



Marie Skłodowska-Curie Actions

Individual Fellowships 2018 Guide du candidat : Les changements

Avril 2018 - Version n°2

Définitions

Guide du candidat 2017	Guide du candidat 2018
/	p.3 : Action refers to the individual research project proposed for funding.
p.4 : The non-academic sector are any socio-economic actors not included in the academic sector and fulfilling the requirements of the Horizon 2020 Rules for Participation Regulation No. 1290/2013. It includes all non-academic organisations, from industry to business (including SMEs), government, civil society organisations (NGOs, trusts, foundations, etc.), some cultural institutions, museums, hospitals, and international organisations (like the UN or WHO).	p.3 : The Non-Academic Sector encompasses socio-economic actors not included in the academic sector, i.e. non-academic organisations, from industry to business (including SMEs), government, civil society organisations (NGOs, trusts, foundations, etc.), cultural institutions, museums, hospitals, and international organisations (e.g. the UN or WHO) fulfilling the requirements of the Horizon 2020 Rules for Participation Regulation (EU)No. 1290/2013.
p.4 : The Experienced Researcher (ER) is, at the date of the call deadline in possession of a doctoral degree or has at least four years of full-time equivalent research experience. Parental leave periods do not count towards the time of research experience.	p.3 : The Experienced Researcher (ER) must be, at the date of the call deadline, in possession of a doctoral degree or has at least four years of full-time equivalent research experience.
p.4 : Long-term residence means a period at any time in the past of full-time research activity in the EU Member States or Horizon 2020 Associated Countries, which lasted at least 5 consecutive years. Time spent in procedures for obtaining refugee status in a EU Member State or H2020 Associated Country will be counted.	p. 3 : Long-term residence means a period of legal and continuous residence within EU Member States or Horizon 2020 Associated Countries of at least 5 consecutive years. Periods of absence from the territory of the Member State or Horizon 2020 Associated Country shall be taken into account for the calculation of this period where they are shorter than 6 consecutive months and do not exceed in total ten months within this period of five years.

1. Budget, timetable and how to submit

Introduction

Guide du candidat 2017	Guide du candidat 2018
<p>p.5 : Individual Fellowships provide opportunities to acquire and transfer new knowledge and to work on research and innovation in a European context (EU Member States and Associated Countries) or outside Europe.</p>	<p>p.4 : Individual Fellowships provide opportunities to acquire and transfer new knowledge and to work on research and innovation in Europe (EU Member States and Associated Countries) and beyond. The scheme particularly supports the return and (re)integration of European researchers from outside Europe and those who have previously worked here, as well as researchers displaced by conflict outside the EU and Horizon 2020 Associated Countries. It also promotes the career restart of individual researchers who show great potential.</p>

1. Budget, timetable and how to submit

1.1 Indicative budget

Guide du candidat 2017

- p.5** : The indicative budget is EUR 248.70 million, and is distributed as follows:
- EUR 33.70 million is reserved for the Global Fellowships, and is distributed between the scientific areas based on the number of eligible proposals received in each of these areas.
 - EUR 205 million is reserved for the European Fellowships, and is distributed between its panels (except for the Society and Enterprise panel) based on the number of eligible proposals received by each one.
 - EUR 10 million is reserved for the Society and Enterprise panel of the European Fellowships.

Guide du candidat 2018

- p.4** : The indicative budget is EUR **273** million, and is distributed as follows:
- **Global Fellowships: EUR 45 million** distributed between the scientific areas based on the number of eligible proposals received in each of these areas.
 - **European Fellowships: EUR 220 million** distributed between its panels (except for the Society and Enterprise Panel) based on the number of eligible proposals received in each of the panels.
 - **Society and Enterprise Panel: EUR 8 million.**

The distribution of the indicative budget of the call will be proportional to the number of eligible proposals received in each panel, except where a specific budget for a multidisciplinary panel has been fixed in the call. However, there is a higher weighting for the proposals of the IF Career Restart Panel (CAR) and the IF Reintegration Panel (RI). During the budget distribution, the CAR eligible proposals will have a weighting of 2 times the weighting of the eligible proposals in the other panels. For RI the weighting will be 1.5 times higher.

	Proposals received	Proportion of proposals before weight	Funded projects before weight	Weight (as per MSCA W.P.)	Weighted proposals	Weight in percentage	Estimated funded projects with weight
Estimation total EF-ST, EF-CAR, EF-RI	10,000		1,100		11,500		1,100
Estimation EF-ST	8,000	80.00%	880	1	8,000	69.57%	765
Estimation EF-CAR	1,000	10.00%	110	2	2,000	17.39%	191
Estimation EF-RI	1,000	10.00%	88	1.5	1,500	13.04%	143
Budget (€) EF-ST, EF-CAR, EF-RI	220,000,000.00						
Estimated average budget per proposal	200,000.00						

The above table is provided as an example and the figures of submitted and funded proposals should not be considered as binding.

