%</td>
<td>21.68%</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Eligible</th>
<th>Main List</th>
</tr>
</thead>
<tbody>
<tr>
<td>MSCA-IF-EF</td>
<td>8855</td>
</tr>
<tr>
<td>MSCA-IF-GF</td>
<td>821</td>
</tr>
</tbody>
</table>

Proposals received: 9830
Proposals eligible: 9676
Proposals in main list: 1351
Proposals in reserve list: 721
III. Data: European Fellowships (EF) Cutt-Off Scores

<table>
<thead>
<tr>
<th>AREA/PANEL</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemistry (CHE)</td>
<td>89,6</td>
<td>90,8</td>
<td>91,8</td>
<td>91,4</td>
<td>92,8</td>
</tr>
<tr>
<td>Physics (PHY)</td>
<td>90,4</td>
<td>91,2</td>
<td>91,2</td>
<td>90</td>
<td>90,8</td>
</tr>
<tr>
<td>Mathematics (MAT)</td>
<td>80,2</td>
<td>91</td>
<td>91,6</td>
<td>91,6</td>
<td>92,6</td>
</tr>
<tr>
<td>Life Sciences (LIF)</td>
<td>90,6</td>
<td>92,4</td>
<td>92,2</td>
<td>93</td>
<td>93,6</td>
</tr>
<tr>
<td>Economic Sciences (ECO)</td>
<td>86,6</td>
<td>89,8</td>
<td>90,6</td>
<td>89</td>
<td>89,4</td>
</tr>
<tr>
<td>ICT and Engineering (ENG)</td>
<td>88,6</td>
<td>90,8</td>
<td>91,8</td>
<td>91,4</td>
<td>93</td>
</tr>
<tr>
<td>Social Sciences &amp; Humanities (SOC)</td>
<td>92,8</td>
<td>92,2</td>
<td>92,8</td>
<td>91</td>
<td>92,6</td>
</tr>
<tr>
<td>Earth &amp; Environmental Sciences (ENV)</td>
<td>90,4</td>
<td>92,2</td>
<td>92</td>
<td>92,2</td>
<td>92,4</td>
</tr>
<tr>
<td>Career Restart Panel (CAR)</td>
<td>87,2</td>
<td>91,2</td>
<td>90,8</td>
<td>91,4</td>
<td>91,2</td>
</tr>
<tr>
<td>Reintegration Panel (RI)</td>
<td>90,8</td>
<td>92,2</td>
<td>92,6</td>
<td>93,4</td>
<td>92,4</td>
</tr>
<tr>
<td>Society and Entreprise Panel (SE)</td>
<td>NA</td>
<td>NA</td>
<td>80,6</td>
<td>83,6</td>
<td>87</td>
</tr>
</tbody>
</table>
### III. Data: Global Fellowships (GF) Cutt-Off Scores

<table>
<thead>
<tr>
<th>SCIENTIFIC AREA</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemistry (CHE)</td>
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<td>94</td>
<td>93,6</td>
<td>93,2</td>
<td>92,4</td>
</tr>
<tr>
<td>Physics (PHY)</td>
<td>93</td>
<td>93,4</td>
<td>92,6</td>
<td>91,4</td>
<td>90,2</td>
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<td>Mathematics (MAT)</td>
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<td>91,4</td>
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<td>90</td>
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<td>92,4</td>
<td>90,4</td>
</tr>
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<td>93,6</td>
<td>93,6</td>
<td>92,6</td>
<td>92,6</td>
</tr>
</tbody>
</table>
IV. Preparing an IF Proposal
IV. A typical IF

- **Individual research project:** training-through-research under the direct supervision of the supervisor / key staff of the institution.

- **Hands on training:**
  - for developing scientific skills (new techniques, instruments, etc.)
  - For developing and acquiring transferable skills:
    - Proposal preparation to request funding
    - Patent applications, management of IPR, take up and exploitation of results,
    - Action management, task coordination, how to properly communicate
    - Gender issues, research integrity, Open Science, etc.

- **Intersectoral or interdisciplinary** transfer of knowledge (*secondments*...). Secondments can take place in MS / AC.

