

Marie Skłodowska-Curie Actions: Individual Fellowships (IFs)

Q & A Session, 23 June 2015

Deadline for applications: 10 September 2015

Who is Eligible for Horizon2020 Funding?

EU-28: Austria, Belgium, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Italy, Ireland, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, UK

Associated Countries: Switzerland (partly until 2017), Israel, Norway, Iceland, Turkey, FYROM, Serbia, Albania, Montenegro, Bosnia & Herzegovina, Faroe Islands, Moldova, Ukraine

Other Third Countries (funding depends on their income status):
http://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/annexes/h2020-wp1415-annex-ga_en.pdf

Note: Brazil, Russia, India, China and Mexico are no longer eligible for funding

European Commission's Horizon 2020 Programme

“Exiting the economic crisis through sustainable growth”

Excellent Science

European Research Council (ERC)

Future and Emerging Technologies (FETs)

Marie Skłodowska-Curie Actions

Research Infrastructures

Industrial Leadership

Leadership in Enabling and Industrial Technologies (LEIT) – ICT KETs, Space

Access to Risk Finance

Innovation in SMEs

Grand Societal Challenges

Health and Well-being

Food Security

Transport

Energy

Climate

Societies

Security

Widening Participation, Science with and for Society

European Institute of Innovation and Technology (EIT)

EURATOM

Joint Research Centre

‘Excellent Science’ Pillar...

- **30% of total Horizon 2020 budget**
- **Overall objective “to strengthen the excellence of European research”, with the aim to:**
 - **Attract and retain high potential individuals**
 - **Fund the most talented, creative and ambitious researchers**
 - **Forward new research and ideas as drivers of competition**
 - **Develop and maintain world-class research infrastructures**

Marie Skłodowska-Curie Actions

MSCAs operate on a completely bottom-up basis, with no pre-defined priority areas.

They emphasise international and inter-sectoral mobility, and have a strong focus on training, careers and (innovation) skills development for researchers, and on the exchange & transfer of knowledge.

Some of the schemes within the MSCA are aimed at individual researchers; others are aimed at institutions.

MSCAs are made up of 4 funding schemes:

- Innovative Training Networks (ITN)
- **Individual Fellowships (IF)**
- Research and Innovation Staff Exchange (RISE)
- Co-funding of Regional, National & International Programmes (COFUND)

Individual Fellowships: Standard European Fellowships (IF-EF)

<http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/h2020/topics/10057-msca-if-2015-ef.html>

Purpose: to allow an Experienced Researcher (who holds a doctoral degree or has 4 years of full-time research experience) to pursue a research project for 12-24 months. They are held at institutions in EU Member States and are open to researchers either coming to Europe or moving within Europe.

Who: there are no nationality, age or career stage restrictions

Mobility & eligibility rule: applicants must not have resided nor carried out their main activity in the country of their host organisation for more than 12 months in the 3 years prior to the deadline.

What: the main 'training' activities are likely to be:

- **'training-through-research' at host institution under the direct supervision of a named Host Supervisor according to an individual, personalised concrete action plan for the duration of the Fellowship**
- **working to realistic and well-defined objectives in terms of research project and career advancement (a Career Development Plan needed, if successful)**
- **The project should be shaped in order to significantly develop and widen the competences of the researcher, in terms of their multi or inter-disciplinary expertise, inter-sectoral experience, and transferrable skills (through secondments)**
- **Planning for publications, participation in conferences**
- **Public engagement activities, outreach activities with horizontal skills**
- **Scientific dissemination and training events**
- **Optional secondment (should significantly add to the research project) of up to 3-6 months – knowledge transfer**
- **Training regarding gender issues**

Standard European Fellowship (IF-EF) applicants can submit their proposals to one of the 8 main evaluation panels

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

http://ec.europa.eu/research/participants/portal/doc/call/h2020/h2020-msca-if-2015/1645174-if_descriptors_2015_en.pdf

There are 2 further multidisciplinary panels: Career Restart Panel (CAR) and Reintegration Panel (RI).

The CAR panel provides financial support to individual researchers who want to resume research in Europe after a career break, while the RI panel is dedicated to researchers who want to return to Europe to reintegrate in a longer term research position.

Mobility & eligibility rule: applicants must not have resided nor carried out their main activity in the country of their host organisation for than 36 months in the 3 years prior to the deadline. Other rules apply.

Individual Fellowship: Global Fellowship (IF-GF)

Purpose: for Experienced Researchers to conduct a 'training-through-research' project for 12-24 months at a partner organisation in a Third Country (outgoing phase), and a mandatory 12-month return period to a host organisation in Europe (incoming phase).

