



One (experienced) researcher applies jointly with one host institution located in a Member State or Associated Country for a research project that can last between 12 and 24 months.

Researcher (future Fellow)

- Experienced researcher: PhD or at least 4Y of full-time equivalent research experience by the call deadline**
- Must undertake transnational mobility**
- Nationality: any**
- Recruited by the Beneficiary under the conditions established in the Grant Agreement (contract of employment)**

Project: written by the experienced researcher, a concrete plan of training-through-research for 12 – 24 months at the host organisation's premises under the direct supervision of the Supervisor .

Realistic and well-defined objective in terms of career advancement (e.g. by attaining a leading independent position) or resuming a research career after a break.

Typical training activities may include:

- Primarily **training-through-research**: individual personalised action;
- Hands-on training activities for developing **scientific** (new techniques, instruments etc.) and **transferable skills** (entrepreneurship, proposal preparation to request funding, patent applications, management of IPR, action management, task coordination, supervising and monitoring, take up and exploitation of research results etc.);
- 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.



Transfer of knowledge which contributes significantly to the impact of the fellowship.

When: during the implementation of the project.
Who: the Experienced Researcher
Where: to Partner Organisation - another institution including IO (exceptional cases) located in Europe (MS/AC) or to an IEIO

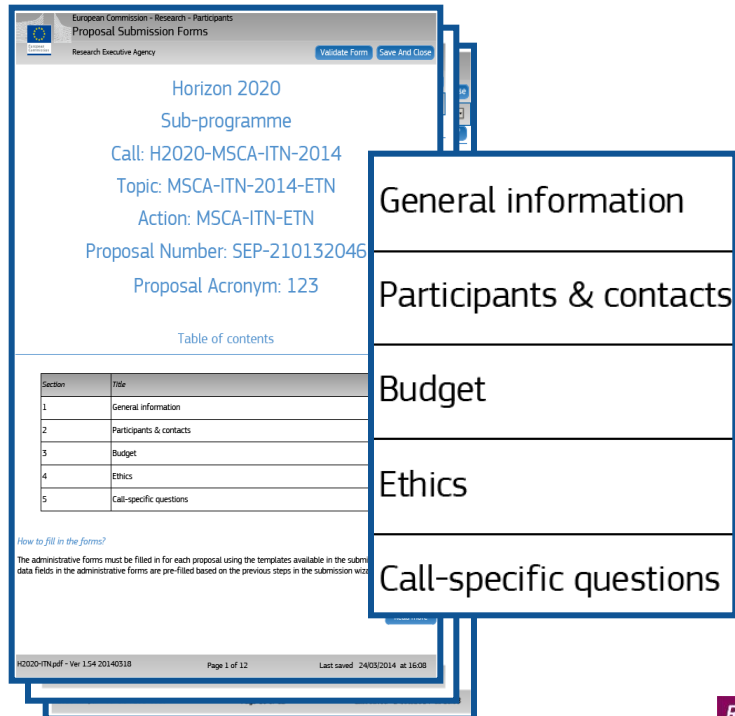
How long:

Duration of the fellowship	Maximum duration of secondment
\leq 18 months	3 months
$>$ 18 months	6 months

- clearly justified and described in Part B
- single period or divided into shorter mobility periods
- can be at more than one partner organisation
- can be to an Institution in the same country as the Beneficiary
- can be in the same sector (academic-academic)

Structure of proposals

Part A - structured data -



European Commission – Research – Participants
Proposal Submission Forms
Research Executive Agency

Horizon 2020
Sub-programme
Call: H2020-MSCA-ITN-2014
Topic: MSCA-ITN-2014-ETN
Action: MSCA-ITN-ETN
Proposal Number: SEP-210132046
Proposal Acronym: 123

