H2020 Programme

Guide for Applicants

Marie Skłodowska-Curie Actions Individual Fellowships (IF)

Version 1.5
19 May 2017

Disclaimer
This guide aims to facilitate potential applicants. It is provided for information purposes only and is not intended to replace consultation of any applicable legal sources. Neither the European Commission nor the Research Executive Agency (or any person acting on their behalf) can be held responsible for the use made of this guidance document. The guidance provided in the Annotated Model Grant Agreement shall prevail in case of discrepancies.

HISTORY OF CHANGES			
Version	**Publication Date**	**Change**	**Page**
1.0	12.04.2016	▪ Initial version	
1.1	10.06.2016	▪ clarification in the definition of mobility for Global Fellowships ▪ deleted references to the Unique Registration Facilities ▪ definition has been added and example deleted for SE Panel ▪ added paragraph in section 1.4 (reference to CV) ▪ hyperlinks have been embedded in the text (where relevant)	1 8 13 43
1.2	26.07.2016	▪ Added words about long-term residence (assimilation rule) ▪ Change in reference to the new 2016-2017 H2020 Work Programme ▪ New rule for entities with legal and capital link to the beneficiary ▪ New rule for additional employment contracts ▪ Added words about the mobility rule ▪ Change in the IF budget ▪ Outcome of previous evaluations	4 5,30 7, 8 8 16 27,29 37
1.3	28.07.2016	▪ Change in reference to the new Model Grant Agreement version 3	23
1.4	11.04.2017	▪ Structural change of the guide to increase readability ▪ Update of definition of long term residency to include refugee status ▪ Clarification added on academic and non-academic status ▪ Clarification added on SE panel eligibility conditions ▪ Clarification added on secondments ▪ Clarification added on dissemination and communication ▪ Descriptors	 3 3 11- 15- 34 47
1.5	19.05.2017	▪ Clarification on transfer of SE proposals	13

Note:
National Contact Points (NCPs) have been set up across Europe by the national governments to provide information and personalised support to H2020 applicants in their native language. The mission of the NCPs is to raise awareness, inform and advise on H2020 funding opportunities as well as to support potential applicants in the *preparation, submission and follow-up* of the grant applications. For details on the NCP in your country please consult the National Contact Points page. Additionally, you may also consult the website of the EU-funded Network of MSCA NCPs.

CONTENTS

DEFINITIONS

Europe: EU Member States **(MS)** and their overseas departments (including Overseas Countries and Territories **(OCT)** linked to MS) and Associated Countries **(AC).**

Associated Country (AC) is a third country which is party to an international agreement with the Union, as identified in Article 7 of Regulation (EU) No 1291/2013. The full list is available here.

Non-associated Third Countries (TC) are countries which are neither EU Member States (MS), nor associated to Horizon 2020 (AC)[1].

The **academic sector** are public or private higher education establishments awarding academic degrees, public or private non-profit research institutes whose primary mission is to pursue research, and international European interest organisations, as defined in Article 2.1(12) of the Horizon 2020 Rules for Participation Regulation No. 1290/2013.

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).

The **beneficiary** is the legal entity that signs the Grant Agreement and has the complete responsibility for the proper implementation of the action. It contributes directly to the implementation of the research, transfer of knowledge and training activities by recruiting, supervising, hosting or training a MSCA-funded researcher.

The **partner organisations** contribute to the implementation of the action, but do not sign the Grant Agreement.

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.

Full-Time Equivalent Research Experience is measured from the date when a researcher obtained the degree entitling him/her to embark on a doctorate, either in the country in which the degree was obtained or in the country in which the researcher is recruited, even if a doctorate was never started or envisaged.

The **Supervisor** is the scientist appointed at the beneficiary to supervise the researcher throughout the whole duration of the action.

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.

The Marie Skłodowska-Curie Actions **Work Programme**[2] provides the legal basis for this call for proposals.

[1] The full list of countries eligible for funding can be consulted in the General annex A to the Work Programme
[2] European Commission Decision C(2016)4614 of 25 July 2016

1. BUDGET, TIMETABLE, AND HOW TO SUBMIT

The Marie Skłodowska-Curie actions (MSCA) aim to support the career development and training of researchers in all scientific disciplines through international and intersectoral mobility.

By funding excellent research and providing attractive working conditions, the MSCA offer high quality professional opportunities open to researchers of any age, nationality or discipline.

All MSCA have **a bottom-up approach**, i.e. research fields are chosen freely by the applicants. All domains of research and technological development are eligible for funding (except areas of research covered by the EURATOM Treaty).

The goal of the Individual Fellowships is to enhance the creative and innovative potential of experienced researchers, wishing to diversify their individual competence in terms of skill acquisition through advanced training, international and intersectoral mobility.

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.

This Guide is based on the rules and conditions contained in the legal documents relating to Horizon 2020 (in particular the Horizon 2020 Framework Programme and Specific Programme, Rules for Participation, and the Work Programme), all of which can be consulted via the Participant Portal.

1.1 INDICATIVE BUDGET

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.

1.2 INDICATIVE TIMETABLE

Publication of call	*11 April 2017*
Deadline for submission of proposals	*14 September 2017 at 17:00:00, Brussels local time*

Evaluation of proposals	*October - December 2017*
Information on the outcome of the evaluation	*February 2018*
Indicative date for the signature of Grant Agreements	*March - May 2018*

1.3 PROPOSAL SUBMISSION

Proposals must be submitted exclusively electronically, using the **European Commission's Online Submission Service (SEP) accessible via the Participant Portal**.

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.

Proposals can be submitted by the researcher. However, the **submission of the proposal** (and other actions that follow this procedure such as withdrawal) falls under the **final responsibility** of the applicant organisation, represented by the main supervisor.

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.

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.

A complaint will only be successful if the IT audit trail shows that there was a technical problem (at the EC side) which prevented submission[3].

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:

- In case no reply is received, the first submitted proposal will be evaluated.

- In case of disagreement between supervisor and researcher, the supervisor's opinion prevails.

Any other submitted proposals involving the same researcher will not be evaluated.

3 As mentioned in the Grants Manual - Section on Lodging A Complaint About Failed Submission

2. PARTICIPATING ORGANISATIONS

2.1. PARTICIPANT IDENTIFICATION CODE

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 past[4] 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.

2.2. BENEFICIARY

The beneficiary (See Definitions) is the **host organisation located in a MS or AC** that recruits the experienced researcher and ensures, through appointment of a supervisor, the necessary training of the researcher. The beneficiary signs the Grant Agreement, receives funding, claims costs, and takes complete responsibility for the proper implementation of the action.

Where necessary, the beneficiary may call upon *entities with a capital or legal link* to it[5] 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.
Entities with a capital or legal link must fulfil the same conditions for participation and funding as the beneficiary (for instance, be established in an EU Member State or H2020 associated country).

> Example: *A university clinical hospital depends on the regional health system and does not have legal personality of its own. The hospital has a foundation under its control and this foundation recruits researchers working at the university clinic. In this case, the foundation should apply as a beneficiary, describing the set-up and the competence of the university clinical hospital where the research training activities described in the proposal will be implemented.*

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).

[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 though the Participant Portal. Each participating organisation must submit documents regarding the nomination of the LEAR before a Grant Agreement can be signed.

[5] '**Entities with a capital or legal link**' are entities that have a link with the beneficiary, in particular, a legal or capital link, which is neither limited to the action nor established for the sole purpose of its implementation. See also MSCA-IF MGA ARTICLE 8 — RESOURCES TO IMPLEMENT THE ACTION — THIRD PARTIES INVOLVED IN THE ACTION of the Annotated Grant Agreement

International Organisations and International European Interest Organisation

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:

- The participation is deemed essential for carrying out the action by the Commission or the relevant funding body
- Such funding is provided for under a bilateral scientific and technological agreement or any other arrangement between the Union and the international organisation

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*".

For the purpose of the IF actions, IEIOs are considered as legal entities established in a MS or AC.

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).

2.3. PARTNER ORGANISATION

Partner organisations are -

- organisations in MS or AC that host the researcher during optional secondments and provide additional training.

or, and *uniquely* in the case of Global Fellowships -

- organisations in TC that host the researcher during the compulsory initial outgoing period and provide additional training.

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.

For GLOBAL FELLOWSHIPS only, the **Partner organisations located in TC**

- **must** include in Part B of the proposal an **up-to-date letter of commitment**[6] 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.

[6] For further information please see Section 7 of Part B Template

- **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.

> *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).*

2.4. OBLIGATIONS OF PARTICIPATING ORGANISATIONS[7]

The European Commission policy towards researchers involves the improvement of their working and living conditions and the promotion of mobility in order to open up new perspectives for research careers in Europe. The MSCA aim to act as a catalyst in this respect. 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).

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.

3. TYPES OF INDIVIDUAL FELLOWSHIPS AND ELIGIBILITY CONDITIONS

Proposals for IF involve a *single* beneficiary located in a MS or AC.

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:

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

[7] For detailed information, see "Article 32 – Recruitment and working conditions for the recruited researcher" of the grant agreement

Proposals will be evaluated in the selected scientific area, in order to have an optimal expert allocation.

In Standard European Fellowships and Global Fellowships, the selection of the scientific area will also determine the list in which the proposal will be ranked.