Who: applicants must be nationals of an EU member state or associated country. However, third country nationals are eligible if they have worked in a member state or associated country for a minimum of 5 years prior to the deadline.

Mobility: applicants must not have resided nor carried out their main activity in the Third Country where the initial outgoing phase takes place for more than 12 months in the 3 years prior to the deadline.

What: An IF-GF is again based on advanced training & should significantly widen the researcher's skill set/competences, through the completion of a predefined research project. The project must necessitate the mobility proposed for its successful completion.

ALL IF-GF proposals are allocated to one of the 8 scientific panels, as per the Standard European Fellowships. Each panel then has a separate rank listing.

Notes: Letter of Commitment from TC needed. If the fellow does not complete the return phase, the host organisation will have to reimburse the total amount.

For Individual Fellowships overall:

Deadline: 10 September 2015, 17:00 Brussels local time
Indicative budget: EUR 215 million (with EUR 27 million for IF-GFs)
Evaluation of proposals: October-November 2015
Outcome of evaluation: February 2016
Earliest start date: May/June 2016

- **Proposals for IFs involve a single host institution (future beneficiary) established in an EU Member State or Associated Country**
- **Project proposals should be prepared by the Experienced Researcher in liaison with the host organisation, which is represented by the supervisor**
- **The Experienced Researcher and Host Supervisor must be two different people**
- **Submission of the proposal falls under the full responsibility of the Host Supervisor**
- **Only one proposal per researcher can be submitted**
- **Ethical considerations and gender issues are important.**

Financials (in EUR)

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

	Researcher unit cost [person/month]			Institutional unit cost [person/month]	
	Living allowance (monthly instalments, gross)	Mobility allowance	Family allowance (if relevant)	Research, training & networking costs (managed by beneficiary)	Management & overheads (to the beneficiary)
Individual Fellowships	4 650	600	500	800	650

How to Apply?

- Electronic submission (1-stage) using the EC's Online Submission Service (SEP) available via the **Participant Portal**
- Each upload replaces the last and so the very final version is assessed → sign up early !

Part A: Administrative Forms – general information including abstract; data on participants and contacts; budget; ethical issues table; call specific questions

Part B: Proposal

- List of Participants

- Excellence
- Impact
- Implementation



10 PAGES MAXIMUM

- CV of the Experienced Researcher
- Capacities of the Participating Organisations
- Ethical Aspects
- Letter of Commitment of Partner Organisation (for TC in IF-GF applications only)

Evaluation?

- At least 3 evaluators, each producing an individual report
- Through Consensus Meetings in Brussels, Consensus reports are produced and comments/scores are agreed
- Proposals are ranked by panel, and placed in priority order for funding
- Evaluation Summary Reports (ESRs) are provided as feedback to applicants along with score and funding decisions
- No restrictions on reapplication, but do not refer to previous attempts
- Part B of the application form reflects the Evaluation Criteria – treat each one as an exam question
- Each criterion scored between 0-5, with decimal points possible.

Assessment Criteria - mirrors structure of proposal outline; deliberately indicate how each criterion is approached, draw on same terminology to do so.

Excellence	Impact	Implementation
1.1 Quality, innovative aspects and credibility of the research (including inter/multidisciplinary aspects)	2.1 Enhancing research- and innovation-related human resources, skills and working conditions to realise the potential of individuals and to provide new career perspectives	3.1 Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
1.2 Clarity and quality of transfer of knowledge/training for the development of researcher in light of the research objectives	2.2 Effectiveness of the proposed measures for communication and results dissemination	3.2 Appropriateness of the management structures and procedures, including quality management and risk management
1.3 Quality of the supervision and the hosting arrangements		3.3 Appropriateness of the institutional environment (infrastructure)
1.4 Capacity of the researcher to reach or re-enforce a position of professional maturity in research		3.4 Competences, experience and complementarity of the participating organisations and institutional commitment
Weighting		
50%	30%	20%
Priority in case of <i>ex aequo</i>		
1	2	3

CV of the Experienced Researcher

- The CV is intrinsic to the evaluation of the whole proposal and is assessed throughout the 3 evaluation criteria.
- This section = maximum 5 pages and should include **the standard academic and research record. Explain any research gaps.**

The *Experienced Researcher's* list of achievements reflecting their track record might include:

1. **Publications in peer-reviewed scientific journals, peer-reviewed conference proceedings and/or monographs** of their respective research fields, indicating also the number of citations (excluding self-citations) they have attracted.
2. **Granted patent(s).**
3. **Research monographs, chapters** in collective volumes and any translations thereof.
4. **Invited presentations** to peer-reviewed, internationally established conferences and/or international advanced schools.
5. **Research expeditions** that the *Experienced Researcher* has led.
6. **Organisation of International conferences** in the field of the applicant (membership in the steering and/or programme committee).
7. **Examples of participation in industrial innovation.**
8. **Prizes and Awards.**
9. Funding received so far
10. Supervising, mentoring activities.

