MARIE SKŁODOWSKA-CURIE ACTIONS

Individual Fellowships (IF)

Ilse DE WAELE
Call Coordinator
Research Executive Agency

15 May 2018
Brussels
Marie Skłodowska-Curie Actions

**ITN**
Innovative Training Networks

**What does it offer?**
High-quality research training delivered through international and interdisciplinary networks, industrial doctorates or joint doctorates.

**Who applies?**
International networks of research organisations from the academic and non-academic sectors.

**Who is funded?**
Researchers at doctoral level (less than four years of full-time research experience and no doctoral degree).

**IF**
Individual Fellowships

**What does it offer?**
Opportunities to work on personal research projects by moving between countries and possibly sectors to acquire new skills.

**Who applies?**
Individual researchers together with the host organisation.

**Who is funded?**
Postdoctoral researchers.

**RISE**
Research and Innovation Staff Exchange

**What does it offer?**
The exchange of staff members involved in research and innovation to develop sustainable collaborative projects and the transfer of knowledge.

**Who applies?**
International networks of research organisations from the academic and non-academic sectors.

**Who is funded?**
Researchers, technical, administrative and managerial staff of any nationality and at all career levels.

**COFUND**
Co-Funding of Regional, National and International Programmes

**What does it offer?**
Regional, national or international programmes to foster excellence in researchers’ training, mobility and career development.

**Who applies?**
Organisations funding or managing doctoral programmes or fellowship programmes.

**Who is funded?**
Researchers at doctoral and postdoctoral level.
IF-2017: Results

IF-2018: Topics, Budget & Planning

Individual Fellowships – key concepts

European Fellowships explained

Global Fellowships explained

Evaluation and Award criteria

Proposals – part A and B

Novelties

Who can help you?
IF-2017: Results

8957 evaluated proposals *

1348 funded proposals

* 132 proposals ineligible, inadmissible or withdrawn
# IF-2017: Results

| Number of eligible proposals | CAR | RI | SE | ST-CHE | ST-ECO | ST-ENG | ST-ENV | ST-LIF | ST-MAT | ST-PHY | ST-SOC | GF-CHE | GF-ECO | GF-ENG | GF-ENV | GF-LIF | GF-MAT | GF-PHY | GF-SOC |
|-----------------------------|-----|----|----|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|
| 322 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 533 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 204 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 112 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 178 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 850 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 883 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 897 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 1767 proposals              |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 1763 proposals              |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 1751 proposals              |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 71 proposals                |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 91 proposals                |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 126 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 213 proposals               |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 8 proposals                |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 65 proposals                |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 32 proposals                |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |
| 2 proposals                 |     |    |    |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |        |

### How to interpret the table

- The percentage of proposals above the overall threshold and with a given score or higher is shown per ranking list. Green shows the funding range. Proposals below the overall threshold are shown separately and are not part of the cumulative total.

### Example
- In the CAR ranking, 52.8% of all proposals submitted were ranked between 50 and 91. The funding out is between 91 and 92.
- In the ST-CHE ranking, 20.9% of all proposals submitted were ranked between 50 and 91. The funding out is between 91 and 92.
- In the GF-ECO ranking, 21.8% of the proposals scored less than 70, meaning that 70 or 79 would score more than 70.
IF-2017: Results

**IF-2018: Topics, Budget & Planning**

- Individual Fellowships – key concepts
- European Fellowships explained
- Global Fellowships explained
- Evaluation and Award criteria
- Proposals – part A and B
- Novelties
- Who can help you?
IF-2018: Topics & Budget

European Fellowships

- held in EU Member States or Associated Countries

- 228M€

Call Opening: 12 April 2018
Call Deadline: 12 September 2018, 17:00:00 CET
Evaluation: October – November 2018
Launch Grant preparation: January 2019

Global Fellowships

- based on an outgoing phase to a third country and a return phase in MS/AC

- 45M€
IF-2017: Results

IF-2018: Topics, Budget & Planning

**Individual Fellowships – key concepts**

European Fellowships explained

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Proposals – part A and B

Novelties

Who can help you?
What are Individual Fellowships?