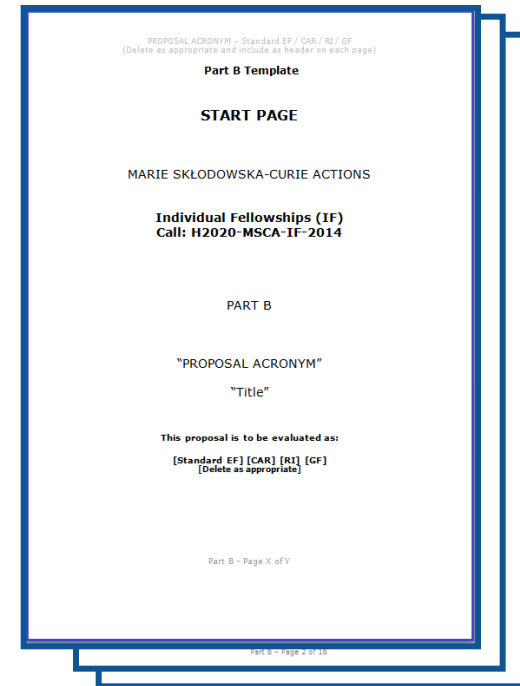
Table of contents

Section	Title
1	General information
2	Participants & contacts
3	Budget
4	Ethics
5	Call-specific questions

How to fill in the forms?
The administrative forms must be filled in for each proposal using the templates available in the submission system. The data fields in the administrative forms are pre-filled based on the previous steps in the submission wizard.

Page 1 of 12

Part B - description of action -



PROPOSAL ACRONYM – Standard EF / CAR / RI / GF
(Delete as appropriate and include as header on each page)

Part B Template

START PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

Individual Fellowships (IF)
Call: H2020-MSCA-IF-2014

PART B

"PROPOSAL ACRONYM"
"Title"

This proposal is to be evaluated as:
[Standard EF] [CAR] [RI] [GF]
(Delete as appropriate)

Part B – Page X of Y



TABLE OF CONTENTS

In drafting PART B of the proposal, applicants must follow the structure outlined below.

LIST OF PARTICIPANTS

START PAGE COUNT.....

- 1. SUMMARY
- 2. EXCELLENCE
- 3. IMPACT **MAX 10 pages**
- 4. IMPLEMENTATION

STOP PAGE COUNT.....

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

IF – Award criteria



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



List of Participants

Please provide a list of all participants (both beneficiary and, where applicable, partner organisations) indicating the legal entity, the department carrying out the work and the supervisor of the action.

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.

Participants	Legal Entity Short Name	Academic (tick)	Non-academic (tick)	Country	Dept./ Division / Laboratory	Supervisor	Role of Partner Organisation
<u>Beneficiary</u>							
- NAME							
<u>Partner Organisation</u>							
- NAME							

1. Summary



START PAGE COUNT

1. Summary

Please provide a short summary of the proposal, which could be the same as the proposal abstract, built around a research/innovation project.

2. Excellence



2.1 **Quality, innovative aspects and credibility of the research** (including inter/multidisciplinary aspects)

You should develop your proposal according to the following lines:

- Introduction, state-of-the-art, objectives and overview of the action
- Research methodology and approach: highlight the type of research and innovation activities proposed
- Originality and innovative aspects of the research programme: explain the contribution that the project is expected to make to advancements within the project field. Describe any novel concepts, approaches or methods that will be employed.

The text should emphasise 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).

2. Excellence



2.2 Clarity and quality of transfer of knowledge/training for the development of the researcher in light of the research objectives

A two way transfer of knowledge should be described:

- The text must show how the Experienced Researcher will gain new knowledge from the hosting organisation(s) during the fellowship through training.
- These organisations **may** also benefit from the previous experience of the researcher. Outline the capacity for transferring the knowledge previously acquired by the researcher to the host organisation(s).

For Global Fellowships explain how the new acquired skills and knowledge in the TC will be transferred back to the host institution in Europe.



2.3 Quality of the supervision and the hosting arrangements

Required sub-heading:

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

Information regarding the supervisor(s) must include the level of experience on the research topic proposed and document its track record of work, including the main international collaborations. Information provided should include participation in projects, publications, patents and any other relevant results.

To avoid duplication, the role and profile of the supervisor(s) should only be listed in the "Capacity of the Participating Organisations" tables (see section 6 below).

The text must show that the Experienced Researcher should be well integrated within the hosting organisation(s) in order that all parties gain the maximum knowledge and skills from the fellowship.

For GF both phases should be described, for the outgoing what practical arrangements are made in place to host a researcher coming from another country and for the return period what measures are planned for the successful re-integration of the researcher.

6. Table



All organisations (whether beneficiary or partner organisation) must complete the appropriate table below. Complete one table of maximum one page for the beneficiary and half a page per partner organisation (min font size: 9). The experts will be instructed to disregard content above this limit.