Capacity of the Participating Organisations

- Complete one table of maximum one page per institution, beneficiary or partner organisation.

Beneficiary X	
General Description	
Role and Commitment of key persons (supervisor)	<i>(names, title, qualifications of the supervisor)</i>
Key Research Facilities, Infrastructure and Equipment	<i>Demonstrate that the team has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to recruited Experienced Researcher</i>
Independent research premises?	<i>Please explain the status of the beneficiary's research facilities – i.e. are they owned by the beneficiary or rented by it? Are its research premises wholly independent from other beneficiaries and/or partner organisations in the consortium?</i>
Previous Involvement in Research and Training Programmes	<i>Detail any relevant EU, national or international research and training projects in which the beneficiary has previously participated</i>
Current involvement in Research and Training Programmes	<i>Detail the EU and/or national research and training actions in which the partner is currently participating</i>
Relevant Publications and/or research/innovation products	<i>(Max 5) Produced by the organisation, not limited to the supervisor within the organisation.</i>

- This information should not be copied and pasted from the University's/Department's website

It is important to remember the added value of Cambridge

- Availability of peer support, academic talks, social and professional networking and associations via faculty, CRASSH and College links
- For non-academic potential make use of the proximity of world-class museums, Cambridge Assessment, and Cambridge Enterprise for links with local industry
- Personal and Professional Development for a wide range of available training courses (both academic and non-academic - <http://www.training.cam.ac.uk/cppd/theme>)
- An expert Public Engagement Team ready to advise on training, opportunities and events related to public engagement: <http://www.cam.ac.uk/public-engagement>. See especially The Festival of Ideas: <http://www.festivalofideas.cam.ac.uk/>

Expected impact of Individual Fellowships:

- Individual Fellowships are expected to add significantly to the development of the best and most promising researchers active in Europe, in order to enhance and maximise their contribution to the knowledge-based economy and society.
- The action will also strengthen the contact network of both the researcher and the host organisation.
- The fellowship will contribute to realising the full potential of researchers and to catalysing significant development in their careers in both the academic and non-academic sectors.
- Some researchers will be resuming a research career in Europe after a break, or reintegrating within Europe after living abroad.

http://ec.europa.eu/research/participants/data/ref/h2020/wp/2014_2015/main/h2020-wp1415-msca_en.pdf

Tips for a successful proposal

- Demonstrate how the excellence of your project goals and yourself as an Experience Researcher make you the best in Europe. This includes providing details of your major achievements so far (not necessarily publications, but can so-far-unpublished key subject-changing results from your PhD, for example. Or, if you have been part of a team which has made a significant discovery describe your role in that team).
- Explain the contribution to science your project is expected to make. What gaps does it fill, how is it innovative and original? Sketch out the state-of-the-art and show clearly how your project adds to or disrupts this.
- Demonstrate the expertise of the host institution as well as the expertise of the host supervisor to the field of research you want to explore. Ask host for assistance with this.
- Consider the impact of the project – what are the benefit that will be gained from undertaking the project at the Community level and how it will contribute to enhance the European scientific excellence? How will this project contribute to your own career?
- If applying for an IF-GF, describe the ways in which you, the European Research Area and the European Scientific community will benefit from the knowledge which you have gained while working in the Third Country.

- **Research and technological quality, including any interdisciplinary and multidisciplinary aspects; appropriateness of research methodology and approach, use work packages to organise schedule of work, be very clear on feasibility; originality and innovative nature of the project and relationship to the 'state of the art'; timeliness and relevance of the project.**
- **Training: clarity and quality of the training objectives for the researcher; relevance and quality of additional research training as well as of transferable skills offered; measures taken by the host for providing quantitative and qualitative mentoring/tutoring to account for these undertakings.**
- **Researcher: research experience; research results including patents, publications, teaching etc.; independent thinking and leadership qualities; match between the fellow's profile, project and host supervisor and department; potential for reaching or reinforcing a position of professional maturity; potential to acquire new knowledge.**
- **As training researchers on gender issues serves the policy objectives of Horizon 2020 and is necessary for the implementation of R&I actions, applicants may include in their proposals such activity.**



**If you would like to discuss your application on an individual basis, please do contact Andrea Salter to arrange a meeting:
acs87@cam.ac.uk**