1. Budget, timetable and how to submit

1.3 Proposal submission

Guide du candidat 2017	Guide du candidat 2018
<p>p.6 : The proposal should be prepared by the researcher in liaison with the applicant organisation, which is represented by the main supervisor. It is important to note that the experienced researcher and the supervisor must be two different people.</p>	<p>p.5 : The proposal should be prepared by the researcher in cooperation with the applicant organisation, which is represented by the main supervisor in the framework of the proposal. The experienced researcher and the supervisor must be two different people.</p>
<p>p.6 : Proposals must be submitted before Thursday 14 September 2017, 17:00:00 Brussels time. It is your responsibility to ensure the timely submission of your proposal. To avoid being late and missing the deadline, you should submit your proposal as soon as possible, it remains possible to reopen, edit and resubmit your proposal as many times as required, before the call deadline. The last submitted version will be evaluated.</p>	<p>p.5 : Proposals must be submitted before Thursday 12 September 2018, 17:00:00 Brussels time. To avoid missing the deadline, you should submit your proposal as soon as possible, as it remains possible to reopen, edit and resubmit your proposal as many times as required before the call deadline. Only the last submitted version will be evaluated.</p>
<p>p.6 : Please verify in due time that your operating system and your browser are fully compatible with the Participant Portal submission system (as explained in the Minimum Requirements page). Please note that every year a number of applicants fail in submitting their proposals due to this. Leaving your first submission attempt to the last hours of the call will give you no time to overcome even the smallest technical difficulties, proposal verification problems or communications delays which may arise.</p>	/
<p>p.6 : A complaint will only be successful if the IT audit trail shows that there was a technical problem (at the EC side) which prevented submission³.</p> <p>³ As mentioned in the Grants Manual - Section on Lodging A Complaint About Failed Submission</p>	<p>p.6 : Any complaint regarding proposal submission failure will only be successful if the IT audit trail shows that there was a technical problem at the EC side which prevented submission.⁴</p> <p>⁴ As mentioned in the Grants Manual - Section on Lodging A Complaint About Failed Submission.</p>

1. Budget, timetable and how to submit

1.3 Proposal submission

Guide du candidat 2017	Guide du candidat 2018
<p>p.6 : Keep in mind that only one proposal per researcher may be submitted to this call. In the event of multiple submissions, REA will contact the supervisor and researcher, who will then choose the proposal to be evaluated.</p>	<p>p.6 : Only one proposal per researcher may be submitted to this call. In the event of multiple submissions, the Research Executive Agency (REA) will contact the supervisor and researcher, who will then choose the proposal to be evaluated.</p>
/	<p>p.6 : However, note that a supervisor can be involved in more than one proposal.</p>

2. Participating organisations

2.1 Participant Identification Code

Guide du candidat 2017	Guide du candidat 2018
<p>p.7 : Each beneficiary (and partner organisation if applicable) has to have a Participant Identification Code (PIC) (for which the organisation needs to register, if not already done in the past⁴ on the Horizon 2020 Participant Portal). In case the PIC needs to be registered, the researcher should ask the future beneficiary (and/or partner organisation in the TC if applicable) to register, and under no circumstances register the organisation themselves.</p>	<p>p.6 : Each beneficiary (and partner organisation for Global Fellowships) has to have a Participant Identification Code (PIC). In case the beneficiary does not yet have a PIC, the researcher should ask the future beneficiary (and partner organisation in the TC if applicable) to register, and under no circumstances register the organisation themselves.</p>

⁴ Legal entities having a validated PIC number under FP7 maintain their PIC in H2020. The details of all validated organisations are stored in a Commission database. For the confirmation and, if necessary, revision of the data stored in the database, the Commission asks each organisation to nominate a Legal Entity Appointed Representative (LEAR). The LEARs can view their organisations' legal and financial data online and ask for corrections and changes through the Participant Portal. Each participating organisation must submit documents regarding the nomination of the LEAR before a Grant Agreement can be signed.

2. Participating organisations

2.2 Beneficiary

Guide du candidat 2017	Guide du candidat 2018
<p>p.7 : Where necessary, the beneficiary may call upon entities with a capital or legal link to it⁵ to carry out work under the action (i.e. hosting and training the researcher). Their involvement must be clearly described in Annex 1 (in particular, name of the entity, type of link with the beneficiary and tasks to be carried out) and will be assessed as part of the evaluation. Note that only beneficiaries can recruit researchers and remain fully responsible for the correct implementation of the action.</p>	<p>p.6 : Where necessary, the beneficiary may call upon entities with which they have a capital or legal link⁵ to carry out work under the action (i.e. hosting and training the researcher). Their involvement must be clearly described in the Part B of the proposal (in particular, the name of the entity, type of link with the beneficiary and tasks to be carried out) and will be assessed as part of the evaluation. However, only the beneficiary can recruit the researcher and remains fully responsible for the correct implementation of the action.</p>
<p>p.7 : Attention: Research performed at entities with a capital or legal link to the beneficiary is not considered as a secondment (for details on secondments see part 4.3).</p>	<p>p.5 : Attention: Research performed at entities with a capital or legal link to the beneficiary is not considered as a secondment (for details on secondments see chapter 5).</p>
<p>p.8 : An international organisation located in a MS or AC may be entitled to participate as a beneficiary. The expert evaluators will verify that at least one of the following conditions is fulfilled.</p>	<p>p.7 : An international organisation located in a MS or AC may be entitled to participate as a beneficiary or partner organisation. The expert evaluators will verify that at least one of the following conditions is fulfilled.</p>
<p>p.8 :</p> <ul style="list-style-type: none"> - Such funding is provided for under a bilateral scientific and technological agreement or any other arrangement between the Union and the international organisation 	<p>p.7 :</p> <ul style="list-style-type: none"> - Such funding is provided for under a bilateral scientific and technological agreement⁶ or any other arrangement between the Union and the international organisation <p>⁶ The list of bilateral treaties signed by the EU is available in the Treaties Office database.</p>