3.1. EUROPEAN FELLOWSHIPS (EF)

Standard European Fellowships (EF-ST)

1. The researcher must be an **experienced researcher** as described under Definitions.
2. The researcher may be of **any nationality**. No age restrictions apply.
3. The researcher must **move or have moved** (transnational mobility) **from any country to the MS or AC** where the beneficiary is located.

   The researcher must comply with the **mobility rule:**

   The researcher must not have resided or carried out his/her main activity (work, studies, etc.) in the country of the beneficiary for more than 12 months in the 3 years immediately before the call deadline.

   Short stays (such as holidays), compulsory national service (such as mandatory military service), and time spent on procedures for obtaining refugee status[8] are not counted.

   As for beneficiaries that are international European interest organisations (IEIO) or international organisations located in a MS or an AC, the experienced researcher must not have spent more than 12 months in the 3 years immediately before the call deadline in the same appointing organisation.

In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested after the call deadline.

Career Restart Panel (EF-CAR)

The Career Restart Panel (CAR) is a multidisciplinary panel of the EF which provides financial support to individual researchers who wish to resume research in Europe after a career break (e.g. after parental leave, working outside research, etc.).

1. The researcher must be **an experienced researcher** as described under Definitions.
2. The researcher may be of **any nationality**. No age restrictions apply.
3. The researcher must **move or have moved** (transnational mobility) **from any country to the MS or AC** where the beneficiary is located.

   The researcher must comply with the **CAR mobility rule:**

   The researcher must not have resided or carried out the main activity (work,

[8] As defined under the Geneva Convention (1951 Refugee Convention and the 1967 Protocol

studies, etc.) in the country of the beneficiary for more than 36 months in the 5 years immediately before the call deadline.

Short stays (such as holidays), compulsory national service (such as mandatory military service), and time spent on procedures for obtaining refugee status[9] are not counted.

As for beneficiaries that are international European interest organisations (IEIO) or international organisations located in a MS or an AC, the experienced researcher must not have spent more than 36 months in the 5 years immediately before the call deadline in the same appointing organisation.

4. The experienced researcher must have had a **career break in research**, i.e. they **must not have been active in research** for at least 12 months immediately prior to the deadline for submission of proposals (corresponding to the period 15 September 2016 to 14 September 2017).

Whether or not the researcher has been active in research is determined on the basis of fellowships or employment contracts in the domain of research.

The professional status confirming the eligibility (e.g. unemployment, parental or sick leave, no fellowship or no employment contract in the domain of research) of the researcher during the period 15 September 2016 to 14 September 2017 must be clearly explained in the proposal, both in part A[10] and B[11].

Publication activities or mere association to a university are not taken into account to determine the career research break. *Mere association* is any other link to the university that is not considered as an employment contract or a fellowship agreement.

Example of 'mere association': *the researcher is allowed to use the facilities of the university; he/she is sent to a conference by or on behalf of the university; or is enrolled in a bachelor's/master's or other non-research related degree at the university.*

After the call deadline, EF-CAR proposals not complying with the EF-CAR eligibility conditions but complying with the conditions for EF-ST will be automatically transferred to the EF-ST panel.

In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested after the call deadline.

Reintegration Panel (EF-RI)

The Reintegration Panel is a multidisciplinary panel of the European Fellowships dedicated to researchers who wish to return and reintegrate in a longer term research position in Europe.

[9] As defined under the Geneva Convention (1951 Refugee Convention and the 1967 Protocol
[10] Section 5 - Call specific questions, question 2: *Were you out of research for a certain period until the call deadline?*
[11] Section 4 - CV OF EXPERIENCED RESEARCHER

1. The researcher must be an **experienced researcher** as described under Definitions.

2. The researcher must be a **national or long-term resident of a MS or AC** as described under Definitions. No age restrictions apply.

3. The researcher must **move or have moved** (transnational mobility) **directly from a TC** (excluding compulsory national service and/or short stays such as holidays) **to the MS or AC where the beneficiary is located**. In absence of a direct move from the TC, the proposal will not be eligible as EF-RI.

   The researcher must comply with the **RI mobility rule:**

   The researcher must not have resided or carried out the main activity (work, studies, etc.) in the country of the beneficiary for more than 36 months in the 5 years immediately before the call deadline.

   Example of 'direct mobility': the researcher has worked in the United States for the past year. He moved back to Portugal three months ago and submits a proposal with a Portuguese host. The proposal is eligible.

   Example of 'indirect mobility': the researcher has worked in the United States for the past year. He moved back to Portugal three months ago and submits a proposal with a German host. The proposal is *not* eligible.

   Short stays (such as holidays), compulsory national service (such as mandatory military service), and time spent on procedures for obtaining refugee status[12] are not counted.

   As for beneficiaries that are international European interest organisations (IEIO) or international organisations located in a MS or an AC, the experienced researcher must not have spent more than 36 months in the 5 years immediately before the call deadline in the same appointing organisation.

   Example of 'direct mobility': the researcher has worked in South Africa for the past year. She moved to an IEIO located in France six months ago and submits a proposal with a host, which is the same IEIO. She has not worked in that IEIO for more than 36 months in the last 5 years. The proposal is eligible.

After the call deadline, EF-RI proposals not complying with the RI eligibility conditions but complying with the EF-ST ones will be automatically transferred to the corresponding EF-ST Panel.

In case of doubts about the eligibility of the researchers, submission of documentary evidence may be requested after the call deadline.

Society & Enterprise Panel (EF-SE)

The Society & Enterprise Panel is a multidisciplinary panel of the European Fellowships dedicated to career opportunities for researchers seeking to work on research and innovation projects in an organisation from the non-academic sector.

1. The researcher must be **an experienced researcher** as described under Definitions.

[12] As defined under the Geneva Convention (1951 Refugee Convention and the 1967 Protocol

2. The researcher may be of **any nationality**. No age restrictions apply.

3. The researcher must **move or have moved** (transnational mobility) **from any country to the MS or AC** where the beneficiary is located.

   The researcher must comply with the **SE mobility rule:**

   The researcher must not have resided or carried out the main activity (work, studies, etc.) in the country of the beneficiary for more than 36 months in the 5 years immediately before the call deadline.

   Short stays (such as holidays), compulsory national service (such as mandatory military service), and time spent on procedures for obtaining refugee status[13] are not counted.

   As for beneficiaries that are international organisations located in a MS or an AC, the experienced researcher must not have spent more than 36 months in the 5 years immediately before the call deadline in the same appointing organisation.

4. **The beneficiary** must be an entity from the **non-academic sector** as described under Definitions.

   The non-academic status is assigned to entities ***not*** having the academic status, i.e. **entities which are not**:

   1. Public or private higher education establishments awarding academic degrees

   2. Public or private non-profit research institutes whose primary mission is to pursue research

   3. International European interest organisations

EF-ST/CAR/RI proposals with a beneficiary having a non-academic status will be transferred to the EF-SE Panel, if this would increase the chance of funding for the non-academic applicants.

The status of the organisation and the decision to transfer proposals is ultimately determined by the legal validation of the entity, which takes place if the entity is invited to start the Grant Agreement Preparation. It is therefore important that entities considering themselves to be non-academic apply from the beginning for the EF-SE panel.

EF-SE proposals with a beneficiary having an academic status will be transferred to the EF-ST Panel.

If the non-academic status of an EF_SE proposal is not confirmed by the validation services at the moment of the Grant Agreement Preparation, the proposal will be transferred to another EF panel under which the academic status is permitted. This might imply that the invitation for the Grant Agreement Preparation is withdrawn, because the proposal does not meet the score to be funded or the eligibility requirements for this panel.

In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested after the call deadline.

[13] As defined under the Geneva Convention (1951 Refugee Convention and the 1967 Protocol)

3.2. GLOBAL FELLOWSHIPS (GF)

Global Fellowships are composed of an **outgoing phase** during which the researcher undertakes mobility to a **partner organisation** in a **TC for a period of between 12 and 24 months,** followed by a **mandatory 12-month return period** to **the beneficiary** located in a **MS or AC.**

1. The researcher must be an **experienced researcher** as described under Definitions**.**

2. The researcher must be **national or long-term resident of a MS or AC** as described under Definitions. No age restrictions apply.

3. The researcher must **move or have moved** (transnational mobility) **from any country** to the partner organisation located in the **TC**.

The researcher must comply with the **GF mobility rule**:

The researcher must not have resided or carried out their main activity (work, studies, etc.) in the country of the TC partner organisation where the initial outgoing phase takes place for more than 12 months in the 3 years immediately before the call deadline.

Short stays (such as holidays), compulsory national service (such as mandatory military service), and time spent on procedures for obtaining refugee status[14] are not counted.

As for international organisations located in a TC, the experienced researcher must not have spent more than 12 months in the 3 years immediately before the call deadline at the same partner organisation.

4. a. **The beneficiary must be located in an MS or AC**, and,

b. **The partner organisation for the initial outgoing phase** must be situated in a **TC** and is the entity where the initial outgoing phase takes place.

The partner organisation in a TC must **include a letter of commitment complying with the minimum requirements defined in section 7 of Part B2 of the proposal** to ensure its real and active participation in the proposed action, and its precise role should also be clearly described in the proposal. In case of a missing letter of commitment the proposal will be declared inadmissible.

In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested after the call deadline.

The mandatory return phase for the experienced researcher in the European host organisation (the beneficiary) is essential for the successful achievement of the objectives of this action.

