MARIE SKŁODOWSKA-CURIE ACTIONS

Individual Fellowships (IF)

Ilse DE WAELE
Call Coordinator
Research Executive Agency

29 May 2017
Brussels
MSCA in H2020

**IF**
Individual Fellowships

**ITN**
Innovative Training Networks

**RISE**
Research and Innovation Staff Exchange

**COFUND**
Co-funding of regional, national and international programmes
IF 2016 results

IF-2016

8829 evaluated proposals

1188 funded proposals

MSCA-IF-EF-CAR
MSCA-IF-EF-RI
MSCA-IF-EF-SE
MSCA-IF-EF-ST
MSCA-IF-GF
IF 2017: Topics & Budget

EF
European Fellowships

GF
Global Fellowships

215 M€

33.7M

Call Opening: 11 April 2017
Call Deadline: 14 September 2017, 17:00:00 CET
Evaluation: October – November 2017
Launch Grant preparation: January 2018

held in EU Member States or Associated Countries

based on an outgoing phase to a third country and a return phase in MS/AC
What are IFs?

- Individual trans-national fellowships to the best and most promising experienced* researchers
  (* 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
For fellows coming to or moving within Europe (duration 12-24 months)

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

Total duration 24/36 months

An Experienced Researcher may submit only one proposal to this call for proposals.
1. Member States (MS) – 28 countries
   - Iceland
   - Norway
   - Albania
   - Bosnia and Herzegovina
   - former Yugoslav Republic of Macedonia
   - Montenegro
   - Serbia
   - Turkey
   - Israel
   - Moldova
   - Switzerland
   - Faroe Islands
   - Ukraine
   - Tunisia
   - Georgia
   - Armenia

2. Associated Countries (AC)

3. Third Countries (TC): any other country

NEW!
EU Validation Services ultimately determine the sector of every participating organisation.

### 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

**Sectors**
- Universities
- Non-profit research institutes
- IEIOs
- Industry
- SMEs
- Other socio-economic actors
A project is:
- written by the experienced researcher
- a concrete plan of training-through-research
- the host organisation’s premises
- under the direct supervision of the Supervisor(s)

Realistic and well-defined objectives in terms of career advancement or 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
## MSCA IF Financial Aspects

<table>
<thead>
<tr>
<th></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>Individual Fellowships</td>
<td>4 650</td>
<td>600</td>
</tr>
</tbody>
</table>

*adjusted through the application of a country correction coefficient*
A transfer of knowledge which contributes significantly to the impact of the fellowship.

- Secondment 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 Europe
- Can be to an institution in the same country as the beneficiary
- Can be in the same sector
- No letter of commitment needed
- Is different from short visit (e.g. field work), which can be done in a TC
- Special rule for Global Fellowships in duly justified cases

<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>
An experienced researcher applies with one host institution for a research project that can last between 12 and 24 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 (contract of employment)

**Researcher (future Fellow)**

- Must undertake transnational mobility
- Can be of any nationality (*with the exception of the Re-Integration panel*)
EF - Standard

- 8 panels
- Not spent +1 year in past 3 years in host country

Map showing "Intra EU" and "Incoming" with a clock indicating time spent.
One multidisciplinary panel

EF – Career Restart Panel

Not spent +3 year in past 5 years in host country

Not active in research during past year

Incoming

Intra EU
Definition of **career break in research:**

**not have been active in research** for at least 12 months immediately prior to the deadline for submission of proposals (15/09/16 to 14/09/17).

**Active in research:** determined on the basis of

- A. fellowships in research domain or
- B. employment contracts in research domain

The **professional status** should be clearly explained in the proposal, both in part A and B:

- e.g. unemployment, parental/sick leave, no fellowship/employment contract in research
One multidisciplinary panel

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

Not spent +3 year in past 5 years in host country

Researchers left EU

Researchers now returns to EU

No minimum time spent outside EU
One multidisciplinary panel

Not spent +3 year in past 5 years in host country

Non academic sector only

EF – Society & Entreprise Panel
Beneficiary only **from non-academic sector:**
- from industry to business (including SMEs),
- government,
- civil society organisations (NGOs, trusts, foundations, etc.),
- cultural institutions and museums,
- hospitals,
- international organisations (like the UN or WHO), etc.

**Mobility rule** is to not have spent more than 3 years in the last 5 years in the country of the beneficiary

Earmarked budget of **10 million €**
One experienced researcher applies with one 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 (contract of employment)
Partner Organisation

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

- **DOES NOT** sign the Grant Agreement
- **DOES NOT** recruit the researcher
- **DOES NOT** claim costs directly from the action
Global Fellowships – Letter of Commitment

!!!!!!!! Document needed only for Global Fellowships !!!!!!!