2. Participating organisations

2.2 Beneficiary

Guide du candidat 2017	Guide du candidat 2018
<p>p.8 : An "International European Interest Organisation" (IEIO) is defined in Article 2.1(12) of the Horizon 2020 Rules for Participation Regulation as "an international organisation, the majority of whose members are Member States or Associated Countries, and whose principal objective is to promote scientific and technological cooperation in Europe".</p>	<p>p.7 : An "International European Interest Organisation" (IEIO) is an international organisation, the majority of whose members are Member States or Associated Countries, and whose principal objective is to promote scientific and technological cooperation in Europe.⁷</p> <hr/> <p>⁷ See Article 2.1(12) of the Horizon 2020 Rules for Participation Regulation.</p>
<p>p.8 : The IEIO rules also apply to the European Commission Joint Research Centre (JRC) or to an 'entity created under Union law' (see Article 9(2) of the Horizon 2020 Rules for Participation Regulation).</p>	<p>p.7 : This rule also applies to the European Commission Joint Research Centre (JRC) or to an 'entity created under Union law'.⁸</p> <hr/> <p>⁸ See Article 9(2) of the Horizon 2020 Rules for Participation Regulation.</p>

2. Participating organisations

2.3 Partner organisation

Guide du candidat 2017	Guide du candidat 2018
/	p.7 : Partner organisations contribute to the implementation of the action, but do not sign the Grant Agreement. However, beneficiaries are encouraged to sign a partnership agreement with the partner organisations (for the internal relationship between participating organisations). These partnership agreements must comply with the Grant Agreement.
<p>p.8 : Partner organisations are -</p> <ul style="list-style-type: none"> organisations in MS or AC that host the researcher during optional secondments and provide additional training. <p>or, and uniquely in the case of Global Fellowships -</p> <ul style="list-style-type: none"> organisations in TC that host the researcher during the compulsory initial outgoing period and provide additional training. <p>Partner organisations involved in secondments and located in MS or AC are not requested to provide any supporting documents (e.g. letter of commitment). However, it is strongly recommended that the beneficiary concludes a partnership agreement with all partner organisations involved in the action.</p> <p><u>For GLOBAL FELLOWSHIPS only, the</u> Partner organisations located in TC</p> <ul style="list-style-type: none"> must include in Part B of the proposal an up-to-date letter of commitment⁶ to ensure their real and active participation in the proposed action. Their precise role should also be clearly described in the proposal. During the evaluation of proposals, experts are instructed to disregard the contribution of any partner organisation for which such evidence of commitment is required, but not submitted. Thus, for Global Fellowships, if the letter of commitment of the TC partner organisation is not provided, the proposal will be considered incomplete and therefore will be declared inadmissible. may exceptionally conclude an additional employment contract with the researcher to ensure equivalent social security coverage during the stay in the TC. Such an additional contract does not increase the total budget for the proposal. 	<p>p.8 : There are two types of partner organisations:</p> <ol style="list-style-type: none"> Organisations in MS or AC (for all types of actions) that host the researcher during optional secondments and provide additional training. These partner organisations are not requested to provide any supporting documents (e.g. letter of commitment). Only for Global Fellowships, organisations located in the TC that host the researcher during the compulsory outgoing phase and provide additional training. These partner organisations need to provide a letter of commitment at the proposal stage and may exceptionally sign an additional employment contract with the researcher to ensure equivalent social security coverage during the stay in the TC. Such an additional contract does not increase the total budget for the action.

2. Participating organisations

2.3 Partner organisation

Guide du candidat 2017	Guide du candidat 2018
<p>p.9 : Example: A French experienced researcher is recruited for a Global Fellowship by a German beneficiary and will be hosted during the initial outgoing period by an organisation in the USA. The employment contract with the German beneficiary is concluded for the total duration of the action. In addition, the US host organisation concludes an additional employment contract with the researcher for the duration of the initial outgoing period. This may enable the researcher to work under the conditions applicable to local researchers holding a similar position (e.g. regarding medical/social insurance).</p>	<p>p.8 : Example: A French experienced researcher is recruited for a Global Fellowship by a German beneficiary and will be hosted during the outgoing phase by an organisation in the USA. The employment contract with the German beneficiary is concluded for the total duration of the action. In addition, the US host organisation concludes an additional employment contract with the researcher for the duration of the outgoing phase to ensure equivalent social security coverage. This may enable the researcher to work under the conditions applicable to local researchers holding a similar position (e.g. regarding medical/social insurance).</p>

2. Participating organisations

2.4 Obligations of beneficiaries

Guide du candidat 2017	Guide du candidat 2018
<p>p.9 : The host organisations will therefore be required to meet certain working conditions relating to the researcher, as explained in the Information package for MSCA fellows, which should be in line with the principles set out in the European Charter for Researchers and in the Code of Conduct for the Recruitment of Researchers (Charter and Code).</p>	<p>p.8 : Beneficiaries are required to ensure certain working conditions for the researcher, as explained in the Information package for MSCA fellows, which should be in line with the principles set out in the European Charter for Researchers and in the Code of Conduct for the Recruitment of Researchers (Charter and Code).</p>
<p>p.9 : The beneficiary must make its best effort to implement the principles set out in the Charter and Code. Some of these principles are also reflected in the core of the Grant Agreement (for instance, the obligation for the beneficiary to ensure that the researcher is adequately supervised) and are therefore contractually binding.</p>	<p>p.8 : The principles of the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers (Charter and Code) promoting open recruitment and attractive working and employment conditions are a cornerstone of the MSCA and all beneficiaries must take all measures to implement them in line with the provisions of the Grant Agreement.</p>

