

# Net4Mobility<sup>+</sup>



## Net4Mobility+

Network of the Marie Skłodowska-Curie Actions National Contact Points for the mobile scientific and innovation community

### Deliverable No. 3.2

## MSCA-Individual Fellowship Handbook 2019

Issued by: Geraldine Canny & Chiara Loda, Irish Universities Association, IE

Issued date: 13 June 2019

Work Package Leader: ISERD, IL



N4M+ project has received funding from the European Union's Horizon 2020 research and innovation programme under the grant agreement No 785632

**Table of Contents**

**Disclaimer**..... 3

**MSCA-Individual Fellowship 2019 Essentials**..... 4

**Key tips for the proposal template and layout**..... 6

**How to use the MSCA-IF Handbook** ..... 7

**Part B-1**..... 8

**1. Excellence** ..... 9

**2. Impact**..... 20

**3. Quality and Efficiency of the Implementation**..... 25

**Part B-2**..... 32

**Part B-2 Section 4 - CV of the experienced researcher**..... 33

**Part B-2 Section 5 - Capacity of the Participating Organisations** ..... 35

**Part B-2 Section 6 - Ethical Issues**..... 38

**Part B-2 Section 7 - Letter of commitment (GF only)** ..... 42

**Disclaimer**

**This is an UNOFFICIAL document prepared by the Irish Marie Skłodowska-Curie Office (IMSCO), under the EU-funded Project “Net4Mobility+”.**

- The information contained in this document is intended to assist and support researchers submitting a Proposal for the Individual Fellowships (IF) Call for the deadline 11/09/2019. It is therefore NOT a substitute of European Commission Documents, which in all cases must be considered as official and binding.
- It should be noted that this document is susceptible to data corruption, unauthorised amendment and interception by unauthorised third parties for which we accept no liability. All reasonable precautions have been taken to ensure that this document neither contains nor transmits any viruses and we recommend that you ensure that your anti-virus programmes and procedures are up to date.

**MSCA-Individual Fellowship 2019 Essentials**

Before you begin preparing your proposal please ensure you have done or are aware of the following:

**1. MSCA-IF 2019 Deadline**

- 11 September 2019, 17:00:00 **Brussels time**.
- You can submit any time before the deadline. Once you submit you can reopen, edit and resubmit your proposal as many times as required before the call deadline

**2. Mobility requirements**

- General Rule (Standard Fellowships and the TC host for Global Fellowships [GF]) applicants cannot apply for a fellowship in a country where they have lived or carried out their main activity for >12 months in the 3 years before the call deadline (11/09/2019).
- Relaxed Mobility Rule (Reintegration [RI], Career Restart [CAR], Society & Enterprise [SE]): applicants cannot apply for a fellowship in a country where they have **lived or carried out their main activity** for **>36 months in the 5 years** before the call deadline (11/09/2019).

**3. Researcher requirements**

- The applicant must have at least 4 years full-time research experience or a PhD before the call deadline (11/09/2019).

**4. You have a Supervisor who has been informed, and has agreed to host / support you**

- You must have a designated Supervisor in the Host where you aim to go, who will contribute actively to the preparation and submission of the Proposal, and who will mentor you! Some Hosts require that their responsible Office/Unit/Service for EU Grants also checks the proposal.

**5. You have contacted the research office in your host organisation**

- They will support you with the proposal.

**6. You have contacted your relevant MSCA National Contact Point**

- This should be the NCP in the country in which the beneficiary is located. Please retrieve the contact details of your NCP [here](#).

**7. You have read the [MSCA-IF Guide for Applicants 2019](#)**

- This contains the rules and conditions for the Call, drafting instructions for Parts A, Part B1 & B2.

**8. Familiarise yourself with the submission process**

- It is recommended that the main supervisor/contact submits the proposal on the [Funding&Tender Opportunities Portal](#) using the host organisations PIC number. The applicant can be listed as main contact in order to have access to the submission account.
- [Proposal Templates](#) (Part B) can be downloaded once a proposal profile is created on the [Funding&Tender Opportunities Portal](#).

**9. Understand what is required for the submission**

- **Administrative forms (Part A)**
  - Part A constitutes an integral part of your Proposal; it is the part of the Proposal, where you will be asked for certain administrative details that will be used in the evaluation and further processing of your Proposal. For more information refer to section 8 and Annex 3 (page 54) in the [MSCA-IF Guide for Applicants 2019](#).
- **Part B1 Template**
  - Section 1. Excellence
  - Section 2. Impact
  - Section 3. Implementation
- **Part B2 template**
  - Section 4. CV of the Experienced Researcher (5 pages)
  - Section 5. Capacities of the participating organisations (1 page for the overview and 1 page for each participating organisation)
  - Section 6. Ethical Aspects
  - Section 7. Letters of Commitment (GF only)

- **Part B1** will be used by the Evaluators to undertake their assessment. It is importance to familiarize yourself with the evaluation process as outlined in the [MSCA-IF Guide for Applicants 2019](#) .
- **Part B2** is not evaluated but used for further information for Part B1.

**Key tips for the proposal template and layout**

The following information is important to familiarise yourself with as it will make the review process for the evaluator easier. It covers; 1. general points, 2. proposal template, 3. proposal layout and 4. language.

**1. General Points**

- **Acronym:** Use a self-explanatory title and a memorable acronym. Don't forget that you will not be able to change the Acronym once you created your proposal on the Funding&Tender Opportunities Portal. If you want to change it before the deadline you have to re-create a new submission form.
- Ensure that the Acronym is short, easy to pronounce, easy to remember by the Evaluators, and that it cannot be construed as inappropriate in English or in another language.
- The proposal acronym and the fellowship type should be used as a header on each page. There is no cover page for the acronym & title.
- **For resubmissions**, don't just use Evaluation Summary Report from the previous submission.
  - Review the proposal as a whole to find room for improvement.
  - Your new proposal is not being evaluated in comparison with last year's.
  - Part B might change slightly from one year to another (e.g. subheadings). All N4M+ handbooks reflect all changes.
  - Evaluators will have access to last year's ESR after they have marked this year's application.
  - Make sure that the state-of-the art is updated
- Be aware of the overall weighting of each criterion. You need to score well in all sections in order to be funded.

Section	Weighting
<b>1. Excellence</b>	50%
<b>2. Impact</b>	30%
<b>3. Implementation</b>	20%

**2. Proposal Template**

- Use the [proposal template](#) provided including the exact sub-headings:
  - It matches the evaluation template and helps you to put the right information in the right place for the evaluators to find it.

- Evaluators use a “checklist” approach to marking – if the information is not in the correct section, they will give you “zero” for that sub-criterion.
- Insert the proposal acronym in the Header
- Put Page Numbers (format Page X of Y) in the Footer

### 3. Proposal Layout

- Use charts, diagrams, text boxes, figures to explain aspects of the project. Do not just use blocks of text.
- If needed, use tables for illustrating the core text of the proposal. These break up the text and also save space (font size 8). Be aware that tables cannot be used to contain the core text itself (i.e. if you insert long chunks of text in tables for the sole purpose of saving space, REA might contact you after the deadline and ask you to transfer your information from the table into the core text).
- Use the correct font size (11), single line spacing and page margins (min 15 mm) as indicated in the Guide for Applicants.
- Ensure any colour diagrams etc. are understandable when printed (also in black and white).
- Use highlighting where appropriate (bold, underline, italics) but don't overdo it!
- Literature references in footnotes, font size 8 or 9.

### 4. Proposal language

- Avoid jargon. The evaluators might not be experts in your research area.
- Explain any abbreviations.
- Use simple clear text, make sure that it ‘reads well’.
- Avoid long sentences.
- Avoid too much repetition. Sign-post to other parts of the proposal if necessary.
- Do not copy & paste information from other documents/websites. Instead tailor information to fit with your proposal.
- Do not provide web links to explain information (evaluators are not required to follow links). Instead place the relevant information into your text.
- Be consistent with terms used (for example, you can talk in 1<sup>st</sup> person (I, me), 3<sup>rd</sup> person (the researcher, the ER, the fellow), use the same term throughout.

#### How to use the MSCA-IF Handbook

This MSCA-IF handbook can be used to **assist and support** applicants submitting a proposal for the September 11, 2019 deadline. This Handbook should be **used in conjunction with the Part B templates** downloaded from the [Funding&Tender Opportunities Portal](#) as the information in this document complements the information in the Part B templates.

Orange text boxes contain additional suggestions & information for each section of the proposal. We have not removed or replaced any information in the original Part B templates.

