MARIE SKŁODOWSKA-CURIE ACTIONS

Individual Fellowships (IF)

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European Commission
Research Executive Agency

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IF-2019: Topics, Budget & Planning

Individual Fellowships – key concepts

European Fellowships

Global Fellowships

Submission of Proposals

Evaluation and Award criteria

IF-2018: Results

Who can help you?

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IF-2019: Topics & Budget

EF

European Fellowships

held in EU Member States or Associated Countries

244.49 M€

GF

Global Fellowships

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

50 M€

Call Opening:	**11 April 2019**
Call Deadline:	**11 September 2019, 17:00:00 CET**
Evaluation:	**October – December 2019**
Launch Grant preparation:	**January 2020**

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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)

European Fellowships			
Standard (ST)	Career Restart Panel (CAR)	Re-integration Panel (RI)	Society & Enterprise Panel (SE)

Global Fellowships

✓ **Secondments** of 3 – 6 months in Europe (MS or AC), for greater impact

✓ Specific eligibility criteria

✓ Career development with an appropriate **inter-sectoral** dimension

What are Individual Fellowships?

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A researcher may submit only **one** proposal to this call for proposals.

European Fellowships

For fellows coming to or moving within Europe
duration 12-36 months for CAR
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

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Which countries?

Member States (MS)

Associated Countries (AC):

Iceland, Norway, Albania, Bosnia and Herzegovina, North 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 establishments** awarding academic degrees

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

International **European interest** organisations

- Universities
- Non-profit research institutes
- IEIOs

Non-academic

Broad definition:

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

- Industry
- SMEs
- Other socio-economic actors

EU Validation Services ultimately determine the sector of each participating organisation

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What is a "Project"?

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** for **career advancement** or for **resuming research career after a break**.

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Typical training activities may include:

- **training-through-research**: individual personalised action
- **Hands-on training activities** for developing **scientific** (new techniques, instruments) and **transferable skills** (supervising & monitoring, grant proposal preparation, IPR management, 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

What is the financial contribution?

	Researcher unit cost in EUR person/month			Institutional unit cost in EUR person/month	
	Living Allowance*	Mobility Allowance	Family Allowance	Research, training and networking costs	Management and indirect costs
Individual Fellowships	4,880	600	500	800	650

*adjusted through the application of a **country correction coefficient (GR = 88.7%)**

NOTE:

*The living allowance is a **gross EU contribution** to the salary costs of the researcher. Consequently, the net salary results from deducting all compulsory (employer/employee) social security contributions as well as direct taxes (e.g. income tax) from the gross amounts. The host beneficiary **may pay a top-up** to the eligible researchers from another budget source in order to complement this contribution.*

*The rate indicated above is for researchers devoting themselves to their action on a **full-time basis**.*

What are secondments?

Transfer of knowledge which contributes significantly to the impact of the fellowship

Fellowship Duration	Maximum duration of secondment
≤ **18** months	**3** months
> **18** months	**6** months

- 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.

> 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)

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

- Location: MS or AC
- Sector: Academic or Non-academic
- Can be International European Interest Organisation (IEIO)
- 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)