What are IFs?
- Individual trans-national fellowships to the best and most promising experienced* researchers
  (* with PhD or 4-year full-time equivalent research experience)

- **Secondments** of 3 – 6 months in Europe (MS or AC), for greater impact
- Specific eligibility criteria
- Career development with an appropriate **inter-sectoral** dimension
An Experienced Researcher may submit only one proposal to this call for proposals.

What are Individual Fellowships?

**European Fellowships**

For fellows coming to or moving within Europe
- duration 12-36 months for CAR **New!**
- duration 12-24 months for other EF

**Global Fellowships**

For fellows from Europe going to third countries (12-24 months) & returning to Europe (12 months)

Total duration 24-36 months
Which countries?

**Member States (MS)**

**Associated Countries (AC):**
Iceland, Norway, Albania, Bosnia and Herzegovina, former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia

**Third Countries (TC):** any other country
Which sectors?

Academic

Public or private **Higher Education establishment** awarding academic degrees

Public or private **non-profit research organisations**

International **European interest** organisations

Non-academic

**Broad definition:**

Any socio-economic actor not included in the academic sector definition

- Universities
- Non-profit research institutes
- IEIOs
- Industry
- SMEs
- Other socio-economic actors

EU Validation Services ultimately determine the sector of each participating organisation
A **project**:  
- is written by the experienced researcher  
- includes a concrete plan of training-through-research  
- is implemented in the host organisation’s premises  
- is under the direct supervision of the Supervisor(s)

It should have realistic and well-defined objectives in terms of **career advancement** or for resuming a research career after a break.
**Typical training activities may include:**

- **training-through-research**: individual personalised action
- Hands-on training activities for developing **scientific** (new techniques, instruments) and **transferable skills** (proposal preparation to request funding, IPR management, task coordination, supervising & monitoring, exploitation of research results)
- **Inter-sectoral or interdisciplinary transfer of knowledge** (e.g. through secondments)
- Organisation of **scientific/training/dissemination events**
- Communication, **outreach activities** and horizontal skills
- Training dedicated to **gender issues**
What is the financial contribution?

<table>
<thead>
<tr>
<th>Individual Fellowships</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></td>
<td>Family allowance</td>
<td>Research, training &amp; networking costs</td>
</tr>
<tr>
<td></td>
<td>4.880 EUR</td>
<td>600 EUR</td>
</tr>
<tr>
<td></td>
<td>Updated!</td>
<td>500 EUR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>800 EUR</td>
</tr>
<tr>
<td></td>
<td></td>
<td>650 EUR</td>
</tr>
</tbody>
</table>

*adjusted through the application of a country correction coefficient (BE= 100%)
What are secondments?

A transfer of knowledge which contributes significantly to the impact of the fellowship.

<table>
<thead>
<tr>
<th>Fellowship Duration</th>
<th>Maximum duration of 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>

- Secondment(s) should be clearly described in proposal
- Can be a single period or divided into multiple shorter periods
- Can be at more than one partner organisation located in MS/AC
- Can be to an institution in the same country as the beneficiary
- Can be in the same sector although intersectoral secondment is highly encouraged
- No letter of commitment is needed.
- Different from short visit (e.g. field work), which can be done in a TC.

A special rule for Global Fellowships applies in duly justified cases.
European Fellowships explained

IF-2017: Results
IF-2018: Topics, Budget & Planning
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Novelties
Who can help you?
An experienced researcher applies with a host institution for a research project that can last between 12 and 24/36 months*

**Host Institution (future Beneficiary)**
- Location: MS or AC
- Sector: Academic or Non-academic
- Can be International European Interest Organisation (IEIO)
- Can be International Organisation (exceptional cases)
- Appoints the Supervisor
- Recruits the experienced researcher (with a contract of employment)

**Researcher (future Fellow)**
- Must undertake transnational mobility
- Can be of any nationality (with the exception of the Re-Integration panel)

* 12 to 36 months for CAR, 12 to 24 months for other EF
EF – Standard

Not have worked/resided/studied >12 months in past 3 years in country of host organisation

8 panels
- CHE
- SOC
- ECO
- ENG
- ENV
- LIF
- MAT
- PHY

Intra EU

Incoming
One multidisciplinary panel

Not have worked/resided/studied >36 months in past 5 years in country of host organisation

Had a career break in research

Updated!
Definition of **CAREER BREAK** in research:
Not have been active in research for at least 12 consecutive months within the 18 months immediately prior to the deadline for submission of proposals (13/03/17 to 12/09/18).