Single line text boxes include strengths from Evaluation Summary Reports.

Double line text boxes contain examples of common weaknesses from Evaluation Summary Reports of unfunded applications which were on the reserve list.

## Part B-1

### **Part B-1:**

The **maximum** total length for this document is **10 pages**. It should be composed as follows (detailed description below):

- Section 1: Excellence
- Section 2: Impact
- Section 3: Implementation

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: after the call deadline, **excess pages will automatically be made invisible, and will not be taken into consideration by the experts**.

It is the responsibility of the applicant to verify that the submitted PDF documents are readable and are within the page limit. PDF documents can contain colours.

Applicants will not be able to submit their proposal in the submission system unless **both** Parts 1 and 2 are provided **in PDF format** (Adobe version 3 or higher, with embedded fonts).

**START PAGE COUNT – MAX 10 PAGES**

**DO NOT include any cover page and table of contents as they are no longer part of the template.**

**Any cover page or additional page(s) at the start of part B1 will result in excess pages at the end of part B1, which will automatically be blanked out.**

The proposal starts here at the Excellence section. The maximum total length is 10 pages (Excellence, Impact, Implementation).

- The proposal acronym and the fellowship type should be used as a header on each page.

## **1. Excellence**

### **1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects**

Clearly address the 5 sub-headings for Section 1.1

Provide an introduction, discuss the state-of-the-art, specific objectives and give an overview of the action.

#### **1.1.1 Introduction, discuss the state-of-the-art, specific objectives and give an overview of the action.**

This sub-heading needs to be concise but covers everything asked for (Introduction, state of the art, specific objectives).

##### **Introduction**

- Start with the overall aim of the Individual fellowship so the evaluator knows exactly what it will entail. This should include an introduction to the fellow, supervisor, host organisation and secondment organisation (if relevant). For example:
  - **European Fellowships:** *the researcher X will carry out a fellowship to address (main aim of research). This fellowship will be carried out in (name of host) under the supervision of X. As part of this research the researcher will carry out a secondment in X.*
  - **Global Fellowships:** *the researcher X will carry out a fellowship to address (main aim of research). This fellowship will be carried out in (name of host in TC) under the supervision of X. The researcher will return to (name of European host) for 12 months under the supervision of X.*
- Educate the evaluator on the importance of the research being carried out.
- Explain the importance of the research being carried out and how it addresses a challenge/priority at a global/European level.
- The majority of evaluators will not be expert in the specific subject area so write in a style that is accessible to the non-expert using figures/tables/charts/diagrams to illustrate where appropriate.

**State-of-the-art**

- Break the State-of-the-art (SOA) into separate short paragraphs, each focussing on a separate part of the research project.
- Each paragraph should be focused and relate to a specific objective of the project.
- For each paragraph, briefly outline the current level of knowledge in the research area and highlight how the project will progress the research '**beyond the current state-of-the-art**'. Use up-to-date references!
- If there is SOA work being carried out by your supervisor or by you then mention this here (as it demonstrates your excellence and adequacy to carry out the research).
- You could finish each paragraph with a **bold /text-box statement** of how the project is progressing the area beyond the current state-of-the-art.

**Specific objectives**

- These are the specific research objectives (ROs) of the project.
- These should give the evaluator an insight into what research will be carried out during the project.
- ROs should reflect the state of the art described (see section above). As already mentioned each SOA paragraph should relate to a research objective.
- Each research objective should correspond to the research work packages. For example, objective 1 is the objective for research WP 1.
- Number the objectives O1, O2, O3 etc. and include the corresponding work package in brackets at the end of each objective (WP1).

Discuss the research methodology and approach, highlighting the type of research / innovation activities proposed.

**1.1.2 Discuss the research methodology and approach, highlighting the type of research / innovation activities proposed.**

- In this section you should describe how the research will be carried out.
- Be careful here as you do not have space to describe everything in detail. The proposal is 10 pages long!
- Break this section up into short paragraphs/bullet points to describe the steps/methods you will take to achieve the research objectives proposed.
- Highlight the experiments, blocks of work to carry out, techniques and equipment that will be used.
- If a secondment or short visits are included, be specific about **why they are needed** in terms of the work being carried out (use of equipment, access to data etc).
- For each method/steps described put in brackets the research work package it relates to. The workplan relating to the research WP will be described in detail in section 3.1.

Explain the originality and innovative aspects of the planned research as well as the contribution that the action is expected to make to advancements within the research field. Describe any novel concepts, approaches or methods that will be implemented.

**1.1.3 Explain the originality and innovative aspects of the planned research**

Provide the key aspects of the fellowship that highlight the original and innovative aspects of the proposal. For example, you could have a bullet list:

- Use of equipment, technique, method to investigate a piece of research in novel way.
- Advancement in research being carried out in the host.
- New analysis, concept, method that will be implemented.
- Next stage of development.
- Working with a mix of disciplines beyond the field.
- Non-academic & academic collaboration.
- Communication the research area to a non-scientific audience.
- Receiving a mix of specific and transferable skills in a certain research field.

Discuss the interdisciplinary aspects of the action (if relevant).

**1.1.4 Discuss the interdisciplinary aspects of the action (if relevant).**

- Demonstrate how the research being carried out goes beyond the discipline that is strictly yours.
- Highlight the key interdisciplinary aspects of your proposal (research methodology, supervision, dissemination etc.)

Discuss the gender dimension in the research content (if relevant). In research activities where human beings are involved as subjects or end-users, or in research activities using e.g. animal models, gender differences may exist. In these cases the gender dimension in the research content has to be addressed as an integral part of the proposal to ensure the highest level of scientific quality.

**1.1.5 Gender dimension in the research content**

- Describe any gender aspects in relation to the research.
- Demonstrate how you will analyse/take into account the possible differences between males and females, in the research and innovation **content** of your project.
- Consult this webpage: [http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/gender\\_en.htm](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/cross-cutting-issues/gender_en.htm)
- [Yellow Window](#) provides useful toolkits and training to describe the gender dimension in your areas of research (transport, ICT, energy, health, food etc.)
- [RRI tools](#) – Gender Equality in RRI terms and in practice

**Section 1.1 Common weaknesses in unfunded applications:**

- The proposal fails to present a convincing state of the art analysis and the objectives are not clearly outlined.
- There is insufficient evidence from the proposal that it will go beyond the state-of-the-art.
- The objectives are only vaguely described and do not make the advancements towards existing research sufficiently clear.
- Methodological approaches are insufficiently explained. Generic methods and material to be used are mentioned but some experimental designs to carry out the project are insufficiently detailed
- The originality of the research is not convincingly demonstrated, because the work is a continuation of already published results
- The multi-disciplinarily aspects of the project are not well illustrated

**Section 1.1 Strengths:**

- The proposal has good **innovative potential** in terms of objectives and methodologies applied to a topic of high relevance for xxx industry and **policy** in the European Union.
- The fundamental research problem is clearly described with appropriate references to the state-of-the-art of the field.
- Project objectives are clear, concise and achievable.
- The project addresses different fields of research and has a high number of **multidisciplinary** aspects.
- The **gender** dimension is relevant and well addressed.

**1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**

Outline how a two-way transfer of knowledge (TOK) will occur between the researcher and the host institution(s):

Break up this section into 2 parts as shown in the template: **how the researcher will receive knowledge at the host** (TOK to the researcher from the host) [1.2.1] and how the **researcher will transfer knowledge to the host** [1.2.2] (TOK to the host from the researcher).

1. Explain how the experienced researcher will gain new knowledge during the fellowship at the hosting organisation(s).

A **Career Development Plan** should not be included in the proposal, but will be part of the action's implementation in line with the [European Charter for Researchers](#). It should aim at achieving a realistic and well-defined objective in terms of career advancement (e.g. attaining a leading independent position) or resuming a research career after a break. The plan should be devised with the final outcome to develop and significantly widen the competences of the experienced researcher, particularly in terms of multi/interdisciplinary expertise, inter-sectoral experience and transferable skills.

**1.2.1 TOK to the researcher from the host**

Describe the Personalised Career Development Plan:

- Describe how you and your supervisor will develop a Career Development Plan (PCDP).
- There is no need to include a PCDP in the application but must describe how it will be used during the fellowship. For example: *This plan comprises the researcher's training and career needs, including training on transferable skills, planning for publications and participation in conferences.*

Describe that the researcher will receive training in following types of skills:

- **Research Skills:** These are core skills relating to your project.
- **Additional Research Skills:** These are research skills that will advance your competencies in the research areas
- **Transferable & Complementary Skills:** Transferable skills are the skills you acquire and transfer to future employment settings.