EF – Standard

8 panels

CHE
SOC
ECO
ENG
ENV
LIF
MAT
PHY
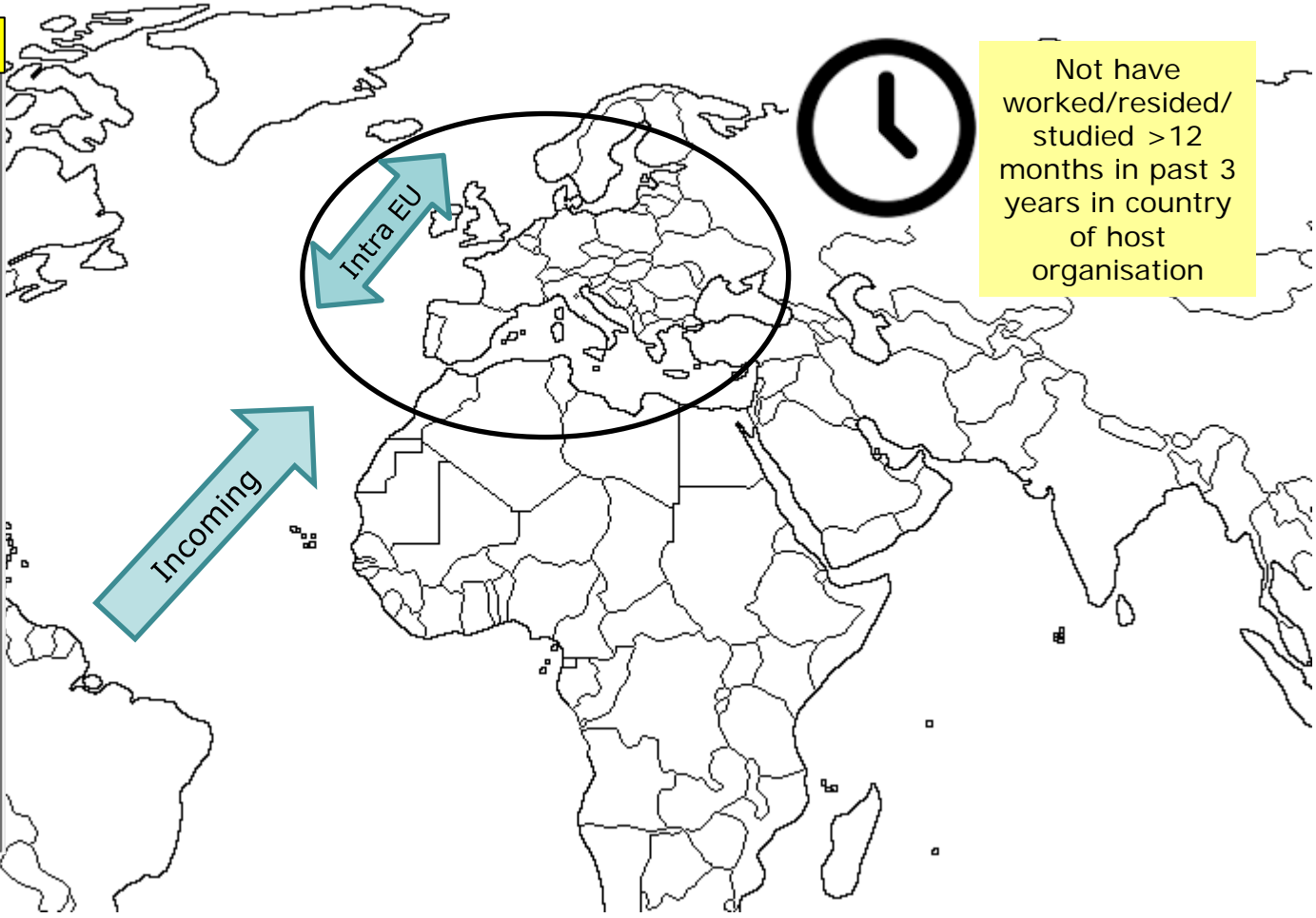
Intra EU