*Active in research* means

- being employed in research, or
- holding a scholarship in research

The **professional status** should be clearly explained in the proposal, both in part A and B, *e.g.* unemployment, parental leave, sick leave, periods of employment outside of research
One multidisciplinary panel

If not of European nationality, researcher must have spent at least 5 years in Europe before leaving (long term residency)

Not have worked/resided/studied >36 months in past 5 years in country of host organisation

No minimum time spent outside EU

Researcher left EU

Researcher now returns to EU
One multidisciplinary panel

Non-academic sector only

Not have worked/resided/studied >36 months in past 5 years in country of host organisation
Beneficiary from the non-academic sector only:

- industry and business (including SMEs)
- government
- civil society organisations (NGOs, trusts, foundations, etc.)
- cultural institutions and museums
- hospitals
- international organisations
- ...

Earmarked budget of 8 million € & high success rate
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Who can help you?
An experienced researcher applies with a host institution for a research project that can last between 24 and 36 months (12-24 months initial outgoing phase in a Third Country + 12 months of mandatory return phase)

**Host Institution (future Beneficiary)**

- **Location:** MS or AC
- **Sector:** Academic or Non-academic
- **Can be International European Interest Organisation (IEIO)**
- **Can be International Organisation** (exceptional cases)
- **Appoints the Supervisor**
- **Recruits the experienced researcher** (with a contract of employment)
Partner Organisation

- Location: Third Country (not MS or AC)
- Sector: Academic or Non-academic
- Can be an International Organisation
- Nominates a Supervisor for the researcher
- Provides a signed Letter of Commitment in the proposal

The partner organisation

- **DOES NOT** sign the Grant Agreement
- **DOES NOT** recruit the researcher
- **DOES NOT** claim costs directly from the action

Different from EF!
**Researcher (future Fellow)**

- Must undertake mobility from ANY country to the partner organisation in the Third Country. The researcher cannot have spent more than 3 years in the last 5 years in the Third Country of the partner organisation.

- Nationality: national of MS/AC or long-term resident of a MS/AC

- Will be under the direct supervision of two Supervisors.
Global Fellowships

Not have worked/resided/studied >12 months in past 3 years in country of TC partner organisation

If not of European nationality, researcher must have spent at least 5 years in Europe before leaving (long tern residency)

Phase 1 - Outside of EU (up to 24 months)

Phase 2 - Researcher returns to EU (12 months)

8 panels

CHE
SOC
ECO
ENG
ENV
LIF
MAT
PHY
Document needed only for Global Fellowships

The Letter of Commitment has no specific template, but:

- has heading or stamp from the partner organisation
- is up-to-date (i.e. issued after the call publication, 12 April 2018)
- must demonstrate the will to actively participate in the proposed action and the precise role

