

Retour d'expérience EXPERT H2020-MSCA IF

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Profil et expérience d'expertise CEE

Depuis 2007 (FP7, H2020)

- ✓ Différents programmes / différents appels
FET-Open, FET Proactive,
Marie-Curie: ITN, IF
Autres: SME, ..
- ✓ Différents rôles:
Evaluation, Monitoring, Vice-Chair
- ✓ Domaine:
Mathematics (MAT) & Information Science and Engineering

Marie Skłodowska-Curie Individual Fellowship (MSCA-IF)

ELIGIBILITY & EVALUATION CRITERIA

Extraits des documents de « Briefing des Experts: 2015 »

Chercheurs ayant un Doctorat ou au moins 4 ans d'expérience en recherche

INDIVIDUAL FELLOWSHIPS		EUROPEAN	GLOBAL		
EXPERIENCED RESEARCHERS	Nationality	2 grandes catégories			
	Mobility				
	Career break in research				
PARTICIPANTS	Beneficiary				
	Partner Organisation				
DURATION (months)					
SCIENTIFIC PANELS/AREAS					
NUMBER OF RANKING LISTS					
BUDGET: €215 million				€ 188 million	€ 27 million

Chercheurs ayant un Doctorat ou au moins 4 ans d'expérience en recherche

INDIVIDUAL FELLOWSHIPS		EUROPEAN			GLOBAL
		Standard EF	CAR	RI	
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	<i>MS, AC or long-term residents</i>	
	Mobility	<i>From ANY country to MS or AC</i>	<i>From ANY country to MS or AC</i>	<i>From TC to MS or AC</i>	
		<i>< 12 months in the last 3 years</i>	<i>< 36 months in the last 5 years</i>	<i>< 36 months in the last 5 years</i>	
	Career break in research	-	≥ 12 months prior to call deadline	-	
PARTICIPANTS	Beneficiary	MS or AC	MS or AC	MS or AC	
	Partner Organisation	MS or AC (optional secondments)	MS or AC (optional secondments)	MS or AC (optional secondments)	
DURATION (months)		12 - 24	12 - 24	12 - 24	
SCIENTIFIC PANELS/AREAS		8 panels	8 areas Multidisciplinary panel	8 areas	
NUMBER OF RANKING LISTS		8	1	1	
BUDGET: €215 million		€ 188 million			€ 27 million

Chercheurs ayant un Doctorat ou au moins 4 ans d'expérience en recherche

INDIVIDUAL FELLOWSHIPS		EUROPEAN			GLOBAL
		Standard FF	CAR	PT	GF
EXPERIENCED RESEARCHERS	Nationality				<i>MS, AC or long-term residents</i>
	Mobility				<i>From ANY country to TC then MS/AC</i>
	Career break in research				<i>< 12 months in the last 3 years</i>
PARTICIPANTS	Beneficiary				<i>-</i>
	Partner Organisation				<i>MS or AC</i>
DURATION (months)					<i>TC (outgoing phase)</i>
SCIENTIFIC PANELS/AREAS					<i>MS or AC (op. secondments)</i>
NUMBER OF RANKING LISTS					<i>12 to 24 + 12</i>
BUDGET: €215 million					<i>8 panels</i>
					<i>8</i>
		€ 188 million			
		€ 27 million			

IF 2015: Overview

Panel	CAR	GF	RI	ST	Grand Total
CHE	18	78	50	860	1006
ECO	8	22	13	163	206
ENG	16	148	72	801	1037
ENV	28	157	62	823	1070
LIF	54	253	208	1823	2338
MAT		20	12	160	192
PHY	10	85	65	811	971
SOC	57	241	84	1312	1694
Grand Total	191	1004	566	6753	8514

MATENG Panel : quelques chiffres

Submitted	Transfer from CAR/RI to ST	Transfer from ST to GF	Ineligible/ Inadmissible	Total Eligible	Withdrawn	TOTAL Evaluated
1229	5	1	13	1216	8	1208

- **1 Chair**
- **23 Vice-Chairs**
- **198 Evaluators**

- **IER tasks/evaluator: 17 – 21 proposals (average 18.5)**
- **Rapporteur tasks/evaluator: 5-8 proposals (average 6.1)**
- **8-9 experts/VC**

Roles: who does what?