Incoming

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

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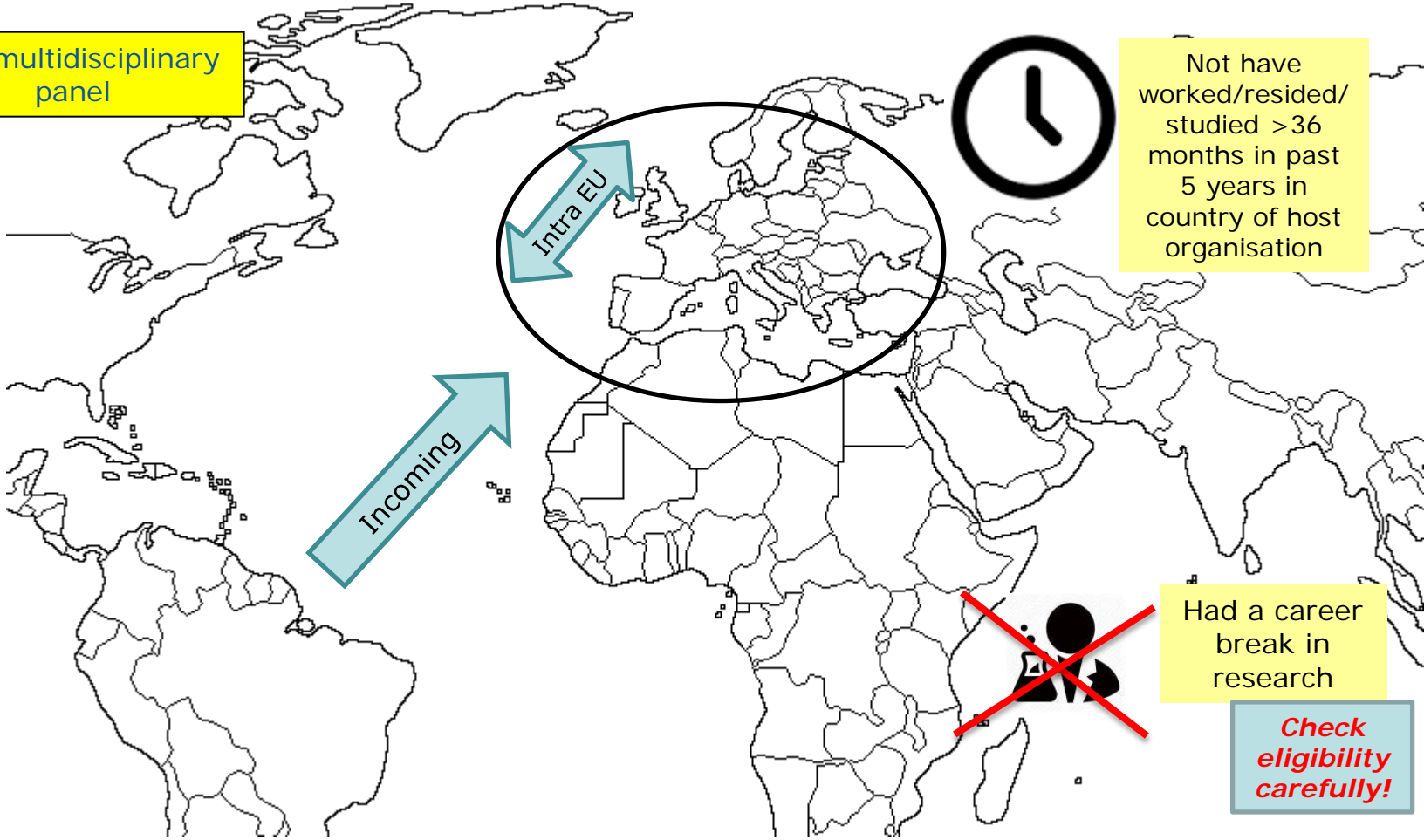
Not have worked/resided/ studied >36 months in past 5 years in country of host organisation

Intra EU

Incoming

Had a career break in research

Check eligibility carefully!

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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.