In case of non-fulfilment of this condition, the REA may ask the beneficiary to reimburse the total amount received for the benefit of the researcher under the Grant Agreement.

For all types of action the beneficiary must check the information regarding the eligibility of the experienced researcher at the call deadline *(i.e. diploma, research experience, career break, residency, mobility, family status, etc.).*

[14] As defined under the Geneva Convention (1951 Refugee Convention and the 1967 Protocol

3.3. Summary

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

4. ADDITIONAL INFORMATION ON DURATION OF FELLOWSHIPS, MOBILITY AND SECONDMENTS

4.1 DURATION OF FELLOWSHIPS

The duration for European Fellowships (ST, CAR, RI, and SE) is between 12 and 24 months.

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.

4.2. MOBILITY

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.
Mobility of the researcher to another country is an eligibility criterion for receiving MSCA funding, while mobility between the academic and non-academic sector is also encouraged as this would further advance research or innovation.
Please note that the MSCA mobility rules do not necessarily relate to the location(s) stated in the current or previous employment contract(s) of the researcher. It is the actual location(s) of residence that are taken into account, not the country(ies) of legal residence. **The two determining elements are the actual physical place of residence and place of main activity**.

In case of doubts about the eligibility of the researcher, submission of documentary evidence may be requested, after the call deadline.

4.3. OPTIONAL SECONDMENTS

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. The applicants should therefore consider carefully whether the research would be advanced by a secondment, and whether it should take place in the academic or non-academic sector.

If the partner organisation where the secondment takes place is not identified at the proposal stage, it is essential that Part B of the proposal contains as much information as possible on the sector, place, timing and duration, and its overall purpose.

Entities with a capital or legal link can NOT host secondments.

Any secondment must be clearly specified in Section 5 of Part B of the proposal, and justified where relevant in the other sections of the Part B. However, no Letter of Commitment is required.

The maximum duration of secondments is defined according to the total duration of the fellowship:

Duration of the fellowship	Maximum duration of secondment
≤ 18 months	3 months
> 18 months	6 months

The secondment phase can be a single period or can be divided into shorter mobility periods. It can take place at one or more organisations, which can be located in the same country as the beneficiary. 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 phase[15].

Secondments can take place within the same sector. However, for certain fields of research, inter-sectoral secondments may increase the impact of the proposal.

The quality and degree of involvement of partner organisations and the impact of the secondments will be assessed by the expert evaluators according to the evaluation criteria. In all cases **the secondment must be meaningful and appropriate to the type of fellowship and research field**.

It is essential for the applicants to clearly **distinguish "secondments" from short visits** (for example for field work) since they have a different nature and pursue different objectives. A short visit is not a "secondment", and therefore the country where a short visit takes place can be chosen freely.

- Secondments are planned in advance, and are an integral part of the research proposal.
- Secondments imply mobility to a partner organisation in a MS or AC with specific supervision arrangements. Short visits imply mobility to another location outside the physical premises of the beneficiary. However, the work done is supervised directly by the beneficiary.
- Short visits can only represent a small part of the action.
- When a short visit to a TC takes place, the beneficiary shall ensure compliance with the applicable Horizon 2020 ethical framework and the corresponding provisions of the Grant Agreement.

Any secondments not complying with the above criteria, will be disregarded by the evaluators.

[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.

5. FINANCIAL ASPECTS

The financial support for Marie Skłodowska-Curie IF takes the form of a grant covering 100% of the action's eligible costs. These are not related to the real costs of the action, but are calculated exclusively based on the fixed units set out in the Work Programme.

Complete details regarding contractual obligations that bind all beneficiaries can be found in the model Grant Agreement and its annotated version, both available on the Participant Portal.

What types of monthly expenses are covered?

The European Union contribution and rates under this action are set out in Part 3 of the Work Programme 2016-2017 and cover:

- Living, mobility and family allowances for the researcher
- Research, training and networking costs
- Management and indirect costs

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

5.1. RESEARCHER ALLOWANCES

Living allowance and employment contract

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.

This amount is **adjusted** through the application of a **country correction coefficient** (CCC) for the cost of living according to the country in which the beneficiary is located. For the outgoing phase of the Global Fellowship, the country correction coefficient of the TC partner organisation will be applied. However, the adjusted amount will not change in case of secondments to a partner organisation in another MS or AC. The country correction coefficients that will be applied are indicated in Table 1 in Part 3 of the Work Programme (Marie Skłodowska-Curie actions).

Important notice on Living Allowance

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

The beneficiary must appoint the eligible experienced researcher under an **employment contract** or other direct contract with equivalent benefits, including social security coverage, for the duration of the action.

In the case of **secondments** to partner organisations, the social security provision should also cover the researcher during these periods.

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.

Mobility allowance

In addition to the living allowance, a mobility allowance will be paid to recruited researchers and amounts to **EUR 600 per month.**

Family allowance

A family allowance will be paid in case the researcher has family obligations. In this context, family is defined as **persons linked to the researcher**:

(i) by marriage

(ii) by a relationship with equivalent status to a marriage recognised by the legislation of the country or region where this relationship was formalised

(iii) as dependent children who are actually being maintained by the researcher

This allowance amounts to **EUR 500 per month.**

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.

Note on Mobility and Family allowances

The mobility and family allowances are fixed amounts, regardless of the country of recruitment, and are subject to the tax laws of the country of recruitment.

5.2. *INSTITUTIONAL UNIT COSTS*

Research, training and networking costs

This amounts to **EUR 800 per month** and is managed by the beneficiary to contribute to expenses related to, for example:

- the participation of researchers in training activities
- expenses related to research and networking costs

Management and indirect costs

This amounts to **EUR 650 per month**, which is to be used for the management and indirect costs of the action.

5.3. *BUDGET CALCULATION*

The EU contribution will be automatically calculated from the information provided in Part A of the proposal using the rates and coefficients given in Tables 1 and 2 of the Work Programme[16].

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.

Example - European Fellowship

A French researcher without family obligations who obtained his PhD in Chemistry in France on 15 June 2014 applies for an EF-ST jointly with a university in Germany for a 24-month fellowship in the CHE scientific area. During the last 3 years he was in Germany for 5 months. Part B provides for a secondment split in 2 periods of each 2 months at an industrial partner in Ireland.

BUDGET CALCULATOR IF-EF-2017					
Input	Do you have family obligations ?	Duration of Fellowship in Months	Country in which fellowship will take place, and its country correction coefficient (CCC)		
	No	24	Germany	98.80%	
Reference - Work Programme	Researcher Unit Cost (person/month)			Institutional Unit Cost (person/month)	
	Living allowance	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs
	EUR 4,650.00	*EUR 600.00*	*EUR 500.00*	*EUR 800.00*	*EUR 650.00*
	Researcher costs			Institutional costs	
	Living allowance	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs
YOUR APPLICATION	EUR 4,650.00 x 24 x CCC Germany = EUR 4,650.00 x 24 x 98.80%	EUR 600.00 x 24	n/a	EUR 800.00 x 24	EUR 650.00 x 24
	EUR 110,260.80	EUR 14,400.00	EUR 0.00	EUR 19,200.00	EUR 15,600.00
	EUR 124,660.80			EUR 34,800.00	
	EUR 159,460.80				

[16] A tool that gives an indication of the EU contribution based on the relevant data (e.g. country of the host institution, duration, etc.) is available in the section 'Topic Conditions and Documents' of the IF-2017 call in the Participant Portal.

Example - Global Fellowship

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. The researcher applies for a GF in the PHY scientific area with a 24-month outgoing phase to a university in the USA and a 12-month mandatory return period in Spain.

BUDGET CALCULATOR IF-GF-2017

	Do you have family obligations ?	Duration of Outgoing Fellowship in Months	Third Country in which the outgoing phase of the fellowship will take place, and its country correction coefficient (CCC)		Host Country in which the return phase of the fellowship will take place, and its country correction coefficient (CCC)	
Input	Yes	24 *plus 12 month mandatory return phase*	United States	99.40%	Spain	97.60%

	Researcher Unit Cost (person/month)			Institutional Unit Cost (person/month)	
Reference - Work Programme	Living allowance	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs
	EUR 4,650.00	*EUR 600.00*	*EUR 500.00*	*EUR 800.00*	*EUR 650.00*

		Researcher costs			Institutional costs		
		Living allowance	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs	*total per phase*
Your application	*Calculations*	EUR 4,650.00 x 24 x CCC United States = EUR 4,650.00 x 24 x 99.40%	EUR 600.00 x 24	EUR 500.00 x 24	EUR 800.00 x 24	EUR 650.00 x 24	
	Outgoing phase	EUR 110,930.40	EUR 14,400.00	EUR 12,000.00	EUR 19,200.00	EUR 15,600.00	*EUR 172,130.40*
	Calculations	EUR 4,650.00 x 12 x CCC Spain = EUR 4,650.00 x 12 x 97.60%	EUR 600.00 x 12	EUR 500.00 x 12	EUR 800.00 x 12	EUR 650.00 x 12	
	Return phase	EUR 54,460.80	EUR 7,200.00	EUR 6,000.00	EUR 9,600.00	EUR 7,800.00	*EUR 85,060.80*
	Total	EUR 204,991.20			EUR 52,200.00		
		EUR 257,191.20					

6. THE EVALUATION PROCESS

6.1. GENERAL

Proposals are submitted in a single stage and evaluated in one step. The evaluation of proposals is carried out by the Research Executive Agency with the assistance of independent experts.