3. Types of individual fellowships and eligibility conditions

Introduction

Guide du candidat 2017	Guide du candidat 2018
p.9 : Applicants have to indicate at submission stage in which of the 8 scientific areas their proposal best fits, according to the research topic. These areas are :	p.9 : Applicants have to indicate at submission stage in which of the eight scientific areas their research topic fits best :
/	p.9 : A table summarising the results and funding thresholds for the previous call can be consulted here .
/	<p>p.9 : For all types of action the beneficiary must check the information regarding the experienced researcher's eligibility at the call deadline (<i>i.e. diploma, research experience, career break, residency, mobility, family status, etc.</i>).</p> <p>In case of doubts about the researcher's eligibility, the submission of documentary evidence may be requested by the REA after the call deadline.</p>

5. Additional information on duration of fellowships, mobility and secondments

5.1 Duration of fellowships

Guide du candidat 2017	Guide du candidat 2018
<p>p.16 : The duration for European Fellowships (ST, CAR, RI, and SE) is between 12 and 24 months.</p> <p>For the Global Fellowships there is an initial outgoing phase between 12 and 24 months, and an additional mandatory 12 months return phase, making the total duration of this type of fellowship between 24 and 36 months.</p>	<p>p.16 : The duration of Standard, Society & Enterprise and Reintegration European Fellowships is between 12 and 24 months.</p> <p>The duration of Career Restart European Fellowships is between 12 and 36 months.</p> <p>The duration of Global Fellowships is between 24 and 36 months. For the Global Fellowships there is an outgoing phase between 12 and 24 months, and an additional mandatory 12 month return phase.</p>

5. Additional information on duration of fellowships, mobility and secondments

5.2 Mobility

Guide du candidat 2017	Guide du candidat 2018
<p>p.16 : The European Commission considers mobility between organisations as an asset for the personal and career development of researchers. It allows the enhancement of collaboration, and the acquisition of new skills and knowledge which contribute to increased creativity, efficacy and performance.</p>	<p>p.16 : The European Commission considers mobility between organisations to be asset for the personal and career development of researchers. Such mobility strengthens intersectoral collaboration, and promotes the acquisition of new skills and knowledge thereby contributing to increased research creativity, efficacy and performance.</p>
<p>p.16 : In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested, after the call deadline.</p>	<p>p.16 : Supporting documents may be requested to confirm the place of residence and the place of main activity, such as employment contracts, work permits, rental contracts, residence certificates etc.</p>

5. Additional information on duration of fellowships, mobility and secondments

5.3 Optional secondments

Guide du candidat 2017	Guide du candidat 2018
<p>p.16 : During the implementation of the IF the experienced researcher may be seconded outside their host organisation to an organisation in a MS or AC. Such secondments must significantly contribute to the impact of the fellowship.</p>	<p>p.17 : During the implementation of the action the experienced researcher may be seconded outside their host organisation to an organisation in a MS or AC. Secondments of the researcher to partner organisations are encouraged, but they should be relevant, feasible, and beneficial for the researcher and in line with the project objectives.</p>
<p>p.17 : A secondment is allowed during any phase of the project to any entity of a MS/AC. However, in Global Fellowships, secondments to the host institution in the MS/AC are allowed during the outgoing phase¹⁵.</p> <p>¹⁵ Please note that this would only be allowed in justified cases, i.e. if the secondment is necessary to comply with national legislation on social security.</p>	<p>p.17 : A secondment is allowed during any phase of the project to any entity located in a MS/AC. While secondments can take place within the same sector, inter-sectoral secondments are highly encouraged. Entities with a capital or legal link with the host organisation cannot host secondments.</p> <p>For Global Fellowships, such an optional secondment can also take place at the start of the action at the beneficiary or its entity with a capital or legal link and/or a partner organisation in a MS or AC for a maximum of 3 months, allowing the researcher to spend time there before moving on to a partner organisation in a Third country. In such cases, the initial secondment will be considered as part of the outgoing phase.</p>

6. Financial aspects

Introduction

Guide du candidat 2017						Guide du candidat 2018					
p.18 :						p.17 :					
	Researcher unit cost in EUR person/month			Institutional unit cost in EUR person/month			Researcher unit cost in EUR person/month			Institutional unit cost in EUR person/month	
	Living Allowance	Mobility Allowance	Family Allowance	Research, training and networking costs	Management and indirect costs		Living Allowance	Mobility Allowance	Family Allowance	Research, training and networking costs	Management and indirect costs
Individual Fellowships	4,650	600	500	800	650	Individual Fellowships	4,880	600	500	800	650

6. Financial aspects

6.1 Researcher allowances

Guide du candidat 2017		Guide du candidat 2018	
p.18 : The living allowance is the EU contribution to the gross salary costs of the researcher and amounts to EUR 4,650 per month. It can only be used to this end.		p.19 : The living allowance is the EU contribution to the gross salary costs of the researcher and amounts to EUR 4,880 per month. It can only be used to this end.	
/		p.19 : During the implementation phase of the action, researchers may opt to work part-time in order to pursue supplementary activities. These might include creating a company, or engaging in advanced studies not related to the MSCA grant. Note, however, that part-time work on these grounds cannot be requested during the outgoing phase of the Global Fellowships. Any supplementary activities carried out part-time in parallel with the MSCA action must be agreed upon by the researcher and the beneficiary and are subject to the prior approval of the REA.	