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*

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One multidisciplinary panel
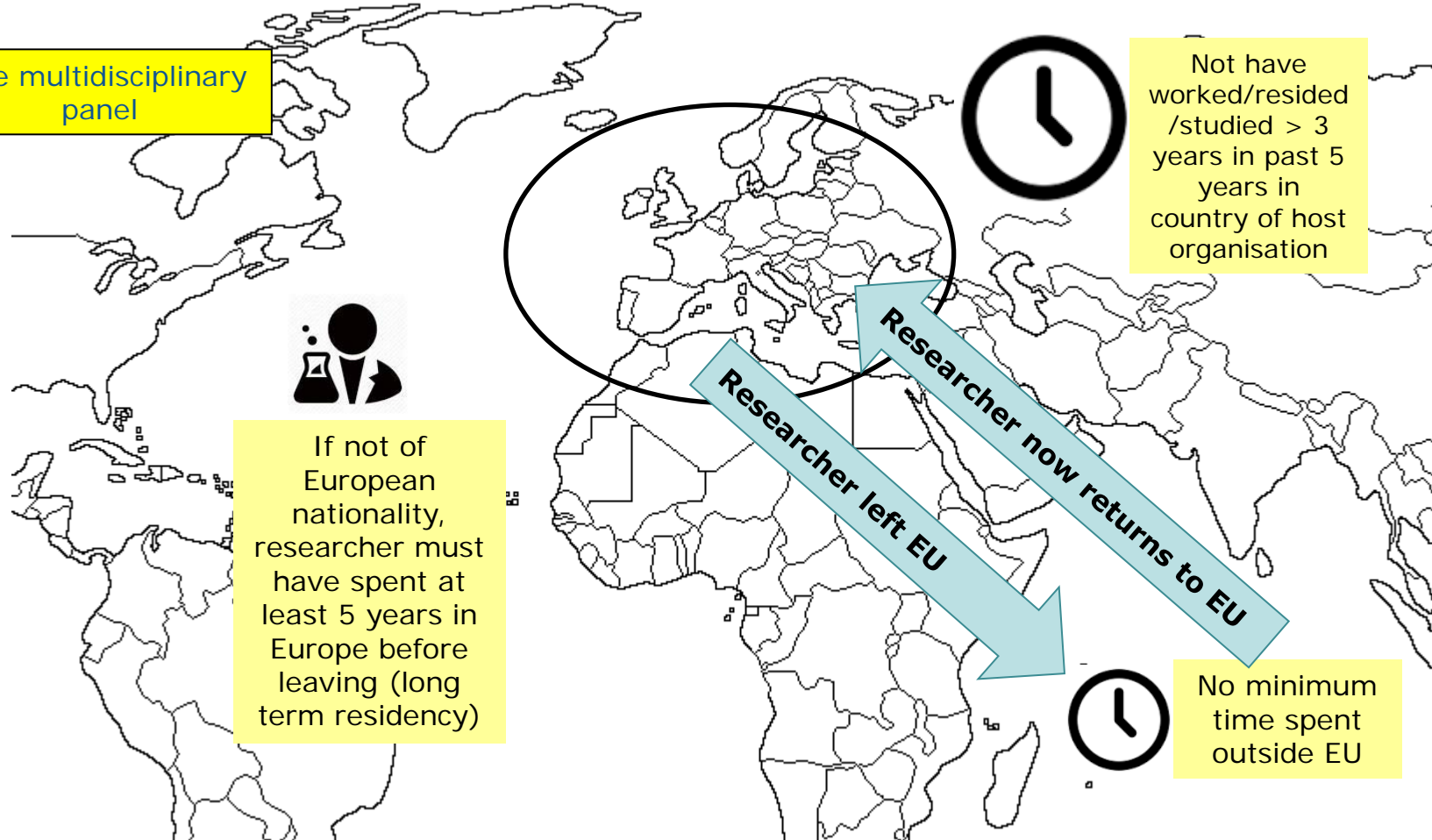
Not have worked/resided /studied > 3 years in past 5 years in country of host organisation

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

Researcher now returns to EU

Researcher left EU

No minimum time spent outside EU

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One multidisciplinary panel

Intra EU

Incoming

Not have worked/resided/ studied >3 years in past 5 years in country of host organisation