REA staff ensures that the process is fair and in line with the principles contained in the Commission's rules on Proposal submission and evaluation and the relevant sections of the MSCA Work Programme.

Experts perform evaluations on a personal basis, not as representatives of their employer, their country or any other entity. They are required to be independent, impartial and objective, and to behave throughout in a professional manner. They sign an expert contract, including a declaration of confidentiality and absence of conflict of interest, before

beginning their work. Confidentiality rules must be adhered to at all times before, during and after the evaluation.

In addition, an **independent observer** will be appointed by the REA to observe and report on the evaluation process. The observer gives feedback and advice to the REA and the European Commission on the conduct and fairness of the evaluation sessions, on the way in which the experts apply the evaluation criteria, and on ways in which the procedures could be improved. The observer does not take part in the evaluation and will not express views on the proposals under examination or on the experts' opinions on the proposals.

Conflicts of interest: under the terms of the expert contract, all experts must declare beforehand any known conflicts of interest, and must immediately inform the responsible REA staff member if they detect a conflict of interest during the course of the evaluation.

Confidentiality: the expert contract also requires experts to maintain strict confidentiality with respect to the whole evaluation process. They must follow any instruction given by the REA to ensure this. Under no circumstance may an expert attempt to contact an applicant on his/her own account, either during the evaluation or afterwards.

6.2. ELIGIBILITY AND ADMISSIBILITY CHECK

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. Any documents received via any other means will not be taken into account.

Admissibility[17] and eligibility criteria for each proposal are checked by REA staff. 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.

To be considered admissible, a proposal/application must be:

(a) submitted in the electronic submission system before the deadline given in the call conditions or rules of contest
(b) readable, accessible and printable

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.

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 accordingly[18] (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).

A proposal will only be considered eligible if its content corresponds to the topics and funding schemes, including the specific eligibility conditions set out in the relevant parts of

[17] Horizon 2020 Work Programme: General Annexes
[18] In accordance with section III.6 Admissibility & Eligibility check of the Grants Manual - Section on: Proposal submission and evaluation

the work programme and if it fulfils all the eligibility criteria (see also section 3 of this guide).

6.3. EVALUATION OF PROPOSALS

General

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.

Operational capacity

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.

A proposal may be rejected on the grounds that it lacks operational capacity.

Award criteria

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.

Evaluation scores will be awarded for each of the three criteria (see table below). All of the separate elements of each criterion will be considered by the experts in their assessment.

An example of the evaluation forms that will be used by the experts in this call will be made available in the Participant Portal.

Scientific Misconduct and Research Integrity

Please note that the issues of scientific misconduct and research integrity are taken very seriously. In line with the Horizon 2020 Rules for Participation, appropriate action such as termination of the Grant Agreement Preparation phase or, if the Grant Agreement has been signed, implementation of liquidated damages and financial penalties, suspension of payments, recoveries and termination of the Grant Agreement, will be taken against any applicants/beneficiaries found to have misrepresented, fabricated or plagiarised any part of their proposal. The applicants will also be required to make a "declaration on honour" in Part A of the proposal.

It is also expected that procedures for promoting research integrity and managing scientific misconduct will be addressed in the proposal. For example, applicants are encouraged to describe clear procedures for dealing with cases of misconduct (e.g. data fabrication, falsification, plagiarism, misuse of funds, double-funding, etc.) should they arise during action implementation.

Principles of research integrity – as set out, for instance, in the European Code of Conduct for Research Integrity – will apply throughout all MSCA actions.

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 *ex aequo*		
NB: An overall threshold of 70% will be applied to the total weighted score.		

Scoring

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

The scores indicate the following with respect to the criterion under examination:

*0 – Proposal **fails** to address the criterion or cannot be assessed due to missing or incomplete information.*

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

*2 – **Fair**. Proposal broadly addresses the criterion, but there are significant weaknesses.*

*3 – **Good**. Proposal addresses the criterion well, but a number of shortcomings are present.*

*4 – **Very Good**. Proposal addresses the criterion very well, but a small number of shortcomings are present.*

*5 – **Excellent**. Proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.*

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

7. PART A OF THE PROPOSAL

Proposals must be created and submitted electronically through the submission wizard, in which a main contact and contact person(s) should be identified. Once the applicant saves the changes, an automatic invitation is sent to the given contacts' e-mail addresses. The invited persons can access the proposal after logging into the Participant Portal - with the EU Login account linked to the given e-mail address - under the My Proposals menu.

By clicking on the **'Edit Form' button** at Step 5 of the wizard, the applicant can fill in the administrative forms (Part A) for the proposal, which will be used in the evaluation and further processing of the proposal. Part A is an integral part of the proposal, and has a number of mandatory fields (such as the name of the supervisor(s), researcher, etc.) which, if not completed, will not allow the submission of the proposal. Details of the work intended to be carried out will be described in Part B (see next section).

The Electronic Submission Service provides guidance on how to complete the Part A, which includes the following sections:

SECTION 1 – GENERAL INFORMATION AND INSTRUCTIONS

This section requests information about the proposal, including an abstract of the action proposal.

Note that the acronym, abstract and scientific area are pre-filled with the data encoded in the initial submission screen, but can be edited.

Descriptors/keywords

In the electronic submission system (SEP) the applicants should **choose** the **scientific area** and **descriptors** (keywords) **carefully** since this will guide the REA in the selection of the most appropriate experts for the proposal evaluation. The number of descriptors will range from three (3) to five (5) as explained below. Applicants **must**:

1) Select one of the 5 types of fellowship (EF-ST, EF-CAR, EF-RI, EF-SE, GF) for which their proposal is submitted (already done when creating the proposal).
2) Select the area of research (CHE, ECO, ENG, ENV, LIF, MAT, PHY, SOC) in which the proposal best fits. This should be considered as the core discipline of the proposal and determines (for ST and GF) the list in which the proposal will be ranked.
3) Select the first descriptor that best characterises the subject of the proposal (e.g. Physical Chemistry). This descriptor must be selected within the area of research (e.g.: CHE) that has been selected in step 2. Sub-areas of research (e.g.: C3 – Physical and Analytical Chemistry) are only there to structure the list.
4) Select the second descriptor that best characterises the subject of the proposal. This descriptor must be selected within the area of research (e.g.: CHE) that has been selected in step 2.
5) Select the third descriptor which can be chosen from any of the eight (8) areas of research.
6) You may add further two (2) additional descriptors chosen from any of the eight (8) areas of research.

Please note that you should select the descriptors in order of importance, the first being the most important and most relevant for the proposal.

To help you select the most relevant area for your proposal, a document providing a breakdown of each scientific area into a number of descriptors can be found in Annex to this guide.

Resubmission

If you have submitted your proposal (or a very similar one[19]) to the IF Calls for Proposals MSCA-IF-2015 or MSCA-IF-2016, the evaluators will receive a copy of the previous Evaluation Summary Report [20].

Proposals are only considered as resubmitted if Supervisor, Researcher and Host Organisation are the same as in the previously submitted proposal.

No reference to the outcome of previous evaluations of a similar proposal should be included in the text. Experts will be strictly instructed to disregard any such references.

[19] If it differs from the current one in minor ways from the scientific point of view
[20] See section 4.2 of the "Grants Manual - Section on: Proposal submission and evaluation"

SECTION 2 – ADMINISTRATIVE DATA OF PARTICIPATING ORGANISATIONS

This section requests administrative information about the main supervisor and the supervisor's host institution (the beneficiary); and information about the supervisor in the TC partner organisation (for GF) if this is applicable.

The legal data of the proposed host are inserted automatically based on the PIC number you encoded earlier. Note that in the case of GF you will also need a PIC number for the partner organisation from the TC.

If relevant to the action you should encode information on the "Department(s) carrying out the proposed work".

You will also need to complete information on the researcher in this section, including

- Contact details (including e-mail)
- All relevant qualifications
- Place(s) of activity/place(s) of residence (for the past previous 5 years - most recent one first). Any data provided should correspond to the part B (CV section). This information will be used to verify eligibility

SECTION 3 – BUDGET

This section shows information on the duration (person-months) and calculates the total requested EU contribution.

The applicant must enter the duration of the fellowship and the system will automatically calculate the budget based on the number of months (for GF, separate values for each phase), country of the beneficiary (and country of partner organisation for GF) and the family situation of the experienced researcher at the call deadline.

Care should be taken when entering the data for the budget. Experts will not comment on the budget but will evaluate the planned duration of each element of the fellowship under the *Quality and efficiency of the implementation* criterion.

When you complete part A, please make sure that *numbers are always rounded.* Person-months are always full months.

SECTION 4 – ETHICS

This section identifies any ethical aspects of the proposed work. Even if there are no issues, you must simply confirm that none of the ethical issues apply to the proposal. For details on how to complete the section, see Guidance - How to complete your ethics self-assessment.

SECTION 5 – CALL SPECIFIC QUESTIONS

This section requests several declarations related to eligibility and personal data, together with questions on any secondment in Europe, as well as confirmation on data management and participant in the open research data pilot.

Background : Open Science under Horizon 2020

Open Science refers to the Horizon 2020 objective of increasing openness at all stages of the research life cycle and thus ensuring that science serves innovation and growth. Open Science guarantees open access to publicly-funded research results and promotes a range of facilities for knowledge sharing. Moreover, Open Science is an inclusive process aimed at promoting diversity in science across the European Union and opening it to the general public, in order to better address the H2020 societal challenges and ensure that science becomes more responsive both to socio-economic demands and to those of European citizens.