6. Financial aspects

6.1 Researcher allowances - suite

Guide du candidat 2017	Guide du candidat 2018
<p>p.18-19 : Important notice on Living Allowance The living allowance is a gross EU contribution. [...] The rate indicated above is for researchers devoting themselves to the action on a full-time basis. Part-time employment for personal or family reasons can be accepted. In this case costs will be reported as pro-rata of the fulltime (30 days/month) unit cost.</p>	<p>p.19 : Important notice on Living Allowance The living allowance is a gross amount. [...] The rate indicated above is for researchers devoting themselves to the action on a full-time basis. In case of part-time, costs will be reported as pro-rata of the full-time (30 days/month) unit cost.</p>
<p>p.19 : Only in cases when national law prohibits full employment contracts/equivalent direct contracts are fixed amount fellowships permitted, and then only with the prior approval of the Research Executive Agency. The minimum required is that the researcher is covered under a social security scheme providing at least sickness and parental benefits, cover for invalidity and accidents at work and occupational diseases, and covering the researcher in every place of implementation of the IF activities. For fixed amount fellowships, the living allowance is 50% of the amount foreseen for the contract of employment. Other cost categories are not affected by this reduction.</p>	<p>p.19-20 : The beneficiary implementing the action must recruit the researcher under an employment contract or other direct contract with equivalent benefits, including social security coverage (type A). Fixed amount fellowships (type B) are permitted only in cases when national law prohibits full employment contracts/equivalent direct contracts, and then only with the prior approval of the REA. In this case, the living allowance will be reduced by 50%. The minimum required is that the researcher is covered under a social security scheme providing at least sickness and parental benefits, cover for invalidity and accidents at work and occupational diseases, and covering the researcher in every place of implementation of the IF activities. Other cost categories are not affected by this reduction.</p>
<p>p.19 : The family status of a researcher will be determined at the date of deadline of the call (i.e. 14 September 2017) and will not be revised during the lifetime of the action.</p>	<p>p.20 : The family status of a researcher will be determined at the date of deadline of the call (i.e. 12 September 2018) and will not be revised during the lifetime of the action.</p>

6. Financial aspects

6.2 Institutional unit costs

Guide du candidat 2017	Guide du candidat 2018
<p>p.20 : This amounts to EUR 800 per month and is managed by the beneficiary to contribute to expenses related to, for example:</p> <ul style="list-style-type: none"> the participation of researchers in training activities expenses related to research and networking costs 	<p>p.20 : This amounts to EUR 800 per month and is managed by the beneficiary to contribute to expenses related to:</p> <ul style="list-style-type: none"> costs for training and networking activities that contribute directly to the researcher's career development (e.g. participation in conferences, trips related to the work of the action, training, language courses, seminars, lab material, books, library records, publication costs) costs for research expenses costs for visa-related fees and travel expenses additional costs arising from secondments (e.g. travel costs, accommodation costs for optional secondments)
/	<p>p.21 : Research, training and networking unit costs should be used for the research, training and networking activities outlined in Part B of the proposal, but unused amounts may be used for other action-related purposes (e.g. to increase the salary of a researcher or to organise additional training activities).</p>

6. Financial aspects

6.3 Budget calculation

Guide du candidat 2017	Guide du candidat 2018
<p>p.20 : It is crucial that the information given in Part A about the participating organisations and researcher is correct and up-to date and that it is identical to the information given in Part B and its Annexes.</p>	<p>p.21 : It is crucial that the information given in Part A about the participating organisations and researcher is correct and up-to date and that it is identical to the information given in Part B.</p>
<p>p.21 : A married Chinese researcher obtained her PhD in Physics on 15 May 2008 in France and was employed in research full time since 16 May 2008 at a Polish University.</p>	<p>p.22 : A married Chinese researcher obtained her PhD in Physics on 15 May 2008 in Sweden and was employed full-time since 16 May 2008 in Poland.</p>

7. The Evaluation process

7.1 General

Guide du candidat 2017	Guide du candidat 2018
<p>p.21 : The evaluation of proposals is carried out by the Research Executive Agency with the assistance of independent experts.</p>	<p>p.22 : The evaluation of proposals is carried out by the REA with the assistance of independent experts.</p>
<p>/</p>	<p>p.22-23 : In each of the eight scientific areas (panels) a Chairperson ("Chair"), assisted by several Vice-Chairs (depending on the size of the panel) will assist REA staff with the management of the evaluation. Chairs and Vice-Chairs are distinguished members of the scientific community who do not evaluate proposals. Their tasks include the following: finalising the assignment of three experts to each proposal, providing guidance to evaluators, checking the quality and consistency of the experts' reports, attending the panel review meetings to endorse the final ranked lists of proposals for funding.</p>

7. The Evaluation process

7.2 Eligibility and admissibility check

Guide du candidat 2017	Guide du candidat 2018
p.22 : On 14 September 2017, 17:00:00 Brussels time, all proposals submitted through the electronic submission system of the Participant Portal will be registered into a database.	p.23 : On 12 September 2018 , 17:00:00 Brussels time, all proposals submitted through the electronic submission system of the Participant Portal will be registered in a database.
p.22 : Proposals which do not fulfil these criteria will not be included in the evaluation. All applicants will be informed at the same time (within five months after the call deadline) about the outcome of the evaluation or the result of the admissibility and eligibility check. Note that a proposal may be declared ineligible or inadmissible at any stage.	p.23 : Proposals which do not fulfil these criteria will not be evaluated . Applicants will be informed within five months after the call deadline about the outcome of the evaluation or the result of the admissibility and eligibility check. A proposal may be declared ineligible or inadmissible at any stage.
<p>p.22 : To be considered admissible, a proposal/application must be:</p> <ul style="list-style-type: none"> a. submitted in the electronic submission system before the deadline given in the call conditions or rules of contest b. readable, accessible and printable <p>Incomplete proposals may be considered inadmissible. Therefore, the proposal must include both the requested administrative forms in Part A and the proposal description in Part B with all sections. Applicants should follow the template and instructions for drafting the part B included in this guide.</p> <p>If a proposal is ineligible under the panel it was initially submitted in, but eligible in another one in the same call, it will be transferred accordingly¹⁸ (e.g. a proposal submitted under EF-CAR where the career research break is less than 12 months, will be transferred to EF-ST, if eligible).</p>	<p>p.22-23 : To be considered admissible, a proposal must be:</p> <ul style="list-style-type: none"> a. submitted in the electronic submission system before the deadline given in the call conditions; b. readable, accessible and printable; c. complete and include the requested administrative data, the proposal description, and any obligatory supporting documents specified in the call; d. include a draft plan for the exploitation and dissemination of the results in Part B-1 Section 2. <p>Applicants should follow the template and instructions for drafting the Part B included in this guide.</p>