Beneficiary X	
General Description	
Role and Commitment of key persons (supervisor)	<i>(Including names, title, qualifications of the supervisor)</i>
Key Research Facilities, Infrastructure and Equipment	<i>(Demonstrate that the team has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to recruited Experienced Researcher)</i>
Independent research premises?	
Previous Involvement in Research and Training Programmes	
Current involvement in Research and Training Programmes	<i>(Detail the EU and/or national research and training actions in which the partner is currently participating)</i>
Relevant Publications and/or research/innovation products	<i>(Max 5)</i>

2. Excellence



2.4 Capacity of the researcher to reach and re-enforce a position of professional maturity in research

Please keep in mind that the fellowships will be awarded to the most talented researchers as shown by their ideas and their track record, where it is a fair indicator given their level of experience.

3. Impact



3.1 *Enhancing research- and innovation-related human resources, skills, and working conditions to realise the potential of individuals and to provide new career perspectives*

In this section, please explain the impact of the research and training on the *Experienced Researcher's* career. The fellowship, including any secondments in Europe should maximise the impact on the researcher's activity on European society, including the science base and/or the economy, in a manner appropriate to the research field.

3. Impact



3.2 *Effectiveness of the proposed measures for communication and results dissemination*

Required sub-headings:

- **Communication and public engagement strategy of the action**
- **Dissemination of the research results**
- **Exploitation of results and intellectual property**

Concrete plans for the above must be included in the Gantt Chart.

The new knowledge generated by the action should be used wherever possible to enhance the career of the researcher, to advance research, to foster innovation, and to promote the research profession to the public.

4. Implementation



4.1 Overall coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

The proposal should be designed in the optimal way to achieve the desired impact.

A Gantt Chart should be included in the text where the following should be listed:

- Work Packages description;
- List of major deliverables;
- List of major milestones;
- Secondments if applicable.

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

4. Implementation



4.2 *Appropriateness of the management structure and procedures, including quality management and risk management*

Develop your proposal according to the following lines:

- Project organisation and management structure, including the financial management strategy, as well as the progress monitoring mechanisms put in place;
- Risks that might endanger reaching project objectives and the contingency plans to be put in place should risk occur.

The following could be also included in the Gantt Chart:

- Progress monitoring;
- Risk management;
- Intellectual Property Rights (IPR).

4. Implementation



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

Give a description of each legal entity and its main tasks.

Explain why the fellowship has the maximum chance of a successful outcome.

NB: Each participant is described in Section 6. This specific information should not be repeated here.

4. Implementation



4.4 ***Competences, experience and complementarity of the participating organisations and institutional commitment***

Here describe how the fellowship will be beneficial for both the Experienced Researcher and host organisation(s).

Commitment of beneficiary and partner organisations to the programme (for partner organisations, please see also section 6 and 8).

Partner organisations: The role of partner organisations in Third Countries for GF and their active contribution to the research and training activities should be described. A letter of commitment shall also be provided in Section 8 (included within the PDF file of part B, but outside the page limit).

STOP PAGE COUNT

5. CV of the EXPERIENCED RESEARCHER



5. CV of the Experienced Researcher

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 Researchers* must provide a list of achievements reflecting their track, and this may include, if applicable:

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

6. CAPACITIES OF THE PARTICIPATING ORGANISATIONS



All organisations (whether beneficiary or partner organisation) must complete the appropriate table below. Complete one table of maximum one page for the beneficiary and half a page per partner organisation (min font size: 9). The experts will be instructed to disregard content above this limit.

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Independent research premises?	
Previous Involvement in Research and Training Programmes	
Current involvement in Research and Training Programmes	<i>(Detail the EU and/or national research and training actions in which the partner is currently participating)</i>
Relevant Publications and/or research/innovation products	<i>(Max 5)</i>

Operational Capacity Check

You have to confirm whether participants have the basic operational capacity to carry out the project.

How?