Examples of transferable skills	Examples of advanced research skills
<ul style="list-style-type: none"> <li>• Entrepreneurship &amp; innovation</li> <li>• Grant writing</li> <li>• Patent applications</li> <li>• IPR Management and Patenting</li> <li>• Leadership/Influencing courses</li> <li>• Project management</li> <li>• Gender training (gender issues in research/approaches to gendered innovations)</li> <li>• Presentation skills</li> <li>• Communication training of research results to the non-specialists</li> <li>• Ethics in Research (RRI)</li> <li>• Training in policy briefings</li> <li>• Research community engagement training</li> <li>• CV preparation, interview skills</li> </ul>	<ul style="list-style-type: none"> <li>• Training in new techniques, instruments, equipment</li> <li>• Open science</li> <li>• Big data</li> <li>• Scientific writing</li> <li>• Experimental design</li> <li>• Qualitative &amp; quantitative methods</li> <li>• User design</li> </ul>

Describe the training that will be offered. Typical **training activities** in Individual Fellowships may include:

- Primarily, training-through-research by the means of an individual personalised project, under the guidance of the supervisor and other members of the research staff of the host organisation(s):

#### Training-through-research

- Make sure to clearly show what exact core & advanced research skills you will develop here during your individual personalised project.
- Describe how your supervisor and the rest of the research team will enable you to develop core research skills.

- Hands-on training activities for developing scientific skills (new techniques, instruments, research integrity, 'big data'/'open science') and transferable skills (entrepreneurship, proposal preparation, patent applications, management of IPR, project management, task coordination, supervising and monitoring, take up and exploitation of research results);

#### Hands-on training activities for developing scientific skills

- Your host organisation, secondment organisation and TC host organisation (Global Fellowships only) should provide you with details on hands-on training that can be utilised. For example:
- Staff development programmes, training courses, workshops, online courses, internal meetings.
- The more detail you can provide on the different training opportunities the better (location, course content/topic, date, duration, speaker etc).

#### On the job transferable skills

- Describe how you will develop skills throughout the project (Participation in the research and financial management of the action, dealing with IP issues, project management, task coordination, managing finance, communication & dissemination etc).
- Describe who else in the host will support you during the fellowship with these issues (finance team, technology transfer, research office, communication & outreach).
- Mention also networking skills through working with various members of the institution & external networking/collaborations.

- Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments):

#### Inter-sectoral or interdisciplinary transfer of knowledge

- Remind the evaluator about the secondment you will carry out during the fellowship. Be specific about **why** and **when** these will happen and what knowledge you will gain (research & transferable skills).
- **Also mention also any short visits:** Provide details on opportunities for exposure to other sectors (industry, charity, national archive etc.) where you will gain additional skills and insight, if applicable.

o Participation in the research and financial management of the action

o Organisation of scientific/training/dissemination events

- o Communication, outreach activities and horizontal skills
  - o Training dedicated to gender issues
2. Outline the previously acquired knowledge and skills that the researcher will transfer to the host organisation(s)

### 1.2.2 TOK to the host from the researcher

Explain what knowledge will be transferred to the host from the researcher:

- Describe your current expertise, skills, state of the art techniques that could be applied to research in host.
- Knowledge to address current gaps in the host.
- Existing collaborations/networks that you have from your past work.

Use a table to describe the following:

- o **Knowledge to be transferred:** e.g. specific research skill
- o **Audience in host:** Research team in the host organisation
- o **How it will be transferred:** Workshop with host team on how it can be applied to research/business practices
- o **Benefit to the host:** Researchers in host can apply the technique to current research practices.

For **Global Fellowships** explain which new knowledge and skills will be acquired in the Third Country and how they will be transferred back to the host institution in Europe (the beneficiary) during the incoming phase.

### Global Fellowships and transfer of knowledge to the host institution in Europe

- What specific measures will you use to embed this knowledge into the host organisation and further afield.
- Examples: mentoring students, delivering workshops to the team on your existing skills, building collaborations between your host and your past collaborators.

### Section 1.2 Strengths:

- The two-way transfer between the hosts and the researcher is comprehensive and fully in line with the proposal, for example the researcher would take relevant courses and offer courses and seminars to the students and work in research teams at the host institutes.
- The skills of the researcher and their previous collaborations will be useful for the host group. In turn, the host research group consists of many renowned scientists in addition to the supervisor, which will promote an efficient transfer of knowledge and skills to the researcher.
- The proposal fully explains how the new skills and knowledge acquired in the third country will be transferred back to the research group of the host institution in Europe. (GF)

**Section 1.2 Common weaknesses in unfunded applications:**

- The training during the secondment is not described in sufficient detail.
- The technical training that will be offered to the experienced researcher is not sufficiently described.
- The research and complementary skills, which the researcher will gain during the fellowship and how this will occur is not adequately described.
- The scope of transfer of knowledge to the host institution of the researcher's previously acquired knowledge and skills is not fully convincing.
- Opportunities for the researcher to participate in student supervision during the fellowship are not sufficiently documented.
- Insufficient explanation is given on how the researcher will receive supervision.
- No reference to the career development plan has been made.

**1.3 Quality of the supervision and of the integration in the team/institution**

Break up this section into 2 parts as shown in the template: **Discuss the qualifications and experience of the supervisor(s)** [1.3.1.] and discuss the **hosting arrangements** [1.3.2].

Describe the qualifications and experience of the supervisor(s). Provide information regarding the supervisors' level of experience on the research topic proposed and their track record of work, including main international collaborations, as well as the level of experience in supervising/training especially at advanced level (PhD, postdoctoral researchers). Information provided should include participation in projects, publications, patents and any other relevant results.

**1.3.1 Qualifications and experience of the supervisor(s)**

- Describe your supervisory committee composition. It is important to show this clearly to the evaluator.
  - For **European Fellowships** your primary supervisor and co-supervisor could be members of the same team within the main host.
  - If you are doing a **secondment** you must have a secondment supervisor here also.
  - For a **Global Fellowship**, you will have a supervisor in your European host and in your Third country host.

Provide a few sentences on your supervisor (s) & their key achievements in the area of research such as:

- Years' experience in the field
- Examples of awards received
- International, intersectoral and interdisciplinary collaboration in the area of research.
- Amount of project funding obtained (give examples such as coordinated projects)
- **Supervisory experience** (number of PhD, postdoctoral researchers supervised)
- Number of publications & conferences (give examples of key highlights)
- Patents, commercialisation, spin-offs etc.
- To avoid repetitions, you can refer to B2-5 (capacities table).

- Explain the role of the supervisor(s) in the fellowship (e.g. monitoring research progress, assistance with career development plan (CDP)).
- If you identify a suitable co-supervisor from a partner institution, that could strengthen your proposal. This information will not be included in part A.
- Mention you will review the CDP every 6 months with all the supervisors involved. Refer back to section 1.2 where the CDP plan is described (or you can describe it all here).

Explain the meeting schedule for progress, for example weekly meetings, open door policy, Skype meetings etc.

Describe the hosting arrangements.<sup>1</sup> The application must show that the experienced researcher will be well-integrated within the team/institution so that all parties gain maximum knowledge and skills from the fellowship. The nature and the quality of the research group/environment as a whole should be outlined, together with the measures taken to integrate the researcher in the different areas of expertise, disciplines, and international networking opportunities that the host could offer.

### 1.3.2 Quality of the hosting arrangements

*NB-The hosting arrangements refer to the **integration of the researcher to his new environment** in the premises of the host. It **does not refer to the infrastructure** of the host (IF Guide for Applicants)*

- Mention briefly (more detail will be provided in section 3.2) whether the host organisation has policies for the integration of researchers. For example:
  - If institution has endorsed the [Charter & Code](#) , include in Section 3.2.
  - If they have been awarded the [HR Excellence in Research Logo](#) . 
  - Any other employee & recruitment policies.
- Describe the research group(s)/environment as a whole (various disciplines, opportunities to collaborate during the fellowship, number of people in the research group, technical support etc).
- Explain clearly how the researcher will be integrated into this research group(s)/environment and the wider host institution(s) – internal meetings, induction days, social activities, refer back to training courses that are offered etc.
- Explain the international networking opportunities offered by the host(s).

**Secondment host:** briefly describe how you will be integrated into the secondment host. Do not forget to mention this!