7. The Evaluation process

7.3 Evaluation of proposals

Guide du candidat 2017	Guide du candidat 2018
p.23 : Each proposal will be assessed independently by at least three experts. For each proposal an expert will be designated as the "rapporteur" and will assume additional responsibilities in the evaluation phase.	p.24 : Each proposal will be assessed independently by at least three experts. For each proposal one expert will be designated as the "rapporteur" and will assume additional responsibilities in the evaluation phase (drafting of Consensus report, moderation of the remote consensus, implementation of comments from the Vice-Chairs).
p.23 : The operational capacity of the beneficiary shows whether an applicant has the operational resources and capacity to implement the action, and, in particular, the parts in the proposal for which it is responsible. This is the purpose of the table in Section 5 of Document B-2.	p.22-23 : The operational capacity of the beneficiary relates to whether an applicant organisation has, or will have in due time, the operational resources and capacity to implement the action. This is the purpose of the table in Section 5 of Part B (see chapter 9).
p.23 : The proposals will be evaluated against the MSCA-IF award criteria applying weighting factors, both set out in the Work Programme. Proposals will not be evaluated anonymously. Proposals may be evaluated remotely.	p.24 : The proposals will be evaluated against the MSCA-IF award criteria applying weighting factors, both set out in the Work Programme. Proposals are evaluated remotely.

7. The Evaluation process

7.3 Evaluation of proposals

Guide du candidat 2017

p.24 :

IF - Marie Skłodowska-Curie Individual Fellowships		
Excellence	Impact	Quality and efficiency of the implementation
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the potential and future career prospects of the researcher	Coherence and effectiveness of the work plan
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the allocation of tasks and resources
Quality of the supervision and of the integration in the team/institution	Quality of the proposed measures to communicate the project activities to different target audiences	Appropriateness of the management structure and procedures, including risk management
Capacity of the researcher to reach or re-enforce a position of professional maturity/independence		Appropriateness of the institutional environment (infrastructure)
50%	30%	20%
Weighing		
1	2	3
Priority in case of <i>ex aequo</i>		
NB: An overall threshold of 70% will be applied to the total weighted score.		

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p.24-25 :

IF - Marie Skłodowska-Curie Individual Fellowships		
Excellence	Impact	Quality and efficiency of the implementation
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the future career prospects of the researcher after the fellowship	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the management structure and procedures, including risk management
Quality of the supervision and of the integration in the team/institution	Quality of the proposed measures to communicate the project activities to different target audiences	Appropriateness of the institutional environment (infrastructure)
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship		
50%	30%	20%
Weighing		
1	2	3
Priority in case of <i>ex aequo</i>		
NB: An overall threshold of 70% will be applied to the total weighted score.		

9. Part B of the proposal

9.1 General information and instructions

Guide du candidat 2017	Guide du candidat 2018
<p>p.29 : The page limit is respected (pages beyond this limit will NOT be read by the evaluators)</p>	<p>p.29 : the 10-page limit is respected (after the call deadline, excess pages above this limit will automatically be made invisible, and will not be taken into consideration by the experts).</p>
<p>p.29 : The page formatting will be systematically checked by the REA. In case a proposal will not comply with it, applicants will be asked to reformat their proposal. This often leads to having excess pages which will be disregarded.</p>	<p>p.29 : Tables are for illustrating the core text of the proposal. They cannot be used to contain the core text itself.</p> <p>The page formatting will be systematically checked by the REA. Should a proposal not comply, applicants will be asked to reformat their proposal. This can lead to excess pages which will subsequently be disregarded.</p>

9. Part B of the proposal

9.1 General information and instructions

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p.23 :

Part B-1:

The **maximum** total length for this document is **13 pages**. It should be composed as follows (detailed description below):

- | | | |
|--|-----------------------|---------------|
| - Start Page | ...must consist of... | 1 whole page. |
| - Table of Contents | | 1 whole page. |
| - List of Participating Organisations | | 1 whole page. |
| - Section 1: Excellence (starts on page 4) | } | 10 pages MAX. |
| - 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, **excess pages** will be **watermarked** and experts will be strictly instructed to **disregard** them.

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 | 5 pages MAX. |
| - Section 5: Capacities of the participating organisations | 1 page / participating organisation. |
| - Section 6: Ethical aspects | |
| - Section 7: Letter of commitment of the partner organisation (for GF only) | |

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

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p.24 : x

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.

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).