As part of Open Science, Open Access aims at providing on-line access to scientific information that is free of charge to the reader, focusing on access to 'scientific information' or 'research results', which refers to two main categories:

- Peer-reviewed scientific research articles (primarily published in academic journals)
- Research data

Applicable provisions in H2020

To improve access to scientific information and to boost the benefits of public investment in research funded under Horizon 2020, you must ensure open access to all peer-reviewed scientific publications relating to your results

Horizon 2020 also includes a pilot on Open Access to Research Data. The goal of the pilot is to improve and maximise access to and re-use of research data generated by Horizon 2020 funded actions.

As of the Work Programme 2017, the Open Research Data pilot has been extended to cover all thematic areas of Horizon 2020 per default. However, the Commission recognises that some research data cannot be made open and applies the principle of 'as open as possible, as closed as necessary'. It is therefore possible to opt out of research data sharing at any stage - before or after the signature of the grant agreement - but reasons have to be given e.g. for intellectual property rights (IPR) concerns, privacy/data protection concerns, national security concern, if it would run against the main objective of the action or for other legitimate reasons.
Please note that participation in the Pilot implies that a Data Management Plan will have to be submitted as a deliverable during the implementation of the action.
Whether a proposed project participates in the ORD pilot or chooses to opt out does not affect the evaluation of that proposal. In other words, proposals will not be penalised for opting out.
Further information on Open Access, the Data Management Plan and the pilot can be found in the documents section of the Participant Portal.

8. PART B OF THE PROPOSAL

8.1. GENERAL INFORMATION AND INSTRUCTIONS

*The **Part B is the core part** of the proposal; it contains the details of the proposed research and training activities along with the practical arrangements planned to implement them. The document will be used by the independent experts **to undertake their assessment**. Therefore, please address each of the award criteria as outlined in the following sections. Please note that the explanatory notes below serve to explain the award criteria without being exhaustive.*

Applicants shall use the template of part B, available (as a Word version) in the Participant Portal, in order to ensure that:

- The experts assess the proposal within a familiar structure
- All core information of part B is present
- The page limit is respected (*pages beyond this limit will NOT be read by the evaluators*)

Proposals must respect the following minimum standards:

- a minimum font size of 11 points, except for the Gantt chart and tables where the minimum font size is 8 points
- single line spacing
- A4 page size
- margins (top, bottom, left, right) of at least 15 mm (not including any footers or headers)
- a clearly readable font (e.g. Arial or Times New Roman)

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.

Footnotes are to be used exclusively for **literature references.** Their minimum font size is 8. They will count towards the page limit. Any other information included in a footnote will be disregarded.

Please make sure that the Part B of your proposal carries on **each page**, as a **header**, the **proposal acronym** and the **fellowship type** to which you are applying (i.e. Standard EF, CAR, RI, SE, or GF). All pages should be **numbered** in a single series on the footer of the page to prevent errors during handling. It is recommended to use the numbering format "Part B - Page X of Y".

Applicants must submit **two separate pdf documents** in the Participant Portal as Part B of their proposal:

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*).*

8.2. TEMPLATE OF PART B OF THE PROPOSAL

Part B-1 Start Page

START PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

Individual Fellowships (IF)
Call: H2020-MSCA-IF-2017

PART B

"PROPOSAL ACRONYM"

This proposal is to be evaluated as:

[EF-ST] [EF-CAR] [EF-RI] [EF-SE] [GF]
[Delete as appropriate]

Part B - Page X of Y

Part B-1 Table of contents

There are no specific instructions about the table of contents. It can cover both part B1 and B2.

This section must consist of 1 whole page.

Part B-1 List of participating organisations

Please provide a list of all participating organisations (the beneficiaries and, where applicable, the entity with a capital or legal link to the beneficiary and the partner organisation[21]) indicating the legal entity name, the department carrying out the work and the supervisor.

[21] All partner organisations should be listed here, including secondments

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

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

[22] For example hosting secondments, for GF hosting the outgoing phase, etc.
[23] As defined in Commission Recommendation 2003/361/EC

Part B-1 Section 1 - Excellence

START PAGE COUNT – MAX 10 PAGES

1. Excellence[24]

1.1 Quality and credibility of the research/innovation action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects)

You should develop your proposal according to the following lines:

- Introduction, state-of-the-art, specific objectives and overview of the action.
- Research methodology and approach: highlight the type of research / innovation activities proposed.
- Originality and innovative aspects of the research programme: explain the contribution that the action is expected to make to advancements within the action field. Describe any novel concepts, approaches or methods that will be implemented.
- The gender dimension in the research content (if relevant).

  In research activities where human beings are involved as subjects or end-users, 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.

- The interdisciplinary aspects of the action (if relevant).
- Explain how the high-quality, novel research is the most likely to open up the best career possibilities for the *experienced researcher* and new collaboration opportunities for the host organisation(s).

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

Describe the training that will be offered.

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

- Explain how the *experienced researcher* will gain new knowledge during the fellowship at the hosting organisation(s).
- Outline the previously acquired knowledge and skills that the researcher will transfer to the host organisation(s).

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

Typical **training activities** in Individual Fellowships may include:

[24] Literature should be listed in footnotes, font size 8 or 9. All literature references will count towards the page limit.

- 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)
- Hands-on training activities for developing scientific skills (new techniques, instruments, research integrity, 'big data'/'open science') and transferrable skills (entrepreneurship, proposal preparation to request funding, patent applications, management of IPR, project management, task coordination, supervising and monitoring, take up and exploitation of research results)
- Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments)
- Taking part in the research and financial management of the action
- Organisation of scientific/training/dissemination events
- Communication, outreach activities and horizontal skills
- Training dedicated to gender issues

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

- Qualifications and experience of the supervisor(s)

  Provide information regarding the supervisor(s): the 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.

- Hosting arrangements[25]

  The application must show that the experienced researcher will be well integrated within the team/institution in order that all parties gain maximal 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.

  For GF 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.

1.4 Capacity of the researcher to reach or re-enforce a position of professional maturity/independence

Applicants should **demonstrate** how their professional experience and the proposed research will contribute to their development as independent/mature researchers, **during** the fellowship.

[25] 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.

Please keep in mind that the fellowships will be awarded to the most talented researchers as shown by the proposed research and their track record (Curriculum Vitae, section 4), in relation to their level of experience.

A complete **Career Development Plan should not be included in the proposal**, but it is part of implementing the action in line with the European Charter for Researchers. It should aim at reaching a realistic and well-defined objective in terms of career advancement (by attaining a leading independent position for example) 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.

Part B-1 Section 2 – Impact

2. Impact

2.1 Enhancing the potential and future career prospects of the researcher

Explain the expected impact of the planned research and training on the future career prospects of the experienced researcher **after** the fellowship.

Describe the added value of the fellowship on the future career opportunities of the researcher.

Which new competences and skills will be acquired? How should these make the researcher more successful?

2.2 Quality of the proposed measures to exploit and disseminate the action results

Background – Dissemination and exploitation of results

Dissemination and Exploitation strategy is about the results of the action and it is targeted at peers (scientific or the action's own community, industry and other commercial actors, professional organisations, policymakers) and to the wider research and innovation community - to achieve and expand the potential impact of the action. The proposal should describe the foreseen dissemination and exploitation activities and their expected impact.

All researchers should ensure, in compliance with their contractual arrangements, that the results of their research are disseminated and exploited, e.g. communicated, transferred into other research settings or, if appropriate, commercialised. Senior researchers, in particular, are expected to take a lead in ensuring that research is fruitful and that results are either exploited commercially or made accessible to the public (or both) whenever the opportunity arises.

Please refer also to the "Dissemination & exploitation" section of the H2020 Online Manual.

Describe how the new knowledge generated by the action will be disseminated and exploited, e.g. communicated, transferred into other research settings or, if appropriate,

commercialised. Describe, when relevant, how intellectual property rights will be dealt with.

A concrete planning for section 2.2 must be included in the Gantt Chart (see point 3.1).

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

Background - Communication

Communication of the action aims to demonstrate the ways in which the research, training and mobility contribute to a European "Innovation Union" and account for public spending. It should provide tangible proof that the funded action adds value by:

• showing how European and international collaboration has achieved more than would have otherwise been possible, notably in achieving scientific excellence, contributing to competitiveness and, where relevant, solving societal challenges;

• showing how the outcomes are relevant to our everyday lives, by creating jobs, training skilled researchers, introducing novel technologies, bringing ideas from research to market or making our lives more comfortable in other ways;

• promoting results, which may possibly influence policy-making, and ensure follow-up by industry, civil society and by the scientific community.

In the MSCA, public engagement is an important part of communication. The primary goal of public engagement activities is to create awareness among the general public of the research work performed under these projects and its implications for citizens and society. The type of outreach activities could range from 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.

Researchers should ensure that their research activities – both the action and, when available, its results – are made known to society at large in such a way that they can be understood by non-specialists, thereby improving the public's understanding of science. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns.

For more details, see the guide on *Communicating EU research and innovation guidance for project participants* as well as the "communication" section of the H2020 Online Manual.

The frequency and nature of communication activities should be outlined in the proposal. Concrete plans for the above must be included as a deliverable.