<sup>1</sup>The hosting arrangements refer to the integration of the researcher to his new environment in the premises of the host. It does not refer to the infrastructure of the host as described in the Quality and efficiency of the implementation criterion.

For **Global Fellowships** both phases should be described - for the outgoing phase, specify the practical arrangements in place to host a researcher coming from another country, and for the incoming phase specify the measures planned for the successful (re)integration of the researcher.

**For the outgoing phase (to the Third Country host):**

- Specify the practical arrangements in place to host a researcher coming from another country (visa process etc).
- Explain the integration into the research team/environment.
- Remember: the researcher can spend first 3 months in European host for preparation (mention this here, if applicable).

**Incoming phase (return to European host):**

- Specify the measures planned for the successful (re)integration of the researcher.

**Section 1.3 Strengths:**

- Supervisors show experience in several of the topics presented in this project, as well as experience in FP7 and H2020 projects. One of the supervisors has experience in building start-up companies. (SE)
- The qualifications and experience of the supervisors are very good and appropriate to the scope of the project and convincingly presented. (GF)
- Actions to integrate the researcher into the teams have been sufficiently described. The main host has a process for integration of new researchers in the team, including dedicated staff to aid in administrative and living arrangements, a welcome session, and an orientation period.

**Section 1.3 Common weaknesses in unfunded applications:**

- The proposal lacks in addressing key elements of the quality of supervision, including the qualifications, experience and track record of the supervisor related to the planned research.
- Insufficient detail is provided about the international and national networking possibilities offered by the host.
- The description of the measures to be taken to integrate the researcher within the team lack details on the proposed interactions within the research group and institution.

***1.4 Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship***

Researchers should **demonstrate** how their existing professional experience, talents and the proposed research will contribute to their development as independent/mature researchers,

**during the fellowship.** Explain the new competences and skills that will be acquired and how they relate to the researcher's existing professional experience.

**1.4 Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship**

- Provide an introduction to your specific career goals/ambitions. Be specific here. You can provide more than one intended career direction.
- Tell your story to date and what led you to this point. Try to get the evaluator to relate and understand you. **Keep them interested!**
- Choose the key highlights from your CV (section 4) to show the evaluator your abilities (research achievements, awards received, key conferences etc.).
- Demonstrate how you have key transferable skills (leadership skills and independent thinking).
- At the end of this section remind the evaluator why you are the best person to do this fellowship to achieve the research results and reach your career goals.
- NB Your CV in **Part B2 Section 4** will be reviewed to confirm information given in section 1.4.

**Section 1.4 Strengths:**

- Taking into account the level of experience, the researcher's track record is excellent. The skills that the researcher will achieve during the scholarship are highly relevant and will contribute to her independence as a future group leader
- The actual track records of the researcher and their capacity to conduct independent investigations are comprehensive and very promising as stated in the proposal.

**Section 1.4 Common weaknesses in unfunded applications:**

- The Proposal does not match successfully the researcher's profile with the proposed project. Previous experience is only partially linked with the proposed issue.
- The proposal concentrates on the researcher's current skills base and fails to address how the researcher will develop as an independent researcher during the fellowship  
The researcher has a relatively low track record and it is not clearly articulated how the fellowship will improve the independence of the researcher.

## 2. Impact

Demonstrate in these sections the **expected Impacts** for IF as outlined in the MSCA Work Programme 2018-2020: [http://ec.europa.eu/research/participants/data/ref/h2020/wp/2018-2020/main/h2020-wp1820-msca\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/wp/2018-2020/main/h2020-wp1820-msca_en.pdf).

### At researcher level

- Increased set of skills, both research-related and transferable ones, leading to **improved employability and career prospects both in and outside academia**.
- **Increase in higher impact R&I output**, more knowledge and ideas converted into products and services.
- **Greater contribution to the knowledge-based economy and society**.

### At organisation level

- **Enhanced cooperation** and stronger networks.
- **Better transfer of knowledge** between sectors and disciplines.
- **Boosting of R&I capacity** among participating organisations.

### At a system level

- Increase in **international, interdisciplinary and intersectoral 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.

### 2.1 *Enhancing the future career prospects of the researcher after the fellowship*

Explain the expected impact of the planned research and training (i.e. the added value of the fellowship) on the future career prospects of the experienced researcher **after the fellowship**. Focus on how the new competences and skills (as explained in 1.4) can make the researcher more successful in their long-term career. Explicitly outline the career goals of the experienced researcher.

#### 2.1 *Enhancing the future career prospects of the researcher after the fellowship*

*The text in red refers to an expected impact listed above*

Show how the **skills/experiences improve your employability and career prospects both in and outside academia**.

- Refer to policies/articles in your area calling for better skills/knowledge.

- Give specific examples of your career opportunities in the academic & non-academic sectors.
- Why would the skills & experiences (**research-related and transferable**) acquired during the fellowship benefit such employers and **contributing to better quality research and innovation?**

**Describe the impact of the collaborations made during the fellowship**

- Highlight the impact intersectoral, interdisciplinary collaborations during the fellowship.
- Describe if the collaborations made will allow for a **higher impact R&I output** on your future work, thus **more knowledge and ideas converted into products and services**.
- If relevant, describe the impact of improving the **gender balance in their sector**. You may find useful statistics [here](#).

**How will your research will contribute to the knowledge-based economy & society?**

- Remind the evaluator the importance of your research in **addressing a challenge/priority at a European/Global level**.
- Use numbers to highlight the problem, refer to important policies and [UN Sustainable Development Goals](#) - **pin-point where your research fits in!**
- How will the **skills you develop allow you to address an element of the problem/challenge** after the fellowship?



**Section 2.1 Strengths:**

- The future career prospects foresee an ERC Starting Grant application to be prepared and submitted during the fellowship which is relevant.
- The impact and the added value of the proposal to the researcher future career are very well identified and are included in a comprehensive table.

**Section 2.1 Common weaknesses in unfunded applications:**

- The researcher aims to become a world leading researcher and build a research team in Europe, but the proposal does not provide sufficient information about the measures that will be taken to achieve this and the ways he/she will obtain independent funding.
- Although a position as an independent researcher has been identified as a goal, the future career prospects of the researcher beyond the proposal have not been sufficiently described.  
Considering the current career stage and the experience of the researcher, the proposal could be considered premature and might require further research experience, both in terms of individual research and within team settings.

**2.2 Quality of the proposed measures to exploit and disseminate the project results**

As an introduction to this section remind the evaluator what the **key project results** are, for example: prototype, guidelines, standards, feasibility study etc.

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.

For more details refer to the ["Dissemination & exploitation" section of the H2020 Online Manual](#).

Concrete planning for exploitation and dissemination activities must be included in the Gantt chart.

After describing the key results in the introduction split this section into two parts:

**2.2.1 Dissemination of the project results to target audiences (expert audiences)**  
**2.2.2 Exploitation of project results**

Details for each section are provided in the two text boxes below

**2.2.1 Dissemination of the project results to target audiences (expert audiences)**

- Detail the dissemination activities you will use.
  - Examples include: conferences, industry events, journal publications, workshops, social media, tradeshow, book chapter etc.
- Describe who the target audiences are.
  - Who will be interested in the results described and why (benefit)? For example:
    - Industry examples that could use the results for further development.
    - Research fields (give examples)
    - Expert users (clinicians, companies, services etc)
    - Regulators
    - Types of policy makers that would use the results.
    - Associations who would be interested in the results.
- Do not confuse this with communication to public audiences (2.3).
- Any activities should be included in work package table & Gantt chart (section 3.1).
- Summarise each dissemination activity with specific & realistic details, using a table. For example:

Example of how to describe <u>1</u> dissemination activity				
Activity	Target Audience	When	Where	Metrics

Conference (provide the full name)	List the TA at the conference	Estimated month of project it will take place (M1, M2 etc.)	If known at the time or applicable	Number of attendees etc.
------------------------------------	-------------------------------	-------------------------------------------------------------	------------------------------------	--------------------------

**2.2.2 Exploitation of project results**

In this section you should address:  
 What is the benefit of exploiting results?  
 How will the results of the project be exploited?

Describe the potential **exploitation methods** of your project results that will be used and the impact of the method on the target user/society/industry:

- **Further internal research:** The results coming out of the project can be applied to further research in the field and beyond.
- **Collaborative research:** The results can be used for building/contributing to collaborative research projects.
- **Product development:** Results can be used for developing or contributing to a product, process, technique, design etc.
- **Standardisation activities:** Results could be used to develop new standardisation activities or contribute to ongoing work.
- **Spin-offs:** A separate company will could be established as a result of the research results.
- **Engagement with communities/end users/policymakers:** Describe the activities to ensure that relevant societal actors will benefit from your project. For example, results will be used in policy briefings to impact on policy.