If no letter of commitment is included in a Global Fellowship proposal, it will be declared inadmissible and will not be evaluated.
Overview of the eligibility criteria per action
<table>
<thead>
<tr>
<th>INDIVIDUAL FELLOWSHIPS</th>
<th>EXPERIENCED RESEARCHERS</th>
<th>PARTICIPANTS</th>
<th>DURATION (months)</th>
<th>SCIENTIFIC AREAS</th>
<th>NUMBER OF RANKING LISTS</th>
<th>BUDGET (total €)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nationality</td>
<td>ANY</td>
<td>ANY</td>
<td>MS, AC or long-term residents</td>
<td>ANY</td>
<td>ANY</td>
<td>MS, AC or long-term residents</td>
</tr>
<tr>
<td>Mobility</td>
<td>From ANY country to MS or AC</td>
<td>From ANY country to MS or AC</td>
<td>From TC directly to MS or AC (location of host institution)</td>
<td>From ANY country to MS or AC</td>
<td>From ANY country to TC then to MS/AC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>&lt;= 12 months in the last 3 years</td>
<td>&lt;= 36 months in the last 5 years</td>
<td>&lt;= 36 months in the last 5 years</td>
<td>&lt;= 36 months in the last 5 years</td>
<td>&lt;= 12 months in the last 3 years</td>
<td></td>
</tr>
<tr>
<td>Career break in research</td>
<td>-</td>
<td>at least 12 months within 18 months prior to call deadline</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Beneficiary</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
</tr>
<tr>
<td>Entity with capital or legal link</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
<td>MS or AC</td>
</tr>
<tr>
<td>Partner Organisation</td>
<td>MS or AC (optional secondment)</td>
<td>MS or AC (optional secondment)</td>
<td>MS or AC (optional secondment)</td>
<td>MS or AC (optional secondment, both Academic and Non-Academic)</td>
<td>outgoing phase (mandatory)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>12 to 24</td>
<td>12 to 36</td>
<td>12 to 24</td>
<td>12 to 24</td>
<td>12 to 24</td>
<td>24 to 36 (12 to 24 + 12)</td>
</tr>
<tr>
<td>SCIENTIFIC AREAS</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>NUMBER OF RANKING LISTS</td>
<td>8</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>8</td>
</tr>
<tr>
<td>BUDGET (total €)</td>
<td>€220 million</td>
<td>€8 million</td>
<td>€8 million</td>
<td>€8 million</td>
<td>€45 million</td>
<td></td>
</tr>
</tbody>
</table>
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**Evaluation and Award criteria**
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Who can help you?
<table>
<thead>
<tr>
<th>Excellence</th>
<th>Impact</th>
<th>Quality and Efficiency of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects</td>
<td>Enhancing the future career prospects of the researcher after the fellowship</td>
<td>Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources</td>
</tr>
<tr>
<td>Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host</td>
<td>Quality of the proposed measures to exploit and disseminate the project results</td>
<td>Appropriateness of the management structure and procedures, including risk management</td>
</tr>
<tr>
<td>Quality of the supervision and of the integration in the team/institution</td>
<td>Quality of the proposed measures to communicate the project activities to different target audiences</td>
<td>Appropriateness of the institutional environment (infrastructure)</td>
</tr>
<tr>
<td>Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each criterion will be scored out of 5. **Decimal points will be given.**
0 – Proposal fails to address the criterion and cannot be assessed due to missing or incomplete information.

1 – Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

2 – Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.

3 – Good. The proposal addresses the criterion well, but a number of shortcomings are present.

4 – Very good. Proposal addresses the criterion very well, but a small number of shortcomings are present.

5 – Excellent. Proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.
A weighed total score of the scores of the three individual criteria will be calculated and converted into a percentage of the maximum score.

<table>
<thead>
<tr>
<th>Excellence</th>
<th>Impact</th>
<th>Quality and Efficiency of Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Weighing</td>
<td></td>
</tr>
<tr>
<td>50%</td>
<td>30%</td>
<td>20%</td>
</tr>
</tbody>
</table>

Priority in Case of ex-aquo

An overall threshold of 70% will be applied to the total weighed score. Proposals under the threshold will be rejected.

Prioritization in case of ex-aquo

⇒ if necessary based on other appropriate characteristics that are
  * decided by the panel
  * related to the contribution of the proposal to the European Research Area and/or general objectives mentioned in the Work Programme
⇒ depends on available budget and call conditions
Each proposal is read and evaluated by **three evaluators** in an individual and independent manner. Each evaluator prepares an *individual evaluation report*.

The three evaluators discuss together to reach a **unanimous consensus** on the final comments and score, and prepare a *consensus report*, containing relevant elements from the three individual reports.

The consensus score determines the position on the ranking list.

Applicants receive their *evaluation summary report* (i.e. a copy of the consensus report) in January.

**Full details on the process are available in the Guide for Applicants available on the call page**
IF-2017: Results

IF-2018: Topics, Budget & Planning

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Who can help you?
On this site you can find and secure **funding** for projects under the following EU programmes:

- **2014-2020** Horizon 2020 - research and innovation framework programme
- **2007-2013** 7th research framework programme (FP7) and Competitiveness & Innovation Programme (CIP)

### Non-registered users
- search for funding
- read the H2020 Online Manual & download the legal documents
- check if an organisation is already registered
- contact our support services or check our FAQ

### Registered users
- submit your proposal
- sign the grant
- manage your project throughout its lifecycle
- register as expert advising the Commission
The **Guide for Applicants** is available on the **call page in the Participant Portal**.