A concrete planning for section 2.3 must be included in the Gantt Chart (see point 3.1).

Part B-1 Section 3 - Implementation

3. Quality and Efficiency of the Implementation

3.1 Coherence and effectiveness of the work plan

The proposal should be designed in such a way to achieve the desired impact. A Gantt Chart should be included in the text listing the following:

- Work Packages titles (for EF there should be at least 1 WP);
- List of major deliverables, if applicable;[26]
- List of major milestones, if applicable;[27]
- Secondments, if applicable.

The schedule should be in terms of number of months elapsed from the start of the action.

[26] 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. Should the applicants wish to participate in the pilot on Open Research Data, the Data Management Plan should be indicated here.
Deliverable numbers ordered according to delivery dates. Please 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.

[27] 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.

Example Gantt Chart

Reflecting work package, secondments, short stays, training, dissemination and exploitation, communication activities

																								Global Fellowship only											
Month	**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**
Work package																																				
Deliverable																																				
Milestone																																				
Secondment																																				
Short stay (if already planned)																																				
Training																																				
Dissemination and exploitation																																				
Communication																																				
Other (to be specified)																																				

Delete rows and columns that do not apply, or add additional rows and columns if needed.

3.2. Appropriateness of the allocation of tasks and resources

Describe how the work planning and the resources mobilised will ensure that the research and training objectives will be reached.

Explain why the amount of person-months is appropriate in relation to the activities proposed.

3.3 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
- Research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur
- Involvement of entity with a capital or legal link to the beneficiary (in particular, name of the entity, type of link with the beneficiary and tasks to be carried out), if applicable

3.4 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 partner organisations in Third Countries for the outgoing phase should also appear.

- Give a description of the main tasks and commitments of the beneficiary and all partner organisations (if applicable).
- Describe the infrastructure, logistics, facilities offered in as far they are necessary for the good implementation of the action.

STOP PAGE COUNT – MAX 10 PAGES

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 3 evaluation criteria by the expert evaluators. Please make sure that the information between part A and B is fully consistent.

Applicants without a doctorate should clearly justify 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 this template.

This section should be limited to maximum 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.

The *experienced researcher* must provide a list of achievements reflecting their track record, if applicable:

1. **Publications** in peer-reviewed scientific journals, peer-reviewed conference proceedings and/or monographs of their respective research fields, indicating also the number of citations (excluding self-citations) they have attracted.
2. Granted **patent(s)**.
3. **Research monographs, chapters** in collective volumes and any translations thereof.
4. **Invited presentations** to peer-reviewed, internationally established conferences and/or international advanced schools.
5. **Research expeditions** led by that the *experienced researcher*.
6. **Organisation of International conferences** in the field of the researcher (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.

Applicants without a doctorate awarded before the call deadline must complete the table below[28]:

Academic Qualifications counting towards the Total Full time postgraduate research experience			
University Degree giving access to PhD[29]:	Institution name and country	Date of award (a)	
		DD/MM/YYYY	
Other university degree(s)/master(s), if any, obtained after the award of the University Degree giving access to PhD:	Institution name and country	From	To
		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)[30] = 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[31]		Duration of research activities expressed in months
			(c)
Other research activities counting towards the Total Full time postgraduate research experience			
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)
Total Full time postgraduate research experience: Number of months			**= (b)+(c)+(d)**

<u>Please make sure this data is consistent with the data inserted in part A of the proposal.</u>

[28] More entries can be added if needed.
[29] See definition of Full-Time Equivalent Research Experience in this Guide for Applicants
[30] Please count only time spent in months on research activities.
[31] Please count only time spent until the IF 2017 call deadline (14/09/2017) or the end of the PhD, whichever comes first

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

Beneficiaries and partner organisations must complete the table below.
Complete one table (min font size: 8) of maximum **one page per beneficiary and one page per partner organisation**. The expert evaluators will be instructed to disregard content above this limit.

Beneficiary X	
General Description	
Role and Profile of key persons (supervisor)	*(names, title, qualifications of the main supervisor)*
Key Research Facilities, Infrastructure and Equipment	*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* *If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and its role in the action.*
Independent research premises?	*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?* *If applicable, indicate the name of the entity with a capital or legal link to the beneficiary and describe the nature of the link..*
Previous Involvement in Research and Training Programmes	*Detail any (maximum 5) relevant EU, national or international research and training actions/projects in which the beneficiary has previously participated*
Current involvement in Research and Training Programmes	*Detail the EU and/or national research and training actions in which the beneficiary is currently participating*
Relevant Publications and/or research/innovation products	*(Max 5) Only list items (co-)produced by the supervisor*
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	*(Max 3)*

Part B-2 Section 6 - Ethical Issues

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 within 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.

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 Ethics Review Procedure in Horizon 2020

All proposals above threshold and considered for funding 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 have to complete also a more in depth **Ethics Self-Assessment in Part B**.

The ethics self-assessment will become part of the Grant Agreement and may thus lead to binding obligations that may later on be checked during ethics checks, reviews and audits.

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 meets the EU and national legal and ethics requirements of the country/countries where the task raising ethical issues is to be carried out.**

For more information on how to deal with Third Countries (in the context of ethics appraisal, Third Country refers to non-EU country; Associated Countries are "ethics" TC) please see Article 34 of the Annotated Model Grant Agreement, as well as the following link. Please ensure and 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.

Please list the documents provided with their expiry date.

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 to confirm that you have obtained the following documents (if applicable):

(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

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 missing approval/any other ethics documents. Please state explicitly that you will not proceed with any research with ethical implications before obtaining the necessary authorizations/ opinions.

The documents must be kept on file and be submitted upon request by the beneficiary to the Agency (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.*

2) 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.);
- 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, (as an example: environmental risks of nanomaterials), and measures that will be taken to mitigate the risks.

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

For the Global Fellowship proposals, a letter of Commitment **of the partner organisations** (hosting the outgoing phase in a third country) must be included in part B-2 to ensure their real and active participation. these should not be attached as a separate PDF file or as an embedded file since this makes them invisible.

GF Proposals which fail to include a letter of commitment of the partner organisation will be declared **inadmissible**.

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 these letters is provided, only general rules.

ANNEX 1 - FURTHER INFORMATION AND HELP

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.

Call Information

- Participant Portal call page
- MSCA Work Programme 2016 - 17

General Sources of Help

- Marie Skłodowska-Curie actions website
- Information package for MSCA fellows
- EURAXESS
- European Commission Horizon 2020 Research Enquiry service
- National Contact Points
- Frequently Asked Questions
- MSCA NCP Net4Mobility project website

Specialised and Technical Assistance

- Submission Service Help Desk (also by email)
- IPR Help desk

Other Useful Reference Documents

- 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

ANNEX 2 – LIST OF DESCRIPTORS

Chemistry (CHE)	**Area of research**

C1 – Inorganic Chemistry

Bioinorganic chemistry
Catalytic materials
Coordination chemistry
Chemistry of non-metals
Inorganic chemistry
Organometallic chemistry
Radiation and nuclear chemistry
Solid state materials

C2 – Organic, Polymer and Molecular Chemistry

Carbohydrates
Chirality
Click chemistry
Combinatorial chemistry
Heterocyclic chemistry
Macromolecular chemistry
Molecular architecture and structure
Molecular chemistry
Natural product synthesis
Nucleic acid chemistry
Organic chemistry
Organic reaction mechanisms
Peptide chemistry
Polymer chemistry
Stereochemistry
Supramolecular chemistry
Synthetic organic chemistry

C3 – Physical and Analytical Chemistry

Analytical chemistry
Chemical instrumentation and instrumental techniques
Chemical reactions: mechanisms, dynamics, kinetics and catalytic reactions
Chemistry of condensed matter
Crystallography and X-ray diffraction
Chromatography
Colloid chemistry
Corrosion
Crystallisation

Electrochemistry, electro dialysis, microfluidics, sensors
Forensic chemistry
Homogeneous catalysis
Heterogeneous catalysis
Ionic liquids
Magnetic resonance
Mass spectrometry
Method development in chemistry
Microscopy
Molecular dynamics
Molecular electronics
Photocatalysis
Photochemistry
Physical chemistry
Physical chemistry of biological systems
Quantum chemistry
Separation techniques/extraction
Spectroscopic and spectrometric techniques
Surface chemistry
Theoretical and computational chemistry
Trace analysis

C4 – Applied and Industrial Chemistry

Batteries
Biological chemistry, biochemistry
Biomaterials, biomaterial synthesis
Ceramics
Coating
Enzymology
Food chemistry
Fuel cells
Graphene, carbon nanotubes
Green chemistry
Hydrogen production/storage
Intelligent materials, self-assembled materials
Materials for sensors
Medicinal chemistry
Nanochemistry
Nano-materials: oxides, alloys, composite, organic-inorganic hybrid, nanoparticles
Pharmaceutical processes and production, Regulatory aspects, quality assurance, good manufacturing practice
Plastics
Porous materials, metal organic framework (MOFs)
Solar cells
Structural properties of materials
Surface modification
Targeted drug delivery/discovery