If an exploitation method entails IP/commercial potential:

- Mention who you will seek advice from in your institution on these matters (e.g. Technology Transfer Office).
- Refer to and comply with the “MSCA rules” for IP. Read the [IP management in Horizon 2020 Marie Skłodowska Actions](#).
- Global Fellowships: describe how you have decided to “allocate” IP between the two hosts? The rules for this are simplified in the IP management in Horizon 2020 Marie Skłodowska-Curie Actions.

**Section 2.2 Strengths:**

- The conventional scientific dissemination channels are given. Publications in peer review journals and science magazines are expected so as participation to international conferences and internal seminars.
- Methods of dissemination are appropriately selected for each focus audience including presentations, workshops, management focused seminars and web presentations.

- The commercialisation of the research is considered and the potential IP will be evaluated prior to the publications.

### Section 2.2 Common weaknesses in unfunded applications:

- The academic impact of the research is impaired due to the lack of targeting high quality level journals.
- The publication of the results in more generalist journals to target a broader scientific audience is not sufficiently considered.
- Specific target groups have not been mentioned.
- The proposal insufficiently engages with the possibilities offered by web-based and social media channels of communicating scientific results to academic audiences.

### 2.3. Quality of the proposed measures to communicate the project activities to different target audiences

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 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, Outreach and Communication Activities in the MSCA under Horizon 2020](#) as well as the ["communication" section of the H2020 Online Manual](#).

Concrete planning for communication activities must be included in the Gantt chart.

### 2.3 Proposed measures to communicate the project activities to different target audiences

**Step 1.** Describe the target audiences for communication of project activities:

- These should be non-expert audiences:
  - University Students
  - Primary/ Secondary schools
  - End users (e.g. patients, older adults, young people)
  - Media (editors, journalists etc)
  - Community groups, charities
  - Researchers' Night attendees
  - General public

- What are the key messages you wish to communicate to the different audiences?
- How does the action's work relate to our everyday lives?
- Why does the target audience need to know about the action (encourage a career in research, increase the gender balance in certain areas etc.)?

**Step 2.** Describe how you will reach the various audiences through the following communication activities:

One-way exchange	Two-way exchange
<ul style="list-style-type: none"> <li>• An article in a newspaper or on TV or radio</li> <li>• Use of <b>social media</b></li> <li>• Writing blogs to publish on host website</li> <li>• Press release</li> <li>• Brochures about your project</li> <li>• E-newsletters                             <ul style="list-style-type: none"> <li>• Multimedia releases (video clip via YouTube explaining your work)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Open Door communication: Students/public visit your institution/lab etc. to discuss project activities.</li> <li>• Visit schools, universities, community organisations to promote your research</li> <li>• Public/societal engagement events (European Researchers' Night Event, Pint of Science etc.)</li> </ul>

**Section 2.3 Strengths:**

- The communication plan includes events for public, web page, and social networks.
- Outreach activities are indicated and credible with proposed communication to different target audiences, for example via website, popular science articles, press release, e-newsletter, visitor centre and exhibitions at institute Open Day.
- The proposal presents a short, but adequate work plan, which comprises relevant work packages and major milestones and deliverables. The related graph and the Gantt chart appropriately complement the description of the work plan.

**Section 2.3 Common weaknesses in unfunded applications:**

- The proposal does not describe with the required detail a strategy for targeting other communities apart from the scientific community.
- Outreach public lectures for a general public at the local level are not envisioned.
- The specific means to support communication activities to specific and general audiences are not sufficiently diverse to reach an increased impact.

### 3. Quality and Efficiency of the Implementation

#### 3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

Describe how the work planning (including deliverables and milestones) and the resources mobilised will ensure that the research and training objectives will be reached. Explain why

the number of person-months planned and requested for the researcher (and corresponding to the project duration) is appropriate in relation to the proposed activities.

Additionally, a Gantt chart must be included in the text listing the following:

- Work Packages titles (there should be at least 1 WP);
- Indication of major deliverables, if applicable;
- Indication of major milestones, if applicable;
- Secondments, if applicable.

The schedule should be in terms of number of months elapsed from the start of the action. The Gantt chart counts towards the page count.

This section has three parts which should be clearly defined:

3.1.1 Work packages tables

3.1.2 Appropriateness of tasks

3.1.3 Gantt chart

You will not have much space left at this stage so you must be concise.

### 3.1.1 Work package Tables

There should be at most 6 work packages

- **2-3 research work packages only!**
  - These can run sequentially or concurrently and can be interconnected.
  - Ensure they are in line with details provided in 1.1 research methodology.
- **WP for Management**
  - Meetings with supervisor(s), and standard reports to EU (financial and technical reports at end of fellowship).
  - **WP for Training and Transfer of Knowledge**
  - Tasks/events should match the details in 1.2.
- **WP Dissemination/Exploitation, Communication/Public Engagement**
  - Tasks/events should match the details in 2.2 and 2.3.
  - This is why it is important to have specific examples of dissemination & communication activities rather than listing general examples.

Use the following work package table in order to address everything required and avoid unnecessary blocks of text:

<b>WP Number</b>	<b>Start Month-End Month</b> Do not give the exact date but the estimated month number (M1, M2, M3 etc.).	<b>Secondment or TC host</b> Remind the evaluator which WP will include time outside the main host.
<b>WP Title</b>	Keep concise as the objective described what it will entail.	
<b>Tasks:</b> These are the steps/events/tasks you will carry to complete WPs (T1.1, T1.2)		
<b>Deliverables:</b> Distinct output of the WP (report, data analysis, article, document, prototype, software etc.). There could be different versions of deliverables (for example the CDP is modified every 6 months).		
<b>Milestones:</b> These are control points to help with progress and allow progression to the next stage of the project (completion of data analysis, development of career development plan).		

### 3.1.2 Appropriateness of tasks

- Keep this concise. You do not have space to repeat yourself (1-2 paragraph or bullet points is enough).
- Refer to your tasks in the WP table.
- Describe how the work packages, their timing and the workload make sense.
- Explain why the length of the fellowship (the number of person months) is appropriate to complete all the work foreseen in the work packages.
- Aim to highlight the strengths and feasibility of the work plan.

### 3.1.3 Gantt Chart

- Use the Gantt chart as shown in the IF Part B1 proposal template, see below.
- Adapt as needed according to the activity you have proposed in WPs (3.1.1).
- Remove any columns for a duration longer than that of your proposal.
- Add as much detail as needed for your proposal.

This is an example Gantt chart only.

Notes:

- The titles of the WP's indicated here do not have to be strictly followed or included in the Gantt chart for your specific proposal. Adapt as needed.
- The number of WPs provided here is an example only. Add or remove WP's as needed.
- Remove any columns for a duration longer than that of your proposal.
- Add as much detail as needed for your proposal.

Work Package	Title	Year 1												Year 2												Year 3											
		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
WP1	Management					D1.1																		M1.1												M2, D1.2	
WP2	Data collection						M2.1									D2.1																					
WP3	Field work						M3.1													M3.2		D3.1															
WP4	Research part x																	M4.1, D4.1																M4.2, D4.2			
WP5	Research part y																																		M5.1, D5.1		
WP6	Dissemination and communication					D6.1					D6.2			D6.3							D6.4																
WP7	Secondments																																	M7.1			
...	...																																				

Legend	Milestone	
	Deliverable	

A **deliverable** is a distinct output of the action, meaningful in terms of the action’s overall objectives and may be a report, a document, a technical diagram, a software, etc. Deliverable numbers should be ordered according to delivery dates. Use the numbering convention <WP number>.<number of deliverable within that WP>. For example, deliverable 4.2 would be the second deliverable from work package 4.

**Milestones** are control points in the action that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the action where, for example, the researcher must decide which of several technologies to adopt for further development.

**Section 3.1 Strengths:**

- The work plan as a whole is well designed and appears to be coherent and effective. The estimated time for each work package appears in the Gantt chart.
- The allocation of the tasks and resources in the project has been very carefully executed and is fully justified in the proposal.