You should consider this document as the primary base for any information on how to prepare your proposal and what should be discussed for each (sub)criterion.

**Please follow all instructions closely!**
Proposals must be submitted electronically using the Participant Portal.

**Part A: administrative details**

**Section 1** – General Information

**Section 2** – Administrative data of participating organisations (supervisor(s), researcher)

**Section 3** – Budget: information on the duration (person-months) to calculate the total requested EU contribution.

**Section 4** – Ethics: identifies any ethical aspects of the proposed work. Even if there are no issues, you must simply confirm that none of the ethical issues apply to the proposal.

**Section 5** – Call specific questions request declarations related to eligibility and personal data, together with questions on any secondment in Europe.
The "core" of the proposal – the structure below is mandatory!
!!There is no cover page or table of contents anymore!!

**DOCUMENT 1 (10-PAGE LIMIT APPLIED)**

**START PAGE COUNT**

1. EXCELLENCE
2. IMPACT
3. IMPLEMENTATION

**MAX 10 pages**

**STOP PAGE COUNT**

**DOCUMENT 2 (NO OVERALL PAGE LIMIT APPLIED)**

4. CV OF THE EXPERIENCED RESEARCHER
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
6. ETHICAL ASPECTS
7. LETTERS OF COMMITMENT OF PARTNER ORGANISATIONS (GF only)
Part B is submitted as two separate documents – you will not be able to submit the proposal in the submission system unless both Parts 1 and 2 are provided in pdf format.

Of the maximum 10 pages applied to sections 1, 2 and 3, applicants are free to decide on the allocation of pages between the sections. However, the overall page limit will be strictly applied, excess pages will be blanked out and experts will not be able to read them. It is the responsibility of the applicant to verify that the submitted pdf documents are readable and are within the page limit.
Descriptors (keywords) are chosen by applicants to guide REA in selection of experts and allocation of proposals to the experts.

Applicants select the descriptors in order of importance with 1st being the most important, with a minimum of three and a maximum of five descriptors.

The GfA contains a breakdown of scientific areas into descriptors.

Keep in mind:

- The mandatory first descriptor should best characterise the subject of the proposal, and should be chosen from the area of research chosen for the proposal.
- The mandatory second descriptor should be within the same area of research (e.g.: CHE).
- The mandatory third descriptor can be from any of the eight areas of research.
- Applicants may add two additional descriptors chosen freely from any of the eight areas of research.
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Who can help you?
The Career Restart Panel and the Re-Integration Panels have been **strengthened:**

- The maximum duration for **Career Restart** proposals has been increased from 24 months to **36 months.**

- To increase the success rates for the **Career Restart** and **Re-Integration** panels, a weighting will be applied during the budget distribution. Eligible proposals for Career Restart will have a weighting of 2 times the weighting of the eligible proposals in the other panels. For Re-Integration the weighting will be 1.5 times higher.
Applicants who do not wish to be considered for this funding opportunity can opt out during the application stage.
For recruited researchers with an H2020 MSCA grant having long term physical, mental, intellectual or sensory impairments.

The special needs allowance will take the form of a lump sum awarded in the form of a low value grant to an identified beneficiary and will cover up to 100% of eligible costs.

It will be limited to a maximum of EUR 60,000 per researcher and will be available as of Q1 2019.

For details please refer to the MSCA Work Programme and information available on the Participant Portal.

The IF proposal should NOT contain any information on disabilities (separate grant, separate evaluation).
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Who can help you?
NCP – National Contact Point

Your country → MSCA
H2020 Online Manual

The H2020 Online Manual offers:

- an overview of all steps you need to know for the electronic management of proposals or grants;
- easy navigation by process steps;
- a brief descriptions on how to complete your tasks.

Links and references to:

- Guidance notes, templates
- User manuals of the relevant tools
- Frequently asked questions
Thank you for your attention!

Nothing in life is to be feared just understood.
- Marie Curie