Non-academic sector only

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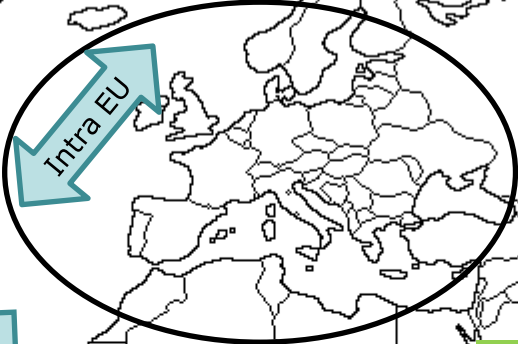
Beneficiary **from the non-academic sector only:**

- industry and business (including SMEs)

- government

- civil society organisations (NGOs, trusts, foundations, etc.)

- cultural institutions and museums

- hospitals

- international organisations

__ONLY APPLY FOR THIS PANEL WHEN CERTAIN FUTURE HOST IS__

__NON-ACADEMIC__

Estimated budget of 8 million €

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 in a Third Country + 12 months of mandatory return phase in MS/AC)

Host Institution (future Beneficiary)

Same as in EF!

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

Partner Organisation

<div style="color:red">*Different from EF!*</div>

- 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

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Researcher (future Fellow)

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

- Must undertake mobility from ANY country to the partner organisation in the Third Country. The researcher cannot have spent more than 12 months in the last 3 years in the Third Country of the partner organisation

- Will be under the direct supervision of two Supervisors

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8 panels

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

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

Phase 2 - Researcher returns to EU (12 months)

Phase 1 – outside of EU (up to 24 months)

If not of European nationality, researcher must have spent at least 5 years in Europe before leaving (long tern residency)
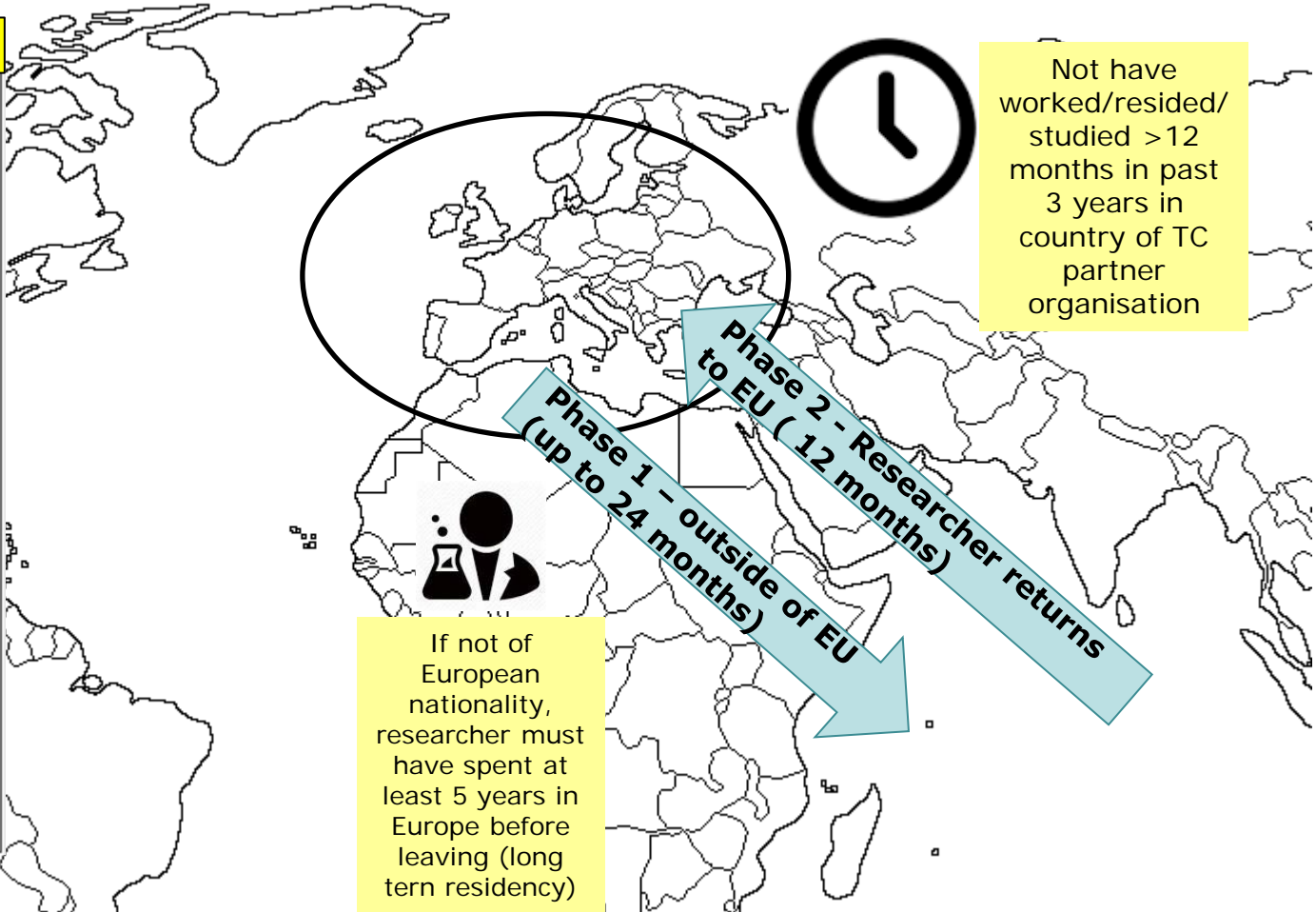
!!!!!!!!   _Document needed <u>only for Global Fellowships</u>_   !!!!!!!!