Look at the information in the proposal, in particular:

- Table on capacity of the participating organisations (Part B5)

Ask yourself:

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

7. ETHICAL ASPECTS



Ethics Self – Assessment (if applicable)

- 1- HUMAN EMBRYOS/FOETUSES**
- 2- HUMANS**
- 3- HUMAN CELLS / TISSUES**
- 4- PROTECTION OF PERSONAL DATA**
- 5- ANIMALS**
- 6- THIRD COUNTRIES**
- 7- ENVIRONMENTAL PROTECTION AND SAFETY**
- 8- DUAL USE**
- 9- MISUSE**
- 10- OTHER ETHICS ISSUES**



Ethics Self-Assessment by the applicant

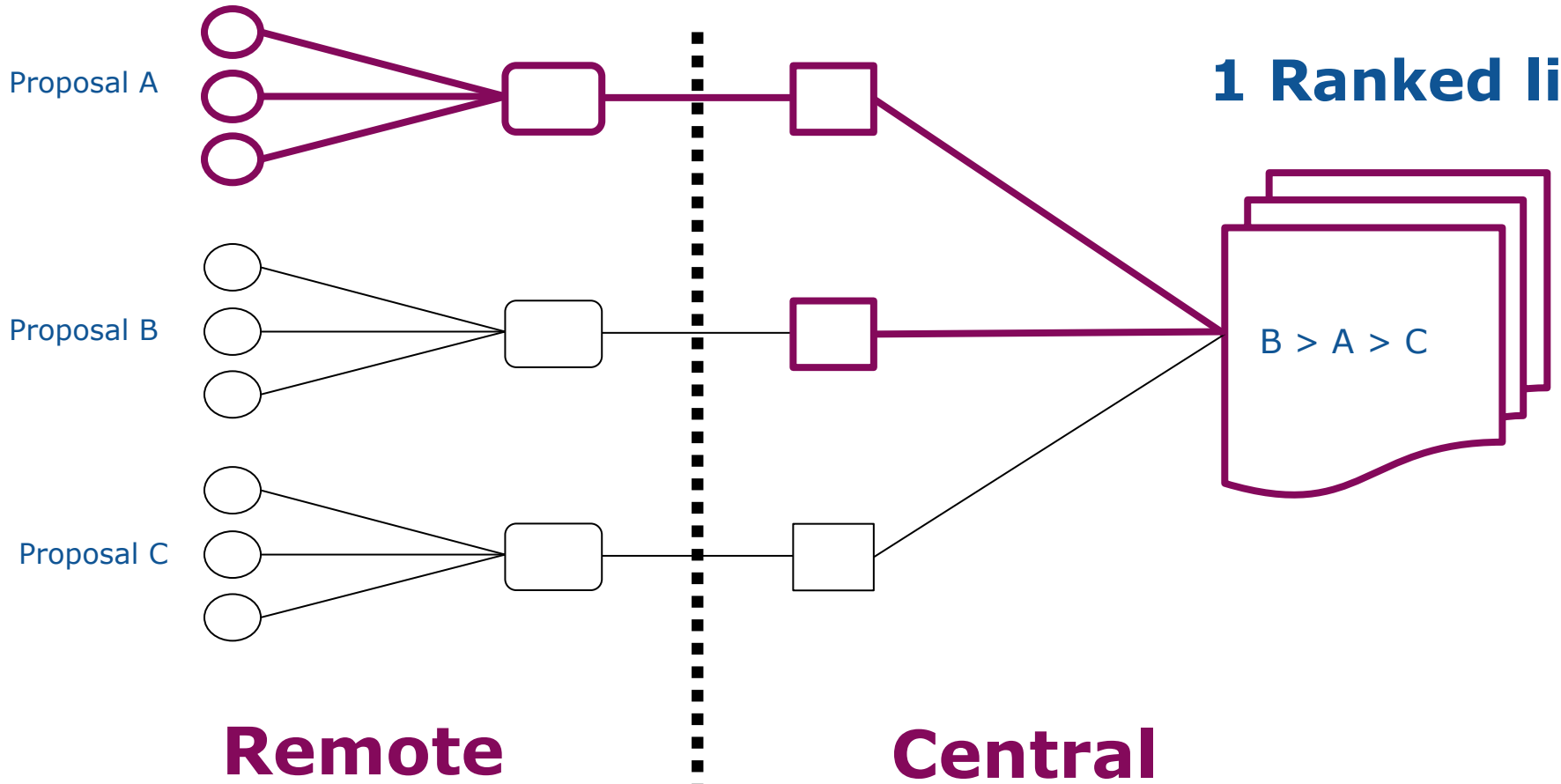


- Each applicant is responsible for:
 - ✓ **identifying** any potential ethics issues
 - ✓ **handling** ethical aspects of their proposal
 - ✓ **detailing** how they plan to address them in sufficient detail already at the proposal stage.
- The Ethics part of each proposal should include description of issues and how the applicants plan to deal with them (Ethic Issues Table in part A, Ethics Self-Assessment in part B)