Thin films
Toxicology
Water splitting
Water treatment/purification

Economic Sciences (ECO)	**Area of research**

E1 - Economics

Applied research econometrics
Behavioural and experimental economics
Economic geography
Economic growth
Economic history
Economics of education
Environment economics
Financial econometrics
Game theory
Global macroeconomic challenges
Health economics
Industrial economics
International trade
Labour economics
Macroeconomics theory
Monetary economics, international finance
Political economy
Public economics
Social economics, welfare economics
Statistics and big data
Urban and regional economics

E2 – Economic Development

Circular economy
Cluster development
Environment issues in development economics
Key enabling technologies for development
Natural resources management
Public administration
Research & Open innovation, competitiveness

E3 – Management

Corporate governance and management
Human resources management
Industrial organisation
Research and innovation management

Start-up's, new business models in entrepreneurship, social entrepreneurship
Strategy, marketing
Value chain and optimisation

E4 – Finance

Accounting, international accounting standards, reporting, tax issues related to accounting
Banks, insurance companies, financial intermediaries & fund, credit rating agencies
Corporate finance, fundamentals analysis, capital budgeting, venture capital, risk assessment
Financial markets, stock markets, fixed income markets, other markets
Investments, asset pricing, bonds, derivatives, commodities

Information Science and Engineering (ENG) Area of research

G1 - Computer science and informatics

Algorithms, distributed, parallel and network algorithms, algorithmic game theory
Artificial intelligence, intelligent systems, multi agent systems
Bioinformatics, e-Health, medical informatics
Cognitive modelling, cognitive engineering, cognitive sciences
Complexity and cryptography, electronic security, privacy, biometrics
Theorem proving, symbolic, algebraic computations
Pervasive computing, ubiquitous computing, ambient intelligence, internet of things
Computer games, computer geometry, multi-media, augmented and virtual reality
Computer graphics, computer vision, multi media, computer games
Parallel/distributed systems, GPGPU, grid, cloud processing systems
E-commerce, e-business, computational finance
E-learning, user modelling, collaborative systems
Intelligent robotics, cybernetics
Internet and semantic web, ontologies, database systems and libraries
Machine learning, data mining, statistical data processing and applications
Modelling engineering, human computer interaction, natural language processing
Numerical analysis, simulation, optimisation, modelling tools,
Scientific computing and data processing
Sensor networks, embedded systems, hardware platforms
Software engineering, operating systems, computer languages
Neural networks, connectionist systems, fuzzy logic
Evolutionary computing, biologically-inspired computing
Theoretical computer science, formal methods

Quantum computing, DNA computing, photonic computing

G2 - Systems and Communication Engineering: Electrical, electronic, communication, optical and systems engineering

Control Engineering
Diagnostic and implantable devices, environmental monitoring
Electrical and electronic engineering: semiconductors, components, systems
Electronics, photonics
Human-computer-interfaces
Nano engineering
Networks (communication networks, sensor networks, networks of robots,etc.)
Optical engineering, photonics, lasers
Signal processing
Simulation engineering and modelling
Systems engineering, sensorics, actorics, automation
Wireless communications, communication, high frequency, mobile technology

G3 - Products and Processes Engineering: Product design, process design and control, construction methods, civil engineering, energy processes, material engineering

Aerospace engineering
Architecture, smart buildings, smart cities, urban engineering
Chemical engineering, technical chemistry
Civil engineering
Computational engineering and computer aided design
Energy collection, conversion and storage, renewable energy
Energy systems, smart energy, smart grids, wireless energy transfer
Environmental engineering and geotechnics
Fluid mechanics, hydraulic-, turbo-, and piston engines
Industrial bioengineering
Industrial design (product design, ergonomics, man-machine interfaces, etc.)
Lightweight construction, textile technology
Maritime engineering
Materials engineering
Mechanical and manufacturing engineering (shaping, mounting, joining, separation)
Production technology, process engineering
Sustainable design (for recycling, for environment, eco-design)
Transport engineering, intelligent transport systems
Waste treatment

Environmental and Geosciences (ENV) Area of research

V1 - Environment and society

Clean technologies, circular economy, life cycle assessment

Environmental determinants of health
Environmental regulations, climate negotiations and citizen science
Environmental risk assessment, monitoring
Mobility and transportation
Social and industrial ecology, sustainable development
Spatial and regional planning (including landscape and land management), GIS
Urbanization and urban planning, cities
Waste, by-products and residue management (including from agriculture)

V2 - Earth system science

Atmospheric chemistry, atmospheric composition, air pollution, indoor air quality
Biogeochemistry, biogeochemical cycles
Clean exploration and exploitation of natural resources
Climatology and climate change
Cryosphere, dynamics of snow and ice cover, sea ice, permafrost and ice sheets
Earth observations from space/remote sensing
Environmental chemistry, environmental forensics
Geochemistry, crystal chemistry, isotope geochemistry
Geology, tectonics, volcanology, physics of earth's interior, seismology
Hydrology, water management
Meteorology, atmospheric physics and dynamics
Mineralogy, petrology, igneous petrology, metamorphic petrology
Natural hazards
Noise pollution
Oceanography, marine science, coastal engineering
Paleoclimatology, paleoecology
Physical geography
Pollution (water, soil, sediment), rehabilitation and reconstruction of polluted areas, clean technologies
Sedimentology, soil science, palaeontology
Terrestrial ecology, land cover change

V3 - Evolutionary, population and environmental biology

Animal behaviour
Biogeography, macro-ecology
Biodiversity, conservation biology
Comparative biology
Ecology
Ecotoxicology
Environmental, marine and freshwater biology
Population biology, population dynamics, population genetics
Species interactions (e.g. food-webs, symbiosis, parasitism, mutualism, bio-invasion)
Systems evolution, biological adaptation, phylogenetics, systematics

V4 - Food Science, Agriculture, Forestry and Non-Medical Biotechnology

Agriculture production systems (animals)
Agriculture production systems (crops), including fertilisation and nutrient management
Applied plant biology
Applied biotechnology (non-medical), bioreactors, applied microbiology
Aquaculture, fisheries
Biohazards, biological containment, biosafety, biosecurity
Biomass and biofuels production
Biomimetics
Crop protection, pest and disease control
Environmental biotechnology, bioremediation, biodegradation
Food sciences, safety, traceability, authenticity, agroindustry
Forestry and forest management, agroforestry
Soil biology, soil functionality, soil management

Life Sciences (LIF) **Area of research**

L1 - Molecular and Structural Biology

Biophysics (e.g. transport mechanisms, bioenergetics, fluorescence)
DNA synthesis and degradation
DNA repair and recombination
Molecular metabolism
Molecular interactions
Protein synthesis, folding, modification and turnover
Lipid synthesis, modification and turnover
Carbohydrate synthesis, modification and turnover
RNA synthesis, processing, modification and degradation
Structural biology (e.g. crystallography, EM, NMR, PET)

L2 - Genetics, Genomics, Bioinformatics and Systems Biology

Applied genetic engineering, transgenic organisms, recombinant proteins, biosensors
Bioinformatics
Biological systems analysis, modelling and simulation
Biostatistics
Computational biology
Epigenetics and gene regulation
Genetic epidemiology
Genomics and functional genomics
Genetic and genomic variation and related disorders
Comparative, evolutionary and population genomics

Chromosome structure organisation and dynamics
Metabolomics (including glycomics)
Molecular genetics, reverse genetics and RNAi
Proteomics
Quantitative genetics
Systems biology
Transcriptomics
Plant genetics
Genome editing
Genetic pharmacology

L3 - Cellular and Developmental Biology

Developmental biology and technology
Pattern formation and embryology in animal organisms
Molecular transport mechanisms
Mechanisms of growth control and cell proliferation
Cell differentiation, physiology and dynamics
Morphology and functional imaging of cells
Organelle biology
Plant development pattern formation and embryology in plants
Molecular mechanisms of signal transduction
Stem cells and cellular programming
Mechanisms and dynamics of cell migration

L4 - Physiology, Pathophysiology and Endocrinology

Ageing
Cancer and its biological basis
Cardiovascular diseases
Comparative physiology
Endocrinology
Metabolism, biological basis of metabolism related disorders
Organ physiology and pathophysiology
Environmental physiology
Rare/orphan Diseases
Reproductive biomedicine (reproductive physiology and endocrinology, infertility and pregnancy research)

L5 - Neurosciences and neural disorders

Behavioural neuroscience (e.g. sleep, rhythms, speech, handedness)
Cognitive neuroscience (e.g. learning, memory, emotions, consciousness)
Neural development and neuroplasticity
Mechanisms of pain
Molecular and cellular neuroscience
Neuroanatomy and excitability
Physiology of nerves and motor systems
Medicines, psychoactive drugs and pharmacology, poison.