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, 11 April 2019)

- 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

INDIVIDUAL FELLOWSHIPS		EUROPEAN				GLOBAL
		ST	CAR	RI	SE	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	ANY	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC directly to MS or AC (location of host institution)	From ANY country to MS or AC	From ANY country to TC then to MS/AC
		<= 12 months in the last 3 years	<= 36 months in the last 5 years	<= 36 months in the last 5 years	<= 36 months in the last 5 years	<= 12 months in the last 3 years
	Career break in research	-	at least 12 months within 18 months prior to call deadline	-	-	-
PARTICIPANTS	Beneficiary	MS or AC	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	MS or AC Non-academic only	MS or AC
	Partner Organisation	MS or AC (optional secondment)	MS or AC (optional secondment)	MS or AC (optional secondment)	MS or AC (optional secondment, both Academic and Non-Academic)	outgoing phase (mandatory) TC · MS or AC (optional secondment)
DURATION (months)		12 to 24	12 to 36	12 to 24	12 to 24	24 to 36 (12 to 24 + 12)
SCIENTIFIC AREAS		8	8	8	8	8
NUMBER OF RANKING LISTS		8	1	1	1	8
BUDGET (total € 218.5 million)		€236,49 million			€8 million	€ 50 million

European Fellowships ONLY where the Beneficiary is located in:

Member States (MS): Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia

Associated Countries (AC): Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, North Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine

BUDGET 2019: EUR 6 Million

Applicants who wish to be considered for this additional funding opportunity **should opt in during the application stage**.

* Opting in, or out, is a fixed decision and cannot be modified at a later stage!

Participant Portal- FTOP

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The **Guide for Applicants** is available on the call page in the Portal.

This document is the primary information source on how to prepare your proposal.

Please follow all instructions closely, and do not refer to the Guide from a previous call!

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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
!!DO NOT ADD ANY PAGES AT THE START OF DOCUMENT 1!!