- Organization of scientific / Training / dissemination events

- Communication, outreach activities, public engagement
IV. MSCA IF: Optional Secondments

- Have to take place in a Partner Organisation in a MS / AC
- **Meaningful** and **appropriate** to the type of fellowship and research field
- Importance of the involvement of the non-academic sector
- Partner Organisations: no need to include a letter of commitment
- **Differ from short visits** and field work (possible anywhere in the world)

<table>
<thead>
<tr>
<th>IF Duration</th>
<th>Duration max. secondment</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤ 18 months</td>
<td>3 months</td>
</tr>
<tr>
<td>&gt; 18 months</td>
<td>6 months</td>
</tr>
</tbody>
</table>
IV. MSCA IF: How does it work?

**European Fellowships**
- Researcher applies with European host
- Host signs contract with EC
- Host employs researcher

**Global Fellowships**
- Researcher applies with European host
- European host signs contract with EC
- European Host employs researcher

- Supported by non-European host
- Non-European host signs agreement with European host
- Researcher seconded to non-European host
IV. Parts of a proposal

**Part A (electronically)**

- Section 1: General Information about the Proposal
  - e.g. Acronym, Title, Selection of Evaluation Panel, Project Duration...
- Section 2: Data on Participating Organisations
  - e.g. PIC, legal name, contact details, name of person-in-charge at the host organisation
- Section 3: Budget
  - Request for funding in terms of researcher months
- Section 4: Ethics Table
  - Yes/No answers to series of questions re. ethical issues
- Section 5: Call specific question
  - Open access

**Part B1 (PDF upload)**

- 1. Excellence
- 2. Impact
- 3. Implementation

  - 10 pages total
  - No section page limit
  - Excess pages will automatically be disregarded

**Part B2 (PDF upload)**

- 4. CV of the experienced researcher (maximum length: 5 pages)
- 5. Capacities of the participating organisations (1 page for the overview and 1 page for each participating organisation)
- 6. Ethical aspects
- 7. Letter of commitment of the partner organisation (for GF only)

NO COVER PAGE AND NO TABLE OF CONTENTS!
IV. IF 2019: proposals’ first glance

Title and Acronym

- Self-explanatory
- Memorable

Abstract (Part A)
Help matching with evaluators, and evaluators accept a proposal

- Be concise
- Provide enough technical/research information to help REA officers and evaluators understand the scope of your proposal
- Reflect the whole proposal including:
  - Overall research theme
  - Research objectives
  - Training objectives
  - Potential Impact, including career paths for the ESRs

Panel
matching with a set of evaluators

Descriptors
will help matching with evaluators

Can add up to five (minimum three) descriptors in order of importance:

- The 1st and 2nd descriptors must be chosen from the list provided for the scientific panel you have chosen.
- The 3rd (4th and 5th) descriptor(s) can be chosen from any of the eight scientific panels.
IV. Evaluation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Priority (ex.aequo)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellence</td>
<td>50%</td>
<td>1</td>
</tr>
<tr>
<td>Impact</td>
<td>30%</td>
<td>2</td>
</tr>
<tr>
<td>Implementation</td>
<td>20%</td>
<td>3</td>
</tr>
</tbody>
</table>

- Each proposal is scored remotely by 3 different remote evaluators. Their review form has the same headings as the proposal template.
- Each evaluator gets approx. 8 proposals to assess in a short timeframe. Clarity and readability of the proposal, both from a content and a formatting point of view, is vital.
- Each remote evaluator scores the Excellence, Impact and Implementation criteria out of 5. A “Vice-Chair” acts as rapporteur, and puts together the comments of the remote evaluations, to deliver the draft Consensus/Evaluation Summary Report back to the remote evaluators for discussion.
- The strengths, weaknesses and scores in the draft Consensus Report are discussed and agreed by the 3 remote evaluators online, through a chat-like system called “SEP”. The starting score is often the average of the 4 scores for each criterion. The Vice-Chair makes sure the comments match the score, i.e. 3 is Good, 4 is Very Good, 5 is Excellent.
- Proposals scoring above 70% are discussed and ranked by a panel of Vice-Chairs in Brussels.
### Evaluation Criteria

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Priority (ex.aequo)</th>
</tr>
</thead>
<tbody>
<tr>
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<td>50%</td>
<td>1</td>
</tr>
<tr>
<td>Impact</td>
<td>30%</td>
<td>2</td>
</tr>
<tr>
<td>Implementation</td>
<td>20%</td>
<td>3</td>
</tr>
</tbody>
</table>

**Threshold: 70%**

**No individual thresholds**
IV. ... and more...

Cross cutting issues

- International cooperation
- Social Sciences & Humanities
- Open access & Data management
- Climate action & Sustainable development
- Ethics
- Gender
- SMEs
- ERA-NETs
- Links to regional policy
- Intellectual property
- Innovation procurement

Most of these have to be addressed within the proposal

Responsible research and innovation

Focus on 6 policies:

1. Public engagement
2. Gender equality
3. Science education
4. Open access
5. Ethics
6. Governance
### IV. Excellence Section

#### 3.2.1Criterion 1: Excellence

**EXCELLENCE** is about:

- the quality and novelty of the research;
- the training activities in the project;
- the capacity of the researcher, the scientific supervisor and their interaction.