9. Part B of the proposal

9.2 Template of Part B of the proposal

Guide du candidat 2017	Guide du candidat 2018
<p>p.31 :</p> <div data-bbox="267 354 1075 1259"> <p><u>Part B-1 Start Page</u></p> <div data-bbox="287 439 1054 1086"> <p>START PAGE</p> <p>MARIE SKŁODOWSKA-CURIE ACTIONS</p> <p>Individual Fellowships (IF) Call: H2020-MSCA-IF-2017</p> <p>PART B</p> <p>“PROPOSAL ACRONYM”</p> <p>This proposal is to be evaluated as:</p> <p>[EF-ST] [EF-CAR] [EF-RI] [EF-SE] [GF] [Delete as appropriate]</p> <p>Part B - Page X of Y</p> </div> <p><u>Part B-1 Table of contents</u></p> <p>There are no specific instructions about the table of contents. It can cover both part B1 and B2.</p> <p><i>This section must consist of 1 whole page.</i></p> </div>	<p>p.31 : NB: The start page and table of contents are no longer part of the template.</p>

9. Part B of the proposal

9.2 Template of Part B of the proposal

Guide du candidat 2017

p.32 :

Participating organisations	Legal Entity Short Name	Academic (tick)	Non-academic (tick)	Country	Dept./ Division / Laboratory	Supervisor	Role of Partner Organisation ²²
<u>Beneficiary</u>							
- NAME							
Entity with a capital or legal link							
- NAME							
<u>Partner Organisation</u>							
- NAME							

For non-academic beneficiaries, please provide additional data as indicated in the table below.

Name	Location of research premises (city / country)	Type of R&D activities	No. of full-time employees	No. of employees in R&D	Web site	Annual turnover (approx. in Euro)	Enterprise status (Yes/No)	SME status ²³ (Yes/No)

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.

The information in the table for non-academic beneficiaries must be based on current data, not projections.

This section must consist of 1 whole page.

Guide du candidat 2018

p.39 :

Participating organisations	Legal Entity Short Name	Country	Supervisor	Role of partner organisation ²⁵
<u>Beneficiary</u>				
- NAME				
Entity with a capital or legal link				
- NAME				
<u>Partner Organisation</u>				
- NAME				

Nota Bene : Les colonnes « Academic (tick) » et « Non-academic (tick) » ont été supprimées

Le tableau concernant les bénéficiaires non académiques a été supprimé

9. Part B of the proposal

9.2 Template of Part B of the proposal

Guide du candidat 2017

p.42 :

Beneficiary X	
General Description	
Role and Profile of key persons (supervisor)	<i>(names, title, qualifications of the main supervisor)</i>
Key Research Facilities, Infrastructure and Equipment	<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> <i>If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and its role in the action.</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 entities?</i> <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..</i>
Previous Involvement in Research and Training Programmes	<i>Detail any (maximum 5) relevant EU, national or international research and training actions/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 beneficiary is currently participating</i>
Relevant Publications and/or research/innovation products	<i>(Max 5) Only list items (co-)produced by the supervisor</i>
Partner Organisation Y	
General description	
Key Persons and Expertise (supervisor)	
Key Research facilities, infrastructure and equipment	
Previous and Current Involvement in Research and Training Programmes	
Relevant Publications and/or research/innovation product	<i>(Max 3)</i>

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p.40 :

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>	
[Full name + Legal Entity Short Name + Country]	
General description	
Academic organisation	<i>(Yes / No) delete as appropriate</i>
Role and profile of key persons (supervisor)	<i>(names, title, qualifications of the main supervisor)</i>
Dept./Division / Laboratory	
Key research facilities, Infrastructure and Equipment	<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> <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>
Independent research premises?	<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> <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>
Previous and current involvement in research and training programmes	<i>Indicate up to 5 relevant EU, national or international research and training actions/projects in which the beneficiary has previously participated and/or is currently participating</i>
Relevant publications and/or research/innovation products	<i>(Max 5) Only list items (co-)produced by the supervisor</i>

Annex 1 – Overview of the actions

Guide du candidat 2017

p.15 :

INDIVIDUAL FELLOWSHIPS		EUROPEAN (EF)				GLOBAL
		ST	CAR	RI	SE	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	ANY	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC directly to MS or AC (location of the host institution)	From ANY country to MS or AC	From ANY country to TC then to MS/AC
		≤ 12 months in the last 3 years	≤ 36 months in the last 5 years	≤ 36 months in the last 5 years	≤ 36 months in the last 5 years	≤ 12 months in the last 3 years
	Career break in research	-	≥ 12 months prior to call deadline	-	-	-
PARTICIPANTS	Beneficiary	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Entity with a capital or legal link	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Partner Organisation	MS or AC	MS or AC	MS or AC	MS or AC (both academic and non-academic)	Outgoing phase (mandatory): TC
						Secondment (optional): MS or AC
DURATION (months)		12 to 24	12 to 24	12 to 24	12 to 24	12 to 24 + 12
SCIENTIFIC AREAS		8	8	8	8	8
NUMBER OF RANKING LISTS		8	1	1	1	8
BUDGET (total EUR 248.7 million)		EUR 205 million			EUR 10 million	EUR 33.70 million

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p.45 :

INDIVIDUAL FELLOWSHIPS		EUROPEAN (EF)				GLOBAL
		ST	CAR	RI	SE	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	ANY	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC directly to MS or AC (location of the host institution)	From ANY country to MS or AC	From ANY country to TC then to MS/AC
		≤ 12 months in the last 3 years	≤ 36 months in the last 5 years	≤ 36 months in the last 5 years	≤ 36 months in the last 5 years	≤ 12 months in the last 3 years
	Career break in research	-	at least 12 months within 18 months prior to call deadline	-	-	-
PARTICIPANTS	Beneficiary	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Entity with a capital or legal link	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Partner Organisation	MS or AC	MS or AC	MS or AC	MS or AC (both academic and non-academic)	Outgoing phase (mandatory): TC
						Secondment (optional): MS or AC
DURATION (months)		12 to 24	12 to 36	12 to 24	12 to 24	12 to 24 + 12
SCIENTIFIC AREAS		8	8	8	8	8
NUMBER OF RANKING LISTS		8	1	1	1	8
BUDGET (total EUR 273 million)		EUR 220 million			EUR 8 million	EUR 45 million

Additionally, a budget of EUR 5 million is reserved for the Widening Fellowships (WF). See dedicated section in this guide for eligibility conditions.