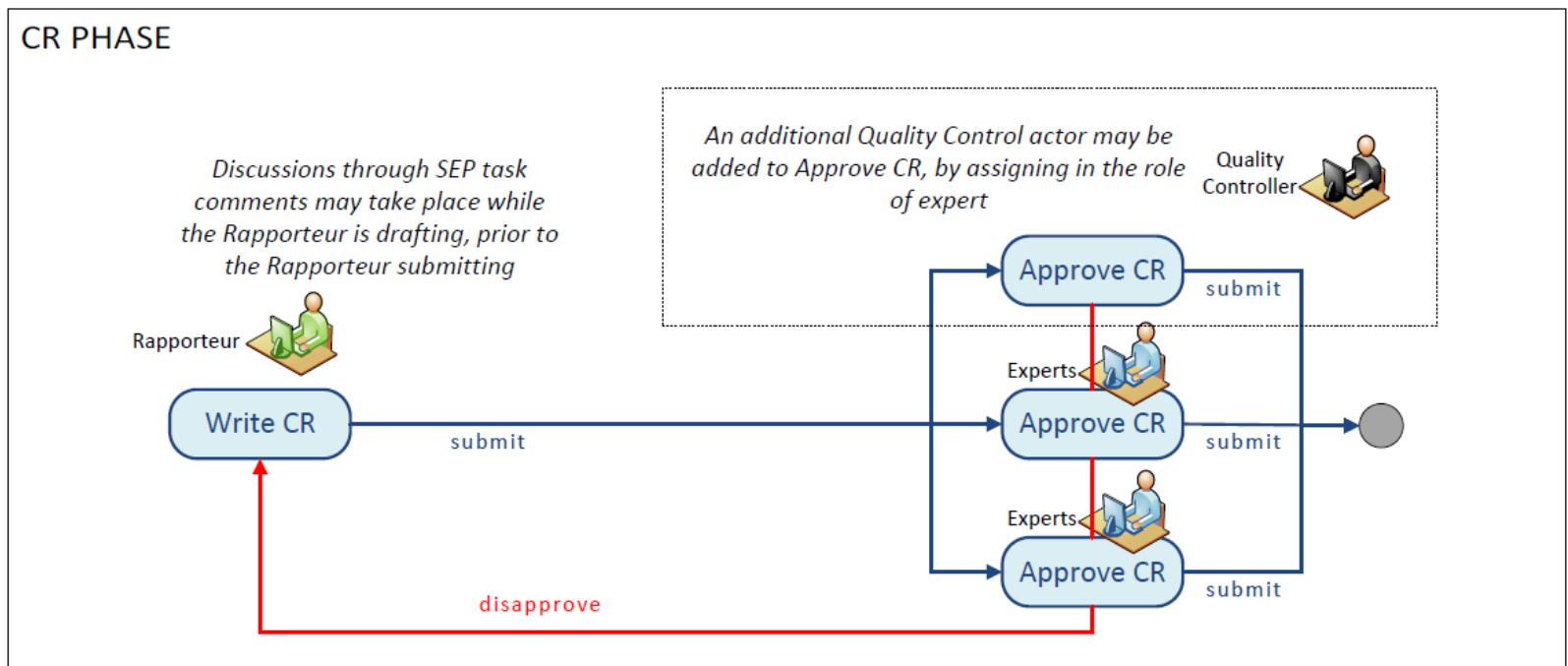
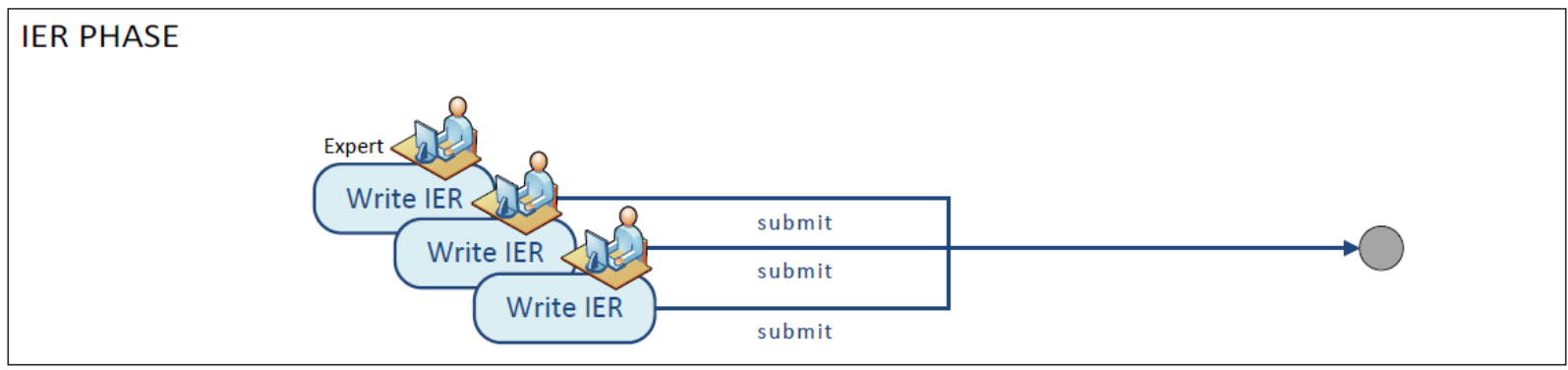
3 Individual Assessments