<table>
<thead>
<tr>
<th>Excellence Sub-Criteria</th>
<th>What to Evaluate</th>
</tr>
</thead>
</table>
| 1.1 Quality and Credibility of the Research/Innovation Project; Level of Novelty, Appropriate Consideration of Inter/Multi-Disciplinary and Gender Aspects | - State of the art, objectives and overview of the action  
- Completeness and appropriateness of the research methodology and approach  
- Originality and innovative aspects of the research programme  
- Gender aspects (if relevant)  
- Interdisciplinary aspects of the action (if relevant) |
| 1.2 Quality and Appropriateness of the Training and of the Two-Way Transfer of Knowledge between the Researcher and the Host | - Assess the two-way transfer of knowledge between the researcher and the host institution, in view of their future development and past experience:  
- How will the researcher gain new knowledge during the fellowship at the hosting organisation(s)  
- Transfer from the researcher to the host organisation of the previously acquired knowledge and skills  
- Global Fellowships: how will the new skills and knowledge acquired in the third country be transferred back to the host institution in Europe? |
## IV. Excellence Section

<table>
<thead>
<tr>
<th>EXCELLENCE SUB-CRITERIA</th>
<th>WHAT TO EVALUATE</th>
</tr>
</thead>
</table>
| 1.3 Quality of the Supervision and of the Integration in the Team/Institution | I. The qualifications and experience of the supervisor(s):  
- The supervisor’s level of experience on the research topic proposed and his/her track record  
II. The hosting arrangements:  
- Integration of the researcher within the team/institution  
- The nature and quality of the research group/environment as a whole  
- Measures taken to integrate the researcher in the different areas of expertise and disciplines  
- International networking opportunities the host could offer  
- Global Fellowships: assess hosting arrangements for both outgoing AND return phases. |
| 1.4 Capacity of the Researcher to Reach or Reinforce a Position of Professional Maturity/Independence | How will the researcher’s past personal experience and proposed research contribute to his/her professional development as an independent/mature researcher during the fellowship?  
- Look at the curriculum vitae (section 4 of the proposal) and evaluate the track record of the researcher in relation to the level of experience. |

What is the difference between sub-criterion 1.3 and sub-criterion 3.4?

The hosting arrangements, which are part of sub-criterion 1.3, refer to the integration of the researcher in his/her new environment at the host’s premises. This does not refer to the infrastructure of the host, as described in the implementation sub-criterion 3.4.

**Gender Dimension**

Applicants are invited to explore whether and how the gender dimension is relevant to their research. A topic is considered gender relevant where human beings are involved as subjects or end-users and it can be expected that its findings will affect groups of women and men differently. In such cases, applicants should integrate gender issues as part of their proposals. Evaluators should consider this under ‘excellence’ (sub-criterion 1.1).

Please note that in MSCA-IF, the gender balance in research teams is not relevant.
IV. Evaluation Criteria: Impact

- Increased set of skills - research-related and transferable ones - leading to improved employability and career prospects both in and outside academia.

- Enhanced cooperation and stronger networks - better transfer of knowledge between sector and disciplines - boosting of R&I capacities among participating organisations.

- Increase in ‘triple i’ mobility of researchers in Europe – strengthening of Europe’s human capital base in R&I with more entrepreneurial and better trained researchers – better communication of R&I results to society – Increase in Europe’s attractiveness as a leading destination for R&I – better quality research and innovation contributing to Europe’s competitiveness and growth.
IV. Impact Section

3.2.2 CRITERION 2: IMPACT

IMPACT refers to the impact on the fellow’s career development and the dissemination and communication activities.