**Section 3.1 Common weaknesses in unfunded applications:**

- The feasibility of all the ambitious activities planned within the proposed time frame is not fully demonstrated.
- The allocation of time to tasks is not adequately justified.
- The Gantt chart is not broken down to a sufficient level of detail.
- Some of the deliverables and milestones are not clearly shown in the Gantt chart making it difficult to estimate the time reserved for their execution.
- The training aspects are inadequately indicated in the work packages and within the Gantt chart.
- Exploitation and dissemination is not featured in the work plan in sufficient detail.
- Insufficient textual explanation is provided of the coherence and effectiveness of the work plan.

**3.2 Appropriateness of the management structure and procedures, including risk management**

Describe the organisation and management structure, as well as the progress monitoring mechanisms put in place, to ensure that objectives are reached. Discuss the research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur.

If applicable, discuss any involvement of an entity with a capital or legal link to the beneficiary (in particular, the name of the entity, type of link with the beneficiary and tasks to be carried out).

If needed, please indicate here information on the support services provided by the host institution (European offices, HR services...).

**3.2 Appropriateness of the management structure and procedures, including risk management**

Clearly show you are addressing everything requested by providing the bold headings as shown below (keep concise)!

**Progress monitoring & management structures**

- Explain how the research, training, career planning will be monitored (refer back to 1.2).
- How will supervisors support the project progress (explain meeting schedule).
- Supervisor(s) and the researcher are the main managers – assisted by the host organisation(s) structures.

**Support services provided by the host institution**

- Describe how the host provides an excellent environment for hosting and supporting the MSCA-IF. Separate this into the different support services using a table:

Service	Support offered
HR services and the research office	Has the host endorsed the <a href="#">Charter &amp; Code</a> or earned the <a href="#">“HR Excellence in Research”</a> logo? If yes, say so and include the logo in the Capacities Table (section 5).
Financial MGMT services	Who in the host will support the financial management? Do they have experience with MSCA-IF in the past?
Technology transfer office	Who will support you with any exploitation aspects relating to your project outputs?
EURAXESS	Explain how the host will assist you with settling into your host country and research environments. Specify the use of EURAXESS Services for relocation assistance (hosting agreement).

**Involvement of an entity with a capital or legal link:**

- Only when applicable: name the entity, type of link with beneficiary and their involvement in the project (completing a piece of research, recruitment etc).

**Risks and the contingency plans (Use a table)**

- Identify specific risks that could delay the progress of deliverables (delayed start, equipment failure, insignificant results) & contingency plans.

Project Risks and Contingencies		
Risk	WP Number	Contingency

**Section 3.2 Strengths:**

- The project has a clear and appropriate organisation and management structure, which would be properly monitored by the researcher and supervisor every three months.
- The management structure is adequate for both the outgoing and return phases. Regular meetings are planned, between the supervisor, the researcher and the department (GF).
- The remedial actions planned to overcome the areas of risk identified are appropriate and well described.
- The researcher would have constant and multi-dimensional support, including administrative and financial management, from the host organisation during the project.

**Section 3.2 Common weaknesses in unfunded applications:**

- Potential risks have not been addressed in a very specific way. Alternative experimental strategies and contingency plans are not sufficiently elaborated.
- Risk management, including a description of risk categories, potential risks, likelihood, and mitigation methods, is not fully considered.
- The tasks are not presented in sufficiently detail; resource allocation per task and the tasks' relevance for achieving the scientific objectives is not adequately outlined in the Proposal.

**3.3 Appropriateness of the institutional environment (infrastructure)**

The active contribution of the beneficiary to the research and training activities should be described. For Global Fellowships, the role of the partner organisations in Third Countries for the outgoing phase should also be provided.

Give a description of the main tasks and commitments of the beneficiary and all partner organisations (if applicable).

Describe the infrastructure, logistics, facilities offered insofar as they are necessary for the good implementation of the action.

**3.3 Appropriateness of the institutional environment (infrastructure)**

You will not have much room left by the time you reach this section. Make sure to keep it concise. It should be the conclusion of what has been described above.

Remind the evaluator about the contribution & commitment of the main host, secondment host and/or Third country host to the various activities in the project:

- Research activities (refer back to the research methodology & state of the art reminding the evaluator that the host is an expert in the area).
- Provide a table listing the key infrastructure necessary for the research & training activities.
- It is not necessary to explain what the infrastructure is as you don't have space. When appropriate, refer to B2- Section 5.
- **Research/technical Infrastructure:** equipment, labs, software, technology, data sources, access to end users.
- **Administrative Infrastructure:** staff training resources, library use, access to finance office, research office etc.

**Section 3.3 Strengths:**

- Infrastructure, logistics and facilities offered are suitable for the good implementation of the action.
- The hosts in outgoing and return phase, as well as, the secondment company, all have very good and appropriate facilities and instrumentation. (GF)
- Information regarding the technical support for the researcher is clearly described.

**Section 3.3 Common weaknesses in unfunded applications:**

- The proposal mainly refers to past experience and not sufficiently to the appropriateness of the structures to the proposed project.
- No specific mention is made of the actual research equipment that will be utilised.
- The proposal provides insufficient information regarding the needed infrastructure for the proposed actions in order to exploit, disseminate and communicate results.
- The proposal fails to provide adequate details/ does not describe in sufficient detail with regard to the infrastructure, logistics and facilities that would be offered to the researcher at both host institutions in order to ensure a successful implementation of the proposal.

**STOP PAGE COUNT – MAX 10 PAGES**

**Part B-2**

NB **Part B-1** above and **Part B-2** below should be submitted as two separate PDF documents on the participant portal as shown in the image below.

The screenshot shows a web interface for the MSCA-IF-2019 application. On the left, a sidebar displays application details: H2020-MSCA-IF-2019, user name, topic (MSCA-IF-2019), type of action (MSCA-IF-EF-ST), acronym (IMSCO\_demo), draft ID (SEP-210594474), deadline (September 2019 17:00:00), and 120 days left until closure. A red warning banner at the top right states: "WARNING: This proposal contains changes that have not yet been submitted...". Below this, the "Administrative Forms" section includes buttons for "edit forms", "view history", and "print preview". The "Part B and Annexes" section contains the instruction: "In this section you may upload the technical annex of the proposal (in PDF format only) and any other requested attachments." Below this instruction, there are two rows for uploads: "Part B1" and "Part B2", each with an "upload" button. A large red arrow points to the "upload" button for "Part B2".

**Part B-2:**

Part B-2 must contain sections 4-7 as described below. **No overall page limit** will be applied to this document, but applicants should respect the instructions given per section (e.g. in section 5, a maximum of one page should be used per beneficiary and one page per partner organisation).

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

Applicants will not be able to submit their proposal in the submission system unless **both** Parts 1 and 2 are provided **in PDF format** (Adobe version 3 or higher, with embedded fonts).

**Part B-2 Section 4 - CV of the experienced researcher**

The CV is intrinsic to the evaluation of the whole proposal and is assessed throughout the three evaluation criteria by the expert evaluators. Ensure that the information provided in Parts A and B is fully consistent. Always **provide full dates (dd/mm/yyyy)** in your CV.

The CV should be limited to a maximum of 5 pages and should include **the standard academic and research record**. Any research career gaps and/or unconventional paths should be clearly explained so that this can be fairly assessed by the independent evaluators. At a minimum, the CV should contain:

- a) the **name** of the researcher
- b) **professional experience** (in reverse chronological order, using **exact** dates)
- c) **education** (in reverse chronological order, using **exact** dates)

The CV should also include information on:

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 internationally established conferences and/or international advanced schools.
5. **Research expeditions** led by the experienced researcher.

6. **Organisation of international conferences** in your field(s) of research, including 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 and mentoring** activities.

**Part B-2 Section 4**

- Follow the template above and add other headings if required
- The Template mentions you must provide a list of achievements reflecting your track record. Your track record is evaluated against other researchers in your career stage, discipline and sector (academic/non-academic):
  - E.g. publications/conference participation, granted patents, monographs, book chapter, examples of leadership in industrial innovation.
  - Include bibliographic information for publications e.g. impact factor, number of citations, journal ranking in the field.
  - If you are not the first or lead author on publications, briefly explain your contribution.
- It is important to use the full 5 pages and include all your areas of experience (e.g. teaching, reviewing, consultancy, intersectoral experience, supervision, event organisation, public outreach etc.).
- Please note that what you mention here will also be considered by the Evaluators in relation to Section 1.4 of “Document 1” of Part B.
  - Ensure that what you write here, in terms of sequence of where you have been and when, matches what you have stated in Part A (Section 2...Place of Activity in past 5 years).