- no specific template
- has heading or stamp from the partner organisation
- is up-to-date (i.e. issued after the call publication, 11 April 2017)
- the text must demonstrate the will to actively participate in the proposed action and the precise role
- is signed by the legal representative of the partner organisation
Global Fellowships

Researcher (future Fellow)

Mobility: from ANY country to the partner organisation in the Third Country

Mobility rule: not 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

! Under the direct supervision of two Supervisors.

### Duration

<table>
<thead>
<tr>
<th>Phase GF</th>
<th>Duration (months)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Outgoing to TC</td>
<td>12 - 24</td>
</tr>
<tr>
<td>2. Return to MS or AC</td>
<td><strong>12</strong> (mandatory)</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>24 - 36</strong></td>
</tr>
</tbody>
</table>
Global Fellowships

- Not spent +1 year in past 3 years in host country
- If not European, researcher must have spent at least 5 years in Europe before leaving (long term residency)

8 panels

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

Phase 1: Researcher returns outside of EU (up to 24 months)

Phase 2: Researcher returns to EU (12 months)
<table>
<thead>
<tr>
<th><strong>INDIVIDUAL FELLOWSHIPS</strong></th>
<th><strong>EUROPEAN</strong></th>
<th><strong>GLOBAL</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NATIONALITY</strong></td>
<td>ANY</td>
<td>ANY</td>
</tr>
<tr>
<td><strong>Mobility</strong></td>
<td>From ANY country to MS or AC</td>
<td>From ANY country to MS or AC</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>
</tr>
</tbody>
</table>
| Career break in research  | -            | ≥ 12 mm before 14/09/17 | -          | -
| **Beneficiary**           | MS or AC     | MS or AC   | MS or AC Non-academic only | MS or AC |
| Entity with capital or legal link | MS or AC | MS or AC | MS or AC Non-academic only | MS or AC |
| **Partner Organisation**  | MS or AC (optional secondments) | MS or AC (optional secondments) | MS or AC (optional secondments) | MS or AC (optional secondments) |
| **DURATION (months)**     | 12 / 24      | 12 / 24    | 12 / 24    | 12 / 24 |
|                           | 24 / 36 (12/24 + 12) |   |   | |
| **SCIENTIFIC PANELS/AREAS** | 8 panels    | 8 areas    | 8 areas    | 8 areas |
| **NUMBER OF RANKING LISTS** | 8           | 1          | 1          | 1 |
| **BUDGET (total € 218.5 million)** | 205 million | €10 million | €33.70 million |
MARIE SKŁODOWSKA-CURIE ACTIONS

Evaluation Criteria and IF proposals
### Evaluation Criteria

<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 potential and future career prospects of the researcher</td>
<td>Coherence and effectiveness of the work plan</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 allocation of tasks and resources</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 management structure and procedures, including risk management</td>
</tr>
<tr>
<td>Capacity of the researcher to reach or re-enforce a position of professional maturity/independence</td>
<td></td>
<td>Appropriateness of the institutional environment (infrastructure)</td>
</tr>
</tbody>
</table>

Each criterion will be scored out of 5. Decimal points may be given.
## Award Criteria

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

**Priority in Case of Ex Aequo**

| 1 | 2 | 3 |

The total score is weighted, the maximum is 100.

An overall threshold of 70% will be applied to the total weighted score.

- **Further Prioritization**
  - 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
Proposals: submitted exclusively 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

**DOCUMENT 1 (13-PAGE LIMIT APPLIED)**

START PAGE (1 page)

LIST OF PARTICIPATING ORGANISATIONS

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

1. EXCELLENCE  
2. IMPACT  
3. IMPLEMENTATION

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

**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 (only for GF)
Descriptors

Chosen by applicants to guide REA in selection of experts and allocation of proposals to the experts.

Number of descriptors ranges from 3 to 5. Applicants select the descriptors in order of importance with 1st being the most important.

Annex 6 of the GfA contains a breakdown of scientific areas into descriptors. The list has been updated to better reflect the scientific domains.

Applicants must:

1) Select one of the 5 types of fellowship (EF-ST, EF-CAR, EF-RI, EF-SE, GF)

2) Select the area of research (e.g.: CHE), i.e. the core discipline of the proposal

3) Within the most relevant sub-area of research (e.g.: C1-Synthetic Chemistry and Materials), select the first descriptor that best characterises the subject of the proposal

4) Select the second descriptor within the same area of research (e.g.: CHE)

5) Third descriptor: from any of the eight (8) areas of research is mandatory.

6) If needed applicants may add further two (2) additional descriptors chosen freely.
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