<table>
<thead>
<tr>
<th>IMPACT SUB-CRITERIA</th>
<th>WHAT TO EVALUATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>2.1 ENHANCING THE RESEARCHER’S POTENTIAL AND FUTURE CAREER PROSPECTS</td>
<td>✤ Assess the expected impact of the planned research and training on the experienced researcher’s career prospects after the fellowship</td>
</tr>
<tr>
<td></td>
<td>✤ What new competences and skills will be acquired?</td>
</tr>
<tr>
<td></td>
<td>✤ Assess the added value of the fellowship on the future career</td>
</tr>
<tr>
<td></td>
<td>✤ Opportunities of the researcher</td>
</tr>
<tr>
<td>2.2 QUALITY OF THE PROPOSED MEASURES TO EXPLOIT AND DISSEminate THE ACTION RESULTS</td>
<td>✤ How will the new knowledge generated by the action be disseminated and exploited?</td>
</tr>
<tr>
<td></td>
<td>✤ The dissemination strategy</td>
</tr>
<tr>
<td></td>
<td>✤ Check whether the concrete planning is included in the Gantt chart.</td>
</tr>
<tr>
<td>2.3. QUALITY OF THE PROPOSED MEASURES TO COMMUnICATE THE ACTION TO DIFFERent TARGET AUDIENCES</td>
<td>✤ How is the action and its results being communicated?</td>
</tr>
<tr>
<td></td>
<td>✤ Check the frequency and nature of communication activities</td>
</tr>
<tr>
<td></td>
<td>✤ Check whether the concrete planning is included in the Gantt Chart</td>
</tr>
</tbody>
</table>

What is the difference between sub-criterion 1.4 and sub-criterion 2.1?

➤ Sub-criterion 1.4 “Capacity of the researcher to reach or reinforce a position of professional maturity/independence”: applicants should demonstrate how their past personal experience and the proposed research will contribute to their professional development as independent/mature researchers during the fellowship.

➤ Sub-criterion 2.1 “Enhancing the potential and future career prospects of the researcher”: the proposal should explain the expected impact of the planned research and training on the career prospects of the experienced researcher after the fellowship.
IV. Impact – Exploitation, Dissemination (section 2.2)

<table>
<thead>
<tr>
<th>Exploitation</th>
<th>Dissemination</th>
<th>Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What</strong></td>
<td>The disclosure of the project results to the public</td>
<td>Process aiming at promoting the action and its results</td>
</tr>
<tr>
<td><strong>When</strong></td>
<td>When results are available</td>
<td>From the project start on</td>
</tr>
<tr>
<td><strong>Why</strong></td>
<td>Showing society the impact and benefits of EU-funded R&amp;I activities</td>
<td>Effectively use project results, turning them into concrete value and impact for society</td>
</tr>
<tr>
<td><strong>How</strong></td>
<td>Make concrete use of research results (not just commercial)</td>
<td>Describe and ensure results available for others to USE</td>
</tr>
<tr>
<td><strong>To whom</strong></td>
<td>Stakeholders who make concrete use of the project results</td>
<td>Inform and promote the project AND its results/success</td>
</tr>
<tr>
<td><strong>Legal basis</strong></td>
<td>Grant Agreement Art. 27</td>
<td>Audiences beyond the project’s community, e.g. media, broad public</td>
</tr>
<tr>
<td></td>
<td>Grant Agreement Art. 29</td>
<td>Grant Agreement Art. 38.1</td>
</tr>
</tbody>
</table>
IV. Evaluation Criteria – Impact, section 2.2.

• Describe how the new knowledge generated by the action will be disseminated and exploited, and what the potential impact is expected to be.

• Discuss the strategy for targeting peers (scientific, industry and other actors, professional organisations, policy makers, etc.) and to the wider community.

• Also describe potential commercialisation, if applicable, and how intellectual property rights will be dealt with, where relevant.

• Concrete planning must be included in the gantt chart.

• For more details refer to the "Dissemination & exploitation" section of the H2020 Online Manual.
IV. Evaluation Criteria – Impact, section 2.2.

- 2 sections: one for dissemination, one for exploitation
- Develop a **dissemination strategy** (what – who – when – why – how), and give examples on **which journals** you target, which conferences you will attend, with which (preliminary) results
- Show the measures you will undertake to appropriately use your project’s results – commercial vs. non-commercial
- Mention **Open Access** and open data strategy (DMP Month 06!)
- Outline **plans to exploit any IP** arising from the programme, per WP
- Keep an eye on **potential IP issues**, liaise with the technology transfer services (do not forget the secondment host)
### IV. Impact – Communication (section 2.3.)