Evaluators

- Evaluate proposals in a **fair** and **independent** way
- Participate in Consensus Meetings and approve Consensus Reports
- Act as Rapporteurs for a share of proposals
 - Lead Consensus Meetings
 - Submit Consensus Report

(Vice-)Chairpersons (CVC)

- Assist the REA in the evaluation management
- Do not evaluate proposals
- Perform quality checking of Consensus Reports
- Attend consensus meetings when needed (resubmission cases etc)

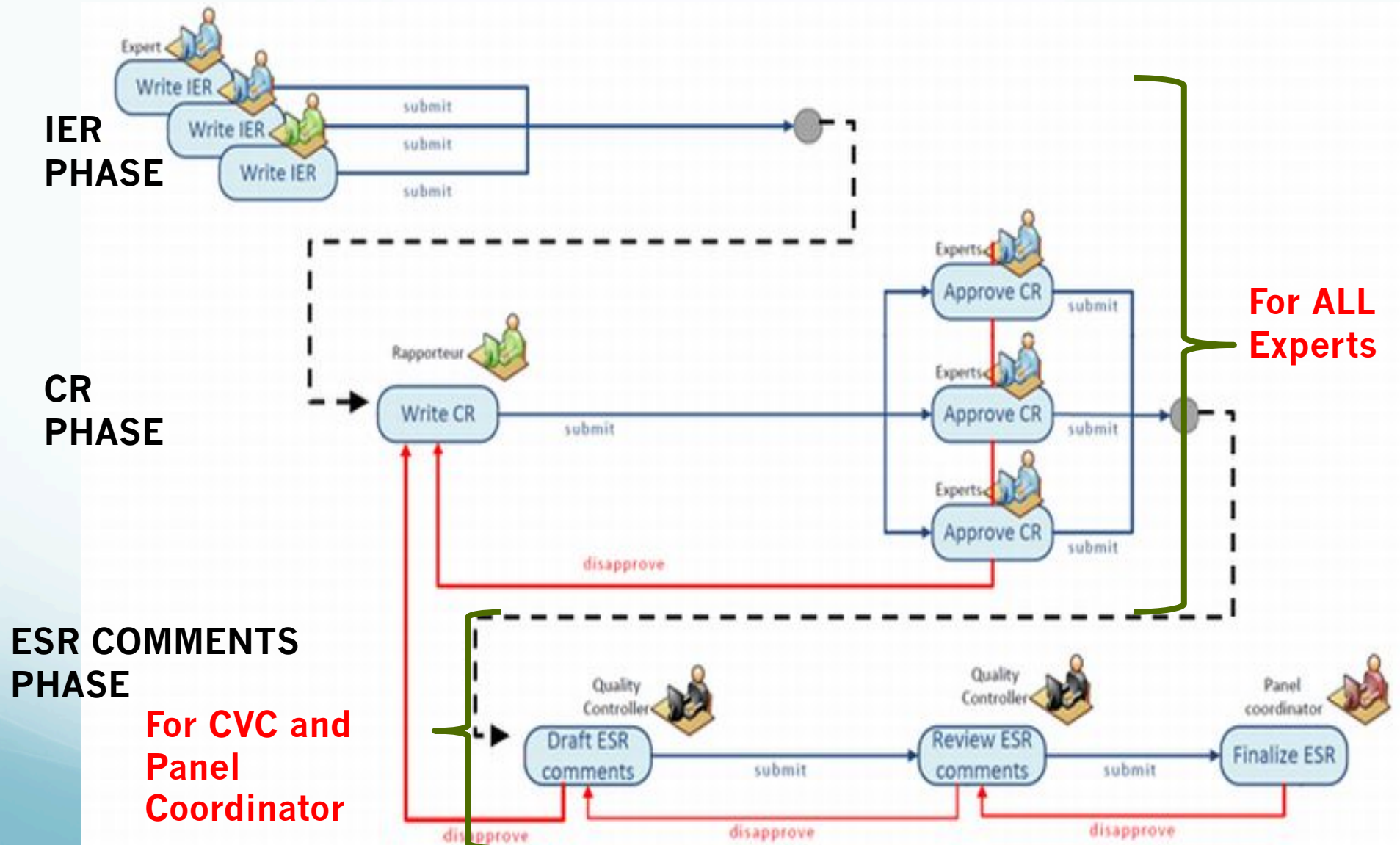
Observer

- Observe the evaluation process
- Provide advice / improvement suggestions to the REA