In addition, researchers without a doctorate at the call deadline should clearly detail any period of full-time equivalent research experience in the CV (Part B, section 4). It is essential that the CV clearly explains how the research experience is calculated, following the template below.<sup>2</sup>

Academic qualifications counting towards the Total Full time postgraduate research experience			
University degree giving access to PhD <sup>3</sup> :	Institution name and country	Date of award (a)	
		DD/MM/YYYY	
Other university degree(s)/master(s), if any, obtained	Institution name and country	From	To

<sup>2</sup> More entries can be added if needed. **This table is beyond the 5-page limit.**

<sup>3</sup> See [Definition](#) of Full-Time Equivalent Research Experience in this Guide for Applicants

after the award of the university degree giving access to PhD:		DD/MM/YYYY	DD/MM/YYYY	
	Full time research experience	Proportion of research activities as a percentage of the duration of the Master	Duration of research activities expressed in months	
		xx %	(b) <sup>4</sup> = xx% * duration of Master	
Doctorate:	Institution name and country	From	To (Date of expected Award)	
		DD/MM/YYYY	DD/MM/YYYY	
	Full time research experience <sup>5</sup>			Duration of research activities expressed in months
				(c)
<b>Other research activities counting towards the total full-time postgraduate research experience</b>				
Position:	Institution name and country	From	To	
		DD/MM/YYYY	DD/MM/YYYY	
	Full time research experience			
				Duration of research activities expressed in months
			(d)	
<b>Total full-time postgraduate research experience: number of months</b>			<b>= (b)+(c)+(d)</b>	

### Part B-2 Section 5 - Capacity of the Participating Organisations

List of participating organisations (one page)

<sup>4</sup> Please count only time spent in months on research activities.

<sup>5</sup> Please count only time spent until the IF 2019 call deadline (11/09/2019) or the end of the PhD, whichever comes first.

Please provide a list of all participating organisations (the beneficiary and, where applicable, the entity with a capital or legal link to the beneficiary and the partner organisation<sup>6</sup>) indicating the legal entity name, the department carrying out the work and the supervisor.

If a secondment in Europe is planned but the partner organisation is not yet known, as a minimum the type of organisation planned (academic/non-academic) must be stated.

Any inter-relationship between the participating organisation(s) or individuals and other entities/persons (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, etc.) **must** be declared and justified **in this part of the proposal**.

Applicants should provide detailed information regarding the administrative/legal relations between the department carrying out the work as described in the below table and the entity mentioned in Part A of the proposal (i.e. linked to the given Participant Identification Code - PIC).

Participating organisations	Legal Entity Short Name	Country	Supervisor	Role of partner organisation <sup>7</sup>
<u>Beneficiary</u>				
- NAME				
Entity with a capital or legal link				
- NAME				
<u>Partner Organisation</u>				
- NAME				

1 page for each role – choose one of: <i>beneficiary (compulsory)</i> <i>entity with a capital or legal link to the beneficiary (optional)</i> <i>partner organisation for GF (compulsory for GF only)</i> <i>partner organisation for secondment (optional)</i>	
<b>[Full name + Legal Entity Short Name + Country]</b>	
<b>General description</b>	
<b>Academic organisation</b>	(Yes / No) delete as appropriate
<b>Role and profile of key persons (supervisor)</b>	<i>(names, title, qualifications of the main supervisor)</i>

<sup>6</sup> All partner organisations should be listed here, including secondments

<sup>7</sup> For example hosting secondments, for GF hosting the outgoing phase, etc.

<p><b>Dept./Division / Laboratory</b></p>	
<p><b>Key research facilities, Infrastructure and Equipment</b></p>	<p><i>Demonstrate that the beneficiary has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to the recruited experienced researcher</i></p> <p><i>If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and its role in the action in the following table.</i></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>List “telegraphically” the particular infrastructure and/or equipment available to you and your project, along with the facilities and amenities that will be available to you for your training and transfer of knowledge.</p> </div>
<p><b>Independent research premises?</b></p>	<p><i>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 entities?</i></p> <p><i>If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and describe the nature of the link in the following table.</i></p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>The principle here is that each beneficiary has premises, owned or rented, to host the fellows. An established University/Department/Company, etc. does of course have independent research premises. On the contrary, for example, a newly established campus company/university spin-off, that neither owns nor rents premises yet, would not be considered to have independent research premises. On the other hand, a company in an incubator-facility made available free-of-charge would also be considered to have independent research premises.</p> </div>
<p><b>Previous and current involvement in research and training programmes</b></p>	<p><i>Indicate up to 5 <b>relevant</b> EU, national or international research and training actions/projects in which the beneficiary has previously participated and/or is currently participating</i></p>
<p><b>Relevant publications and/or research/innovation products</b></p>	<p><i>(Max 5) Only list items (co-)produced by the supervisor</i></p>

## Part B-2 Section 6 - Ethical Issues

- If you entered one or more ethical issue/s in the Ethical Issues Table in Part A of the Proposal, then you must also submit an Ethics Self-Assessment here.
- Follow the comprehensive information provided in the Template.
- Consult the H2020 [“How to complete your Ethics Self-Assessment”](#)
- Read [Research, Risk-Benefit Analyses and Ethical Issues: A Guidance Document for Researchers Complying with Requests from the European Commission Ethics Reviews](#)
- If no Ethics Issues are associated with your project, then you should still use this heading and state that the Proposal does not pose any Ethics issues.
- Below, some key provisions from the IF GFA 2019 have been included. Before writing the ethical section, consult the original text.

Compliance with the relevant ethics provisions is essential from the beginning to the end of the action and is an integral part of research funded by the European Union within Horizon 2020.

Applicants submitting research proposals for funding for Marie Skłodowska-Curie actions in Horizon 2020 should demonstrate proactively that they are aware of, and will comply with, European and national legislation and fundamental ethical principles, including those reflected in the [Charter of Fundamental Rights of the European Union](#) and the [European Convention on Human Rights and its Supplementary Protocols](#). Another important source is the [UN Convention on the Rights of Persons with Disabilities \(UN CRPD\)](#).

Main ethical principles:

- Respecting human dignity and integrity
- Ensuring honesty and transparency towards research subjects and notably getting free and informed consent (as well as assent whenever relevant)
- Protecting vulnerable persons
- Ensuring privacy and confidentiality
- Promoting justice and inclusiveness
- Minimising harm and maximising benefit
- Sharing the benefits with disadvantaged populations, especially if the research is being carried out in developing countries
- Maximising animal welfare, in particular by ensuring replacement, reduction and refinement ('3Rs') in animal research
- Respecting and protecting the environment and future generations

Please be aware that it is the applicants' responsibility to identify any potential ethical issue, to handle the ethical aspects of the proposal and to detail how these aspects will be addressed. The appropriateness of the measures proposed will be assessed by ethics experts during the ethics review, which is a part of the overall evaluation procedure.

Compliance with the ethical principles and legislation is ensured by the H2020 ethics appraisal scheme (i.e. the H2020 policy on ethics issues in research), which includes all of the following:

- ethics self-assessment (done by the applicants, in their proposal)
- two-stage ethics review, with an ethics screening and, if necessary, an ethics assessment (during the evaluation procedure)
- if necessary, ethics checks, reviews and audits (during the implementation of the action and up to two years afterwards).

### **The Ethics Review Procedure in Horizon 2020**

All proposals likely to be funded will be subject to an ethics review carried out by independent ethics experts. When submitting a proposal to Horizon 2020, all applicants are required to complete an Ethics Issues Table (EIT) in the Part A of the proposal. Applicants who flag ethical issues in the EIT also have to complete a more in depth Ethics Self-Assessment in Part B.

The ethics self-assessment will become part of the Grant Agreement and may thus give rise to binding obligations. The ethics review outcome will distinguish between ethics requirements to be addressed before Grant Agreement signature and those that can be cleared at a later stage (e.g. ethics approvals to be submitted before the start of the concerned research activity). In the latter case, a separate work package 'Ethics Requirements' listing the deliverables will be created automatically.

For more details, please refer to the H2020 ["How to complete your Ethics Self-Assessment"](#) guide.

### **Ethics Self-Assessment (Part B)**

The Ethics Self-Assessment must:

**1) Describe how the proposal complies with ethical principles and the applicable international, EU and national law in the country/countries where the activity raising ethical issues is to be carried out.**

For more information on how to deal with non-EU countries<sup>8</sup> please see Article 34 of the [Annotated Model Grant Agreement](#), as well as the [rules for the protection of personal data inside and outside the EU](#). Please note that activities carried out in a non-EU country must comply with the laws of that country AND be allowed in at least one EU Member State. Applicants **must confirm** in this section that this condition is met.