<table>
<thead>
<tr>
<th>Exploitation</th>
<th>Dissemination</th>
<th>Communication</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What</strong></td>
<td><strong>When</strong></td>
<td><strong>Process aiming at promoting the action and its results</strong></td>
</tr>
<tr>
<td>Utilisation of the project results in further activities in research, development or standardisation</td>
<td>When results are available</td>
<td>From the project start on</td>
</tr>
<tr>
<td><strong>Why</strong></td>
<td><strong>Why</strong></td>
<td><strong>Effectively use project results, turning them into concrete value and impact for society</strong></td>
</tr>
<tr>
<td>Showing society the impact and benefits of EU-funded R&amp;I activities</td>
<td>Transfer knowledge and results to enable the use and take up of results</td>
<td></td>
</tr>
<tr>
<td><strong>How</strong></td>
<td><strong>How</strong></td>
<td><strong>Inform and promote the project AND its results/success</strong></td>
</tr>
<tr>
<td>Make concrete use of research results (not just commercial)</td>
<td>Describe and ensure results available for others to use</td>
<td></td>
</tr>
<tr>
<td><strong>To whom</strong></td>
<td><strong>To whom</strong></td>
<td><strong>Audiences beyond the project’s community, e.g. media, broad public</strong></td>
</tr>
<tr>
<td>Stakeholders who make concrete use of the project results</td>
<td>Audiences with interest in the potential use of the results, e.g. scientific community, policy makers</td>
<td></td>
</tr>
<tr>
<td><strong>Legal basis</strong></td>
<td><strong>Legal basis</strong></td>
<td><strong>Grant Agreement Art. 38.1</strong></td>
</tr>
<tr>
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<td>Grant Agreement Art. 29</td>
<td></td>
</tr>
</tbody>
</table>
IV. Evaluation Criteria – Impact, section 2.3.

- Demonstrate **how the planned public engagement activities** contribute to **creating awareness** of the performed research. Demonstrate how both the research and results will be made known to the public in such a way that they can be understood by non-specialists.
- The **type of outreach activities** could range from an Internet presence, press articles and participating in **European Researchers' Night** events to presenting science, research and innovation activities to students from primary and secondary schools or universities in order to develop their interest in research careers.
- For more details, see the guide on Communicating EU research and innovation guidance for project participants as well as the "communication" section of the H2020 Online Manual.
- Concrete planning for communication activities must be included in the **Gantt chart**.
Who is your **target audience**, which key message (what kind of results) do you have for them, when do you disseminate the results, **where** and why? And how do you **measure** whether you reached your audience (key performance indicators)?

Engage a large audience, bring knowledge to the general public and imply interaction between sender /receiver

Possible Activities: **Open Doors**, Public Talks, articles, E-newsletters, multimedia releases, European Researchers’ Night, Marie Curie Alumni Association (MCAA), MSCA “Fellow of the Week” on Facebook...
## IV. Quality and Efficiency of the Implementation Section

### IMPLEMENTATION

<table>
<thead>
<tr>
<th>IMPLEMENTATION</th>
<th>WHAT TO EVALUATE</th>
</tr>
</thead>
</table>
| **3.1. COHERENCE AND EFFECTIVENESS OF THE WORK PLAN, INCLUDING APPROPRIATENESS OF THE ALLOCATION OF TASKS AND RESOURCES** | ✓ How the work planning and the resources mobilised will ensure that the research and training objectives will be reached  
✓ Whether the amount of PM planned is appropriate in relation to the proposed activities  
✓ A Gantt Chart must include:  
  ✓ Work Packages titles (at least 1 WP)  
  ✓ List of major deliverables, if applicable  
  ✓ List of major milestones, if applicable  
  ✓ Secondments, if applicable |
| **3.2. APPROPRIATENESS OF THE MANAGEMENT STRUCTURE AND PROCEDURES, INCLUDING RISK MANAGEMENT** | ✓ The organisation and management structure, as well as the progress monitoring mechanisms put in place, to ensure that objectives are reached  
✓ The research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risks occur |
| **3.3. APPROPRIATENESS OF THE INSTITUTIONAL ENVIRONEMENT (INFRASTRUCTURE)** | ✓ The beneficiary’s active contribution to the research and training activities  
✓ The main tasks and commitments of the beneficiary and partners (if applicable)  
✓ The infrastructure, logistics and facilities offered and needed for the good implementation of the action  
✓ For Global Fellowships, indicate the role of the partner organisation in Third Countries. |
IV. Parts of a proposal