REA Staff (Panel Coordinator and Project Officers)

- Ensure evaluation rules are respected
- Provide advice to experts for a quality and timely completion of evaluation

Workflow Overview



IF – Structure of Part B

LIST OF PARTICIPANTS

START PAGE COUNT.....

- 1. EXCELLENCE
 - 2. IMPACT
 - 3. IMPLEMENTATION
- MAX 10 pages

STOP PAGE COUNT.....

- 4. CV OF THE EXPERIENCED RESEARCHER (max 5 pages)
- 5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS (max 1 page for the Beneficiary; max 0.5 page for Partner Organisation in the GF)
- 6. ETHICAL ASPECTS
- 7. LETTERS OF COMMITMENT OF PARTNER ORGANISATIONS (only for GF)

IF – Evaluation criteria

Overview of evaluation criteria

Evaluation Criterion	Threshold	Weight	Priority if ex-aequo
Excellence	n/a	50%	1
Impact	n/a	30%	2
Implementation	n/a	20%	3
Total	70%		

Full scoring scale

Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Very Good. The proposal addresses the criterion very well, but a small number of shortcomings are present.

Good. The proposal addresses the criterion well, but a number of shortcomings are present.

Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.

Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.

The proposal **fails** to address the criterion or cannot be assessed due to missing or incomplete information.

5

Excellent

4

Very Good

3

Good

2

Fair

1

Poor

0

4.9
↑
↓
4.0

3.9
↑
↓
3.0

2.9
↑
↓
2.0

1.9
↑
↓
1.0

IF – Evaluation criteria

Excellence	Impact	Implementation
<p>Quality, innovative aspects and credibility of the research (including inter/multidisciplinary aspects)</p>	<p>Enhancing research- and innovation-related human resources, skills and working conditions to realise the potential of individuals and to provide new career perspectives</p>	<p>Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources</p>
<p>Clarity and quality of transfer of knowledge/training for the development of researcher in light of the research objectives</p>	<p>Effectiveness of the proposed measures for communication and results dissemination</p>	<p>Appropriateness of the management structures and procedures, including quality management and risk management</p>
<p>Quality of the supervision and the hosting arrangements</p>		<p>Appropriateness of the institutional environment (infrastructure)</p>
<p>Capacity of the researcher to reach or re-enforce a position of professional maturity in research</p>		<p>Competences, experience and complementarity of the participating organisations and institutional commitment</p>

IF – Evaluation criteria

Répondre à chaque sous-critère !

Excellence	Impact	Implementation
<p>Quality, innovative aspects and credibility of the research (including inter/multidisciplinary aspects)</p>	<p>Enhancing research- and innovation-related human resources, skills and working conditions to realise the potential of individuals and to provide new career perspectives</p>	<p>Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources</p>
<p>Clarity and quality of transfer of knowledge/training for the development of researcher in light of the research objectives</p>	<p>Effectiveness of the proposed measures for communication and results dissemination</p>	<p>Appropriateness of the management structures and procedures, including quality management and risk management</p>
<p>Quality of the supervision and the hosting arrangements</p>		<p>Appropriateness of the institutional environment (infrastructure)</p>
<p>Capacity of the researcher to reach or re-enforce a position of professional maturity in research</p>		<p>Competences, experience and complementarity of the participating organisations and institutional commitment</p>

Important Clarifications for Evaluation Criteria

Criterion Excellence/Sub-criterion 2

- Two way transfer of knowledge:
 - i) From the host to the researcher:** new skills and knowledge that planned to be acquired during the fellowship
 - ii) From the researcher to the host:** knowledge and skills previously acquired
- When assessing this subcriterion, consider the researcher's level of research experience
- For Global Fellowships: assess how the new skills and knowledge acquired in the Third Country will be transferred back to the host institution in Europe