**2) Ensure timely compliance of the proposed research with ethical principles and the applicable international, EU and national law.**

At the end of Part B2 you can add relevant documents as annexes. If they are not in English, they must be submitted together with an English summary. Please list the documents provided with their expiry date.

---

<sup>8</sup> In the context of ethics appraisal, Third Country refers to non-EU country; Associated Countries are "ethics" TC

Ensure early compliance of the proposed research with EU and national legislation on ethics in research. Should your proposal be selected for funding, you will be required - if applicable - to confirm that you have obtained the following documents needed for implementing the action tasks in question:

If you have not already applied for/received the ethics approval/required ethics documents when submitting the proposal, please indicate in this section the approximate date when you will obtain the relevant approvals/authorisations and any other ethics documents. Please state explicitly that you will not proceed with any research with ethical implications before obtaining the necessary authorizations/opinions.

Should your proposal be selected for funding, you will be required - if applicable - to confirm that, before the beginning of an activity raising an ethical issue, you have obtained:

- (a) any ethics committee opinion required under national law, and
- (b) any notification or authorisation for activities raising ethical issues required under national and/or European law.

*The documents must be kept on file and be submitted upon request by the beneficiary to the REA (see Article 52). If they are not in English, they must be submitted together with an English summary, which shows that the action tasks in question are covered and includes the conclusions of the committee or authority concerned (if available).*

*If you plan to request these ethics documents specifically for your proposed action, your request must contain an explicit reference to the action's title.*

**3) Explain in detail how you intend to address the ethical issues flagged, in particular with regard to:**

- the research objectives (e.g. study of vulnerable populations, cooperation with a Third Country, etc.);
- the research methodology (e.g. clinical trials, involvement of children and related information and consent/assent procedures, data protection and privacy issues related to data collected, etc.);
- processing of sensitive personal data;
- safeguard of the rights and freedoms of the data subjects/research participants;
- the potential impact of the research (e.g. dual use issues, environmental damage, malevolent use, etc.);
- appropriate health and safety procedures - conforming to relevant local/national guidelines/legislation - for the staff involved;
- possible harm to the environment the research might cause (e.g. environmental risks of nanomaterials), and measures that will be taken to mitigate the risks.

In order to facilitate the ethics review of the proposal, you may wish to include in this section one of the following statements (if relevant/applicable). The table below is not about declaring whether the applicants identified ethics issues or not (as done in part A). **Please fill in the table below only if you flagged the corresponding ethics issue in Part A of the proposal. Do not answer yes if**

**opinions/approvals/licenses/authorisations/etc. still have to be obtained.** If applicable, please provide the licence/authorisation/etc. number and issue date.

<b>Humans</b>	
I confirm that templates of the informed consent forms and information sheets (in language and terms intelligible to the participants) will be kept on file.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that opinions/approvals by ethics committees and/or competent authorities for the research with humans have been obtained, and are kept on file.	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Human Cells</b>	
I confirm that authorisation has been obtained from the primary owner of cells/tissues (including references to ethics approval) and is kept on file.	Yes <input type="checkbox"/> No <input type="checkbox"/>
<b>Data protection</b>	
I confirm that a Data Protection Officer (DPO) has been appointed and the contact details of the DPO are made available to all data subjects involved in the research.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that data intended to be processed is relevant and limited to the purposes of the research project (in accordance with the 'data minimisation' principle).	Yes <input type="checkbox"/> No <input type="checkbox"/>
In case of further processing of previously collected personal data, I confirm to have lawful basis for the data processing and that the appropriate technical and organisational measures are in place to safeguard the rights of the data subjects.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that the data used are publicly available and can be freely used for the purpose of the project.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that the transfer(s) of personal data from the EU to a non-EU country or international organisation, is (are) in accordance with Chapter V of the General Data Protection Regulation 2016/679.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that the transfer(s) of personal data from a non-EU country to the EU (or another third state) comply(ies) with the laws of the country in which the data was collected.	Yes <input type="checkbox"/> No <input type="checkbox"/>
I confirm that templates of the informed consent forms and information sheets (in language and terms intelligible to the participants) are kept on file.	Yes <input type="checkbox"/> No <input type="checkbox"/>

<b>Animal</b>	
I confirm that training certificates/personal licenses of the staff involved in animal experiments have been obtained and will be kept on file.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
I confirm that relevant authorisations for animal experiments (covering also the work with genetically modified animals, if applicable) have been obtained, and will be kept on file.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
<b>Third country</b>	
I confirm that the research performed outside the EU is compatible with the Union, National and International legislation and could have been legally conducted in one of the EU Member States.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
I confirm that fair benefit-sharing arrangements with stakeholders from low and/or lower-middle income countries are ensured during the project.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
<b>Environmental protection and safety</b>	
I confirm that appropriate health and safety procedures conforming to relevant local/national guidelines/legislation are followed for staff involved in this project.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>
I confirm that authorisations for relevant facilities (e.g. security classification of laboratory, GMO authorisation) have been obtained and will be kept on file.	<b>Yes</b> <input type="checkbox"/> <b>No</b> <input type="checkbox"/>

### Part B-2 Section 7 - Letter of commitment (GF only)

For Global Fellowship proposals, a *letter of commitment from the partner organisation* (see **template** on page 44) (hosting the outgoing phase in a Third Country) must be included in Part B-2 to ensure their real and active participation. Do not attach this letter as a separate PDF file or as an embedded file since this makes them invisible in the proposal. GF proposals which fail to include a *letter of commitment* of the partner organisation will be declared **inadmissible**. Please make sure that the letter is clearly visible in the submitted part B – every year a number of proposals are declared inadmissible because it is not the case.

Minimum requirements for the letter of commitment:

- heading or stamp from the institution;
- up-to-date (may not be dated prior to the call publication);
- the text must demonstrate the will to actively participate in the (identified) proposed action and the precise role.

Please note that no template for this letter is provided, only general indications.

**Suggestions for the Letter of Commitment:**

- Name the project clearly and demonstrate that the Third country host will actively participate in the Global fellowship. For example:
  - “We commit to project XYZ under the MSCA IF Global. We plan to host Dr. X as an Experienced Researcher for Y months in the period Year1 – Year 2. Dr. X shall carry out YXABC tasks and research, under the supervision of Dr./Prof. XX, in order to achieve goal(s) ABC”, etc.
- Give the correct date on the letter! It is not recommended to use old letters for former submissions.
- Even if electronically submitted, a proper scan with a real signature is considered good form. - Someone with authority should sign the Letter, as indicated in the Template.

TEMPLATE – LETTER of COMMITMENT – GLOBAL FELLOWSHIP

(To be adjusted as appropriate- please include the organisation’s logo as header)

Date: .../ .../ 20xx

**Subject:** Letter of Commitment for Global fellowship application for **Dr./Mr./Ms. X,**

Dear **Ms/Mr/Dr/Prof.,**

This letter sets out our commitment to host and work with the researcher **xxx...** on the project **xxx...** in order to **xxx.... (the aim of the project)**

Hereby as an **academic / or non-academic organisation** we confirm our commitment to host **Mr/Mrs/Dr./Prof. xxx...** in the project **xx**, to be submitted by **xxx.....**, in response to the H2020-MSCA-IF-2019 call, with a closing date of 11 September 2019.

**Our Organization / Department (name) .....**

.....  
 (paragraph about the institution: 3-4 sentences to describe main competencies and research/training activities).

If the MSCA-IF application is funded by European Commission, with the budget provided, we confirm that we will actively participate in the project and support the fellow **(or the name of the fellow)** in their professional career development, specifically through the following activities and measures:

- We will host the fellow **(or the name of the fellow)** and provide adequate research and training opportunities to him/her, including scientific and relevant non-scientific training with a dedicated supervisor(s) **name(s)**
- We will ensure adequate supervision to the fellow hosted at our organisation **(note the name of the supervisor as well)**
- **The fellow will have access to all necessary equipment**
- We will allow the fellow to leave for a secondment to **xxx** institution **(if applicable)**
- **The fellow will follow all relevant HR induction course, safety courses etc. and will benefit from the assistance of institutional supports ---such as the TTO, Communications officer, Finance officer**
- (It is expected that the text demonstrates the will to actively participate in the (identified) proposed action and the precise role. **So please add some more sentences about the precise role of the institution on your specific project.**)

We fully support this application and hope for a successful outcome. **(or something similar)**

Yours sincerely,

**(Name, signature, stamp by legal representative)**