Neuroimaging and computational neuroscience
Neurological disorders (e.g. Alzheimer's disease, Huntington's disease, Parkinson's disease)
Psychiatric disorders and clinical psychology (e.g. schizophrenia, autism, Tourette's syndrome, obsessive compulsive disorder, depression, bipolar disorder, attention deficit hyperactivity disorder, addiction)
Sensory perception (nose and smell, tongue and taste, eyes and vision, ears and hearing, skin, pain, touch and movements)

L6 - Immunity and infection

Bacteriology
Biological basis of cancer immunity
Biological basis of auto-immunity/tolerance
Biological basis of immunity related inflammatory disorders
Biological basis of other immunity related disorders
Cellular and adaptive immunity
Immunogenetics
Immunological memory and tolerance
Immunosignalling
Microbiology
Parasitology
Phagocytosis and innate immunity
Prevention and treatment of infection by pathogens (e.g. vaccination, antibiotics, fungicide)
Veterinary medicine and infectious diseases in animals
Virology

L7 - Diagnostic tools, therapies and public health

Diagnostic tools (e.g. genetic, molecular diagnostic)
Drug discovery and design (formulation and delivery)
Drug therapy and clinical studies
In vivo bio and medical imaging
In vitro cell and tissue imaging
Environment and health risks, occupational medicine
Gene therapy, cell therapy, regenerative medicine
Tissue regeneration and engineering
Immunotherapy (vaccine discovery, genetic vaccines)
Health services, health care research
Medical engineering and technology
Personalised medicine (diagnostic/prognostic biomarker, patient-orientated management solutions)
Pharmacology, pharmacogenomics
Public health and epidemiology
Radiation therapy
Surgery

Mathematics (MAT)	**Area of research**

M1 - Mathematics

Algebraic geometry
Algebraic number theory
Algebraic topology
Algorithms and complexity
Analytic number theory
Category theory and algebraic structures
Combinatorics
Complex analysis
Complex geometry
Differential Geometry
Functional analysis
Game Theory
General topology
Graph Theory
Group Theory
Harmonic analysis
Homological algebra
Low dimensional topology
Mathematical logic and set theory
Non commutative Geometry
Ordinary Differential Equations and Dynamical Systems
Partial Differential Equations
Probability
Ring theory
Set theory

M2 – Applied Mathematics

Control Theory
Data Analysis
Mathematical aspects of Biology
Mathematical aspects of Computer Science
Mathematical aspects of Economy and Finance
Mathematical aspects of Physics
Mathematics in Engineering and other Applied Sciences
Numerical analysis and scientific computing
Operational Research
Optimization
Scientific Computing
Statistics

Physics (PHY)	**Area of research**

P1 – Particle and Nuclear Physics

Fundamental interactions and fields
Neutrino oscillations
Nuclear physics, heavy ions
Nuclear physics, nuclear structure
Particle accelerators and detectors
Particle physics, experiment
Particle physics, theory/phenomenology
Supersymmetric particles
Quantum chromodynamics
Quantum field theory

P2 – Atomic and molecular physics, optics

Atomic physics
Chemical Physics
Cold/Ultra-cold atoms and molecules
Laser physics
Metrology and measurement
Molecular physics
Nano-optics
Non linear optics
Interferometry
Optical physics
Photonics
Statistical physics (gases)
Quantum optics
Quantum electrodynamics

P3 - Condensed matter physics

Condensed matter, thermal properties
Condensed matter, transport properties
Condensed matter, mechanical and acoustical properties, lattice dynamics
Electronic properties of materials, surfaces, interfaces…
Films and Interfaces
Fluid dynamics
Gas and plasma physics
High pressure physics
Low-temperature physics
Magnetism and strongly correlated systems
Mesoscopic physics
Nanophysics: nanoelectronics, nanophotonics, nanomagnetism, nanoelectromechanics, etc.
Phase transitions, phase equilibria
Polymer physics
Semiconductors and insulators
Soft condensed matter

Spintronics
Statistical mechanics (condensed matter)
Structure of solids and liquids
Superconductivity
Superfluids
Surface Physics

P4 – Astrophysics, Cosmology, Space science

Active Galactic Nucleus (AGN) , QSO
Astrobiology, astrochemistry
Astrometry
Astronomical instrumentation: telescopes, detectors, techniques
Astrophysical jets, accretion phenomena
Big bang nucleosynthesis
Clusters of galaxies and large scale structures
Cosmic Microwave Background (CMB)
Cosmology
Dark matter, dark energy
Formation and evolution of galaxies
Formation, structure and evolution of stars
Extrasolar planets and exoplanets
Gravitational lensing
Gravitational waves
High energy astrophysics
Interstellar medium
Nuclear astrophysics
Radio astronomy
Relativistic astrophysics
Solar physics
Solar system and planetary science
Space weather

P5 – Applied physics

Acoustics
Agrophysics
Biophysics and biophysical techniques
Communication Physics
Complex systems, Networks
Computational Physics
Geophysics
Laser applications
Medical Physics
Nanotechnology: nanomaterials, tools and techniques, applications of nanotechnology
Optical engineering
Optoelectronics
Photodetectors

Photonics applications
Photovoltaics and solar cells
Plasmonics
Quantum electronics
Quantum Technology and Quantum Devices
Solid-state devices

Social Sciences and Humanities (SOC) **Area of research**

S1 - Sociology, social anthropology

Ageing, health social policies
Attitudes and values
Demography, population issues and policies
Fertility, family dynamics, policies
Gender studies
Globalization, glocalization, antiglobalism
Inequalities, discrimination, prejudice, aggression and violence, antisocial behaviour
Kinship, cultural dimensions of classification and cognition, identity
Migration, refugees, asylum, interethnic relations, conflicts and integration of migrants
Myth, ritual, symbolic representations, religious studies
Qualitative methods, ethnography, case studies
Rural population, agriculture, innovation, depopulation
Social economy, social entrepreneurship
Social influence, power and group behaviour, classroom management
Social integration, exclusion, inequalities, participation and prosocial behaviour
Social structure, social mobility
Social theory
Social welfare and neoliberalism
Sociology of education
Sociology of knowledge
Transformation of societies, democratization, social movements
Urban sociology, urban theory, urban studies, global cities, territorialisation
Work, employment, precariousness
Youth studies

S2 - Political science

Comparative politics
Development studies
Electoral politics, Political parties, Citizenship and public engagement
EU and European politics
Foreign policy

Game theory, Logic of collective choice
Human, economic and social geography
International relations, Global governance, International politics and history; Geopolitics
Migration policy
Political economy
Political systems and institutions, governance
Political theory, Political thought, Political philosophy; Ideologies
Politics of gender, Race, Discrimination and inequalities; Identity politics
Public administration, Public policies
Regional and territorial politics
Relations with public interest groups
Theories of conflict, violence and security; Negotiation and mediation

S3 - Law

Business, corporate and securities law
Comparative law
Criminal law
Education law
Employment and labour law, social law
European law
Family and juvenile law
Health law
Intellectual property and innovation law; Data protection law, IT law
International law, human and civil rights; Violence, conflict and peacebuilding
Legal systems, constitutions, foundations of law
Private law, consumer protection law
Public law, immigration law, environmental law
Sports and entertainment law

S4 - Communication

Communication networks, media, including social media, information society
Crisis communication theory and procedures
Digital social research, audiovisual social services
Information & communication technology and the world of work
Information society and education
Institutional communication
Lobbying
Political communication and strategy
Social communication, verbal and non verbal communication
Social studies of science and technology

S5 - Cognition, psychology, linguistics

Biological psychology: mind-body connection, health, stress and disease
Cognitive psychology: learning, cognition
Development across the life-span and developmental psychopathology

Ergonomics, human factors, user modelling, and neuroergonomics
Evolution of mind and cognitive functions, animal communication
Formal, cognitive, functional and computational linguistics
Neuropsychology and neurolinguistics
Psycholinguistics: acquisition, comprehension , production
Socio-cultural psychology and social cognition
Typological, historical and comparative linguistics
Use of language: pragmatics, sociolinguistics, discourse analysis, second language teaching and learning, lexicography, terminology

S6 - Philosophy

Aesthetics and philosophy of culture and anthropology
Analytic philosophy
Epistemology, logic, philosophy of science
Ethics and morality, bioethics
History of philosophy
Metaphysics
Phenomenology
Philosophy of religion
Social and political philosophy

S7 - Education

Education systems, institutions and policies, sociology of education
Educational assessment, feedback
Learning technologies, e-learning, tutoring systems, learning analytics
Lifelong learning, workplace learning and training, heutagogy
Philosophy of education, human development
Teaching and learning methodologies, pedagogy, andragogy, psychology of education

S8 - Literature, arts, music, cultural and comparative studies

African literature
Classics, ancient Greek and Latin literature and art
Comparative literature
Computational modelling and digitisation in the cultural Sphere
Contemporary literature
Cultural memory, intangible cultural heritage
Cultural studies, cultural diversity
History of art and architecture, arts-based research
History of art criticism
History of books, codicology
History of collections
History of fashion design
History of literature
Latin American literature
Library and archival science; Librarianship

Literary theory and comparative literature, literary styles
Medieval literature
Modern literature
Museums and exhibitions, conservation and restoration
Music and musicology, history of music
Oriental and East Asian literature
Textual philology, palaeography and epigraphy
Visual arts, performing arts, film, design

S9 - Archaeology, history and memory

American archaeology, art and culture
Ancient history
Asian archaeology, art and culture
Classical archaeology and art, history of archaeology
Collective memories, identities, lieux de mémoire, oral history
Colonial and post-colonial history, global and transnational history, entangled histories
Cultural heritage, cultural memory
Cultural history; History of collective identities and memories
Diplomatics
Early and modern archaeology
Egyptology and ancient near eastern archaeology, art and culture
Gender history
General archaeology, archaeometry, landscape archaeology
Historiography, theory and methods in history, including the analysis of digital data
History of ideas, intellectual history, history of science, techniques and technologies
Industrial archaeology
Medieval history
Military history
Modern and contemporary archaeology
Modern and contemporary history
Numismatics, epigraphy
Prehistory, palaeoanthropology, palaeodemography, protohistory
Social, economic, cultural and political history