Important Clarifications for Evaluation Criteria

Criterion Impact/Sub-criterion 1

- You should assess:
 - the expected impact to increase career prospects for the Experienced Researcher
 - to what extent competences acquired during the fellowship, including any secondments, increase the impact of the researcher's future activity on European society
- However, the main focus and attention should be on the impact of the project on the career of the researcher and not on the researcher's activity on European society

CV of the Experienced Researcher

The CV is essential to the evaluation of the whole proposal and is assessed throughout the 3 evaluation criteria.

Please take into account the researchers' track record in relation to their level of experience.

Operational Capacity check

You have to confirm whether participants have the basic operational capacity to carry out the project by looking at the information in the proposal, in particular to the table on capacity of the participating organisations

- Does each host institution have appropriate premises to host researchers (not just "access to" equipment)?
- Does each host institution have appropriate staff resources to supervise/train researcher?

Yes or no decision!

BRIEFING: QUALITY OF CR REPORTS

*PANEL: Mathematics (MAT) & Information Science and Engineering
(ENG)*

Cristina SORIANI

CR Phase – Consensus Meeting

In the Consensus meeting the experts agree on:

- ✓ the strengths and weaknesses for the 3 evaluation criteria.
- ✓ the **final score** for each criterion that is **consistent the comments**.



Guidance on writing good comments

Ensure comments:

- Are consistent with the score, taking into account the proposal's strengths and weaknesses
- Are related to the (sub)criterion in question
- Judge the proposal, they don't summarise it
- Express facts, not opinions
- Are clear, substantial, precise and final
- Are of adequate length: not just one sentence, not a booklet!

Avoid comments that:

- Can be perceived as inappropriate or discriminatory
- Include statements not properly verified
- Include recommendations

Interpretation of scores

Full scoring scale consistent with the comments

Excellent. The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.

Very Good. The proposal addresses the criterion very well, but a small number of shortcomings are present.

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3.0

2.9
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2.0

1.9
↑
↓
1.0

Pay attention to differences between ST/CAR/RI/GF



- The evaluation criteria are the same for ST/CAR/RI/GF.
- The comments in the reports must be consistent with the requirements and objectives of the different actions (ST/CAR/RI/GF)
- Don't penalize CAR fellows for career break in research.
- Check that GF have a **valid letter of commitment** from partner organization in third country (headed or stamped, signed, up to date)



Do not compare proposals across different actions.

Final check

- Are scores consistent with comments?
- Comments of adequate length?
- Are issues requiring special attention highlighted?
- Operational capacity confirmed?
- No factual errors!
- Spelling mistakes
- No discriminatory/inappropriate comments!
- No comments under "Remarks", except for resubmission cases and comments about exceeding the 10-page limit





Merci

Questions?

Resubmission Procedure

- 121 resubmission proposals in MATENG
- Evaluators will be given access to the previous ESR (VC or PO brings the ESR to the consensus meeting and ensures that there are no major contradictions between the two documents)
- The Rapporteur adds the following sentence under "REMARKS" in the CR: *"This proposal was declared as a resubmission from IF-2014. During the consensus stage of the evaluation, evaluators were given access to the previous evaluation summary report."*

Conflict of interest (CoI)

- was involved in the preparation of the proposal
- stands to benefit directly or indirectly if the proposal is accepted
- has a close family or personal relationship with any person representing an applicant legal entity
- is a director, trustee or partner or is in any way involved in the management of an applicant legal entity
- is employed or contracted by one of the applicant legal entities or any named subcontractors

Experts with a COI shall not evaluate the relevant proposal but may participate in the evaluation

Aware of CoI? You must immediately inform REA

Confidentiality obligation



Experts must **not** disclose:

- confidential information on proposals / applicants
- any detail on evaluation process and its outcomes
- names of other experts involved.

No communication with applicants during /after evaluation.

Return / erase confidential documents.