DOCUMENT 1 (10-PAGE LIMIT APPLIED)

START PAGE COUNT

1.   EXCELLENCE

2.   IMPACT   MAX 10 pages

3.   IMPLEMENTATION

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)

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Proposal Part B

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 automatically applied, and <u>excess pages will be blanked out and are irrevocably lost</u>. It is the responsibility of the applicant to verify that the submitted pdf documents are readable and are within the page limit.

Descriptors

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.

- Each proposal is read and evaluated indipendently by **three evaluators** who prepare 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

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Evaluation & Award Criteria

Excellence	Impact	Quality and Efficiency of Implementation
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the future career prospects of the researcher after the fellowship	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
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 management structure and procedures, including risk management
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 institutional environment (infrastructure)
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship		

Each criterion will be scored out of 5. Decimal points will be given.

Evaluation & Award Criteria

A weighed total score of the scores of the three individual criteria will be calculated and converted into a percentage of the maximum score.

Excellence	Impact	Quality and Efficiency of Implementation
Weighing		
50%	30%	20%
Priority in Case of ex-aequo		
1	2	3
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-aequo

→ 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

IF 2018
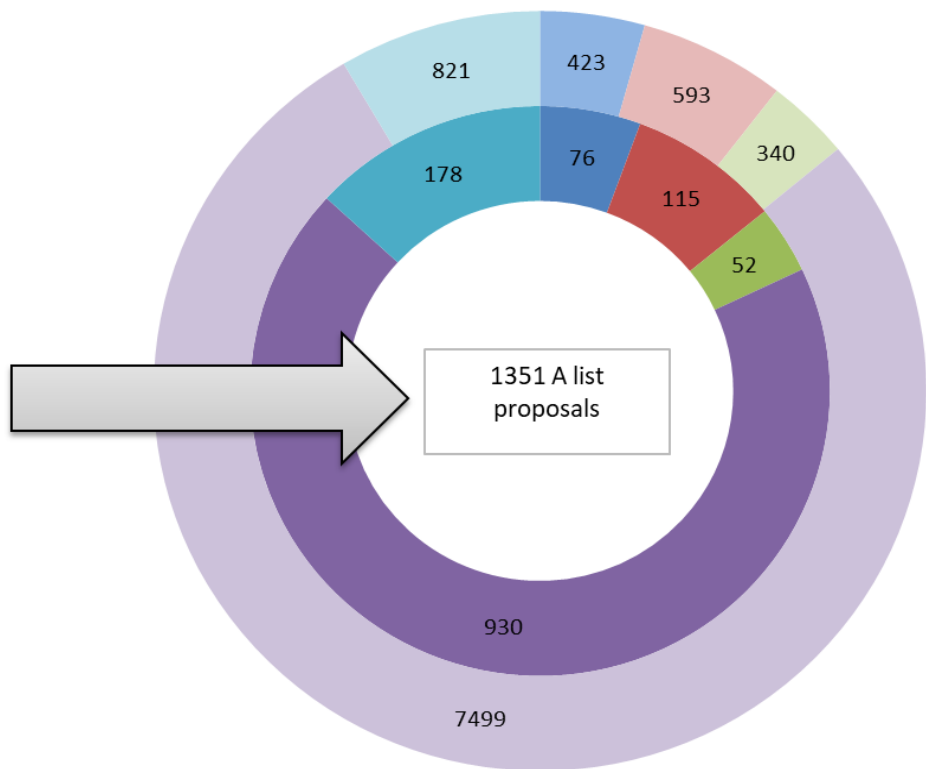
9676 evaluated proposals → 1351 A list proposals

Legend: MSCA-IF-EF-CAR, MSCA-IF-EF-RI, MSCA-IF-EF-SE, MSCA-IF-EF-ST, MSCA-IF-GF

Values shown: 423, 593, 340, 76, 115, 52, 178, 821, 930, 7499

NCP – National Contact Point

Your country ⟹   MSCA ⟸

H2020 Manual

...like the Guide for Applicants

Thank you for your attention!

Nothing in life is to be feared just understood.

- Marie Curie