<table>
<thead>
<tr>
<th>Form</th>
<th>Title</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Section 1</td>
<td>General Information about the Proposal</td>
<td>e.g. Acronym, Title, Selection of Evaluation Panel, Project Duration...</td>
</tr>
<tr>
<td>Section 2</td>
<td>Data on Participating Organisations</td>
<td>e.g. PIC, legal name, contact details, name of person-in-charge at the host organisation</td>
</tr>
<tr>
<td>Section 3</td>
<td>Budget</td>
<td>Request for funding in terms of researcher months</td>
</tr>
<tr>
<td>Section 4</td>
<td>Ethics Table</td>
<td>Yes/No answers to series of questions re. ethical issues</td>
</tr>
<tr>
<td>Section 5</td>
<td>Call specific question</td>
<td>Open access</td>
</tr>
</tbody>
</table>

- • 1. Excellence
- • 2. Impact
- • 3. Implementation
- • 10 pages total
- • No section page limit
- • excess pages will automatically be disregarded

NO COVER PAGE AND NO TABLE OF CONTENTS!

- • 4. CV of the experienced researcher (maximum length: 5 pages)
- • 5. Capacities of the participating organisations (1 page for the overview and 1 page for each participating organisation)
- • 6. Ethical aspects
- • 7. Letter of commitment of the partner organisation (for GF only)
V. Some take home messages
Get familiar with the programme!

**Funding and Tenders Participant Portal**
Documentación de apoyo para la preparación de propuestas MSCA IF 2018

10 de julio de 2018

La Oficina Europea ha preparado documentación de apoyo para aquellos investigadores y centros de acogida que estén actualmente preparando propuestas para la Convocatoria Acciones Individuales MSCA 2018.

La convocatoria MSCA Individual Fellowships 2018 cuenta con un presupuesto de 274.000€ y está abierta hasta el próximo 12 de septiembre de 2018. Su finalidad es la de fomentar la contratación de investigadores con experiencia para la realización de proyectos de investigación de 12 a 36 meses en universidades, centros de investigación, infraestructuras de investigación, empresas, PYME y otros grados socio-económicos de toda Europa y de fuera de ella.

A continuación facilitamos una serie de herramientas y documentación práctica para que los solicitantes de Individual Fellowships MSCA 2018 puedan adecuar su propuesta a los objetivos y requisitos de este programa de financiación.

WEBINARIOS Y JORNADAS INFORMATIVAS ON LINE

Puede acceder a los videos on-line de la sesión informativa IF 2018 realizada en Madrid el 28 de mayo, organizada por la Oficina Europea y la Fundación para el Conocimiento Madrileño (en español):

- Guía de Presentación Individual Fellowships 2018: documentación facilitada por la Comisión Europea, en la que se especifican los objetivos del programa, las modalidades de participación, criterios de elegibilidad, criterios de evaluación, modelo de propuesta técnica a presentar.
- Presentaciones IF 2018: presentaciones generadas en la sesión informativa celebrada en Madrid el 28 de mayo con información extensa sobre la convocatoria y aspectos prácticos de preparación de propuestas.

When preparing a proposal

- **Use the official template: and help evaluators:**
  - Include the information where requested, evaluators will look at all headings and sub-headings
  - “*Una imagen vale más que mil palabras*”: use visuals to provide global information at a glance.
  - Be aware of all criteria weight, it is not all about Excellence!
  - Be precise – less is sometimes more; structure the proposal well

- **Involve as many actors as possible:**
  - It is an individual project but a collaborative work.
  - Try to have the best match researcher/supervisor/Host Institution
  - The candidate’s employability after the fellowship is key
  - The candidates’ CV doesn’t have to be perfect, but the training should mend any shortcomings
  - Involve your own institution: European Projects Offices / Transfer of Technology Offices / HR Departments, other colleagues...
  - National Contact Points...

- **Do not leave it for the last minute!**
  - Get familiar with the Participants’ Portal, upload a version, you will be able to rewrite it.
¡Muchas gracias!

Cristina Gómez
MSCA NCP in Spain
msca@oficinaeuropea.es
Cristina.gomez@oficinaeuropea.es