Annex 2 – Further information and help

Guide du candidat 2017	Guide du candidat 2018
<p>p.46-47 : The Participant Portal call page contains links to other sources that you may find useful in preparing and submitting your proposal. Direct links are also given where applicable.</p> <p>Call Information</p> <ul style="list-style-type: none"> Participant Portal call page MSCA Work Programme 2016 - 17 <p>[...]</p> <p>Other Useful Reference Documents</p> <ul style="list-style-type: none"> Horizon 2020 Work Programme 2016-2017: General Introduction Horizon 2020 Work Programme: General Annexes List of countries and applicable rules for funding Horizon 2020: Reference Documents in the Participant Portal Horizon 2020: Rules for Participation Horizon 2020: How to Complete Your Ethics Self-Assessment Horizon 2020: Guidelines on Data Management in Horizon 2020 Guide on beneficiary registration, validation and financial viability check European Charter and Code for Researchers List of associated countries Fact Sheet IP management in Horizon 2020 Marie Skłodowska-Curie Actions Proposal evaluation forms Model Grant Agreement and its annotated version Grants Manual - Section on: Proposal submission and evaluation 	<p>p.46 : The Participant Portal call page contains links to other sources that you may find useful in preparing and submitting your proposal. Direct links are also given where applicable.</p> <p>Call Information</p> <ul style="list-style-type: none"> Participant Portal call page MSCA Work Programme 2018 - 20 <p>[...]</p> <p>Other Useful Reference Documents</p> <ul style="list-style-type: none"> Horizon 2020 Work Programme 2018-2020: General Introduction Horizon 2020 Work Programme: General Annexes Horizon 2020: Reference Documents in the Participant Portal Horizon 2020: Rules for Participation Horizon 2020: How to Complete Your Ethics Self-Assessment Horizon 2020: Guidelines to the Rules on Open Access to Scientific Publications and Open Access to Research Data in Horizon 2020 Horizon 2020: Guidelines on FAIR Data Management in Horizon 2020 Guide on beneficiary registration, validation and financial viability check European Charter and Code for Researchers List of associated countries Fact Sheet IP management in Horizon 2020 Marie Skłodowska-Curie Actions Proposal evaluation forms (link forthcoming) Model Grant Agreement and its annotated version Grants Manual - Section on: Proposal submission and evaluation

Pour finir... (1/2)

Certains points ont été **réécrits**, il est donc fortement conseillé de les lire avec attention :

- ✓ **p.9-15** : « *3.1 European Fellowships (EF)* » et « *3.2 Global Fellowships (GF)* »
- ✓ **p.17** : « *5.3 Optional secondments* » → le contenu reste similaire (à l'exception des points slide 13) mais les phrases ont été réorganisées
- ✓ **p.21-22** : « *6.3 Budget calculation* » → les montants ont été mis à jour avec l'augmentation de la *living allowance*
- ✓ **p.22** : Les points « *Conflicts of interest* » et « *Confidentiality* » ont été reformulés
- ✓ **p.27-28** : « *8. Proposal submission forms (part A of the proposal)* » + « Similar proposals »
- ✓ **p. 31-44** : « ***9.2 Template of part B of the proposal*** » → **Les parties B1 et B2 ont été modifiées et complétées** avec de nouveaux éléments :
 - **p.32** : le « *Career Development Plan* » a été déplacé du point 1.4 vers le point 1.2
 - **p.35** : précision sur le contenu du point 1.4 et du point 2.1 : le point 1.4 se concentre sur le potentiel du chercheur durant la bourse tandis que le point 2.1 se concentre sur l'impact après la bourse
 - nouveau modèle de Gantt Chart
 - **p.37** : il est exigé d'indiquer les dates complètes (jj/mm/aaaa), exactes et dans l'ordre chronologique (« *professional experience* » et « *education* » pour toute information fournie)
 - **p.39** : la « *list of participating organisations* » a été basculée en annexe
 - **p.40** : le tableau « *Capacity of the participating organisations* » a été modifié afin de prendre en compte tous les rôles possibles

Pour finir... (1/2)

Les nouveautés à ne pas rater :



- ✓ p.15-16 : « 4. Widening Fellowships (WF) »
- ✓ p.25-26 : « Overview of the evaluation process »
- ✓ p.43 : Nouveau questionnaire sur l'éthique
- ✓ p.44 : « MSCA Special needs allowance »
- ✓ p.47-52 : « Annex 3 – How to complete the Proposal Submission Forms (Part A) of the proposal »

En outre :

- ✓ Le tableau « Summary » à la page 15 du Guide 2017 a été décalé à la page 45 du Guide 2018 (« Annex 1 – Overview of the actions »).
- ✓ Le passage « Scientific Misconduct and Research Integrity » à la page 23 du Guide 2017 a été décalé à la page 27 du Guide 2018.

Attention !

- ✓ Il y a une erreur à la page 38 du Guide (validée par la Commission européenne), dans l'alinéa 23 :
 - Phrase actuelle : *Please count only time spent until the IF 2017 call deadline (14/09/2017) or the end of the PhD, whichever comes first*
 - Il faut lire : *Please count only time spent until the IF 2018 call deadline (12/09/2018) or the end of the PhD, whichever comes first*