1 Consensus

1 Ranked list



Workflow overview





- Clearly indicated in Guide for Applicants
- Excess pages to be disregarded in evaluation
- Page limits flagged in SEP (task comments)

LIST OF PARTICIPANTS

START PAGE COUNT

1. SUMMARY
2. EXCELLENCE
3. IMPACT
4. IMPLEMENTATION

10 pages max

STOP PAGE COUNT

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- **European Fellowships, Standard** - presentation, eligibility criteria
- **Proposals in EF-ST: Structure, Evaluation Criteria**
- **Evaluation 2014: SEP workflow, schedule, deadlines**

How to write a good report: IER, CR

- **Roles** of Chairs, Vice-Chairs, Experts, Rapporteurs, Independent Observers, Project Officers, Team Leaders
- **Your contract**
- **SEP guidance**
- **Q&A**

Overview of evaluation criteria

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

Full scoring scale (including decimals) to be used consistent with the comments

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

5

Excellent

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

4

Very Good

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

3

Good

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

2

Fair

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

1

Poor

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

0

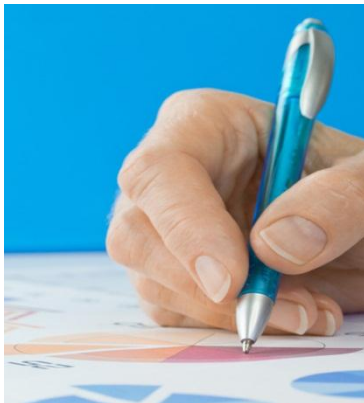
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1.0



Preparing your individual evaluation report (IER)

- Under each criterion (Excellence, Impact and Implementation) **list strengths and weaknesses in bullet point format.**
 - You should comment on each element.

Example: Criterion 1. EXCELLENCE



Element I:

- *Strength A*
- *Weakness B*

Element II:

- *Strength X*
- *Weakness Y*

Score: 3.5

Preparing the consensus report (CR)

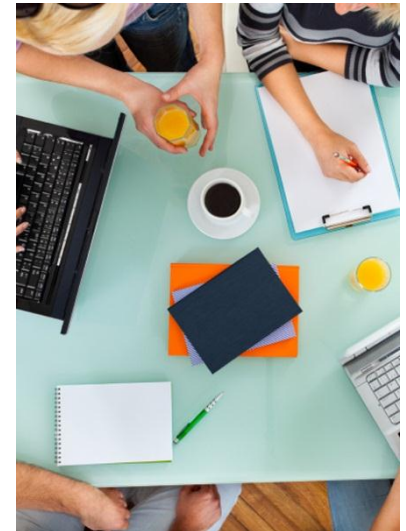
- **The rapporteur** merges the IERs.
- The rapporteur creates a draft based on the comments from the IERs and identifies any points for discussion:

Strengths, Weaknesses, To be discussed.

- The experts agree on the strengths and weaknesses for the 3 evaluation criteria.
- The experts assign a score for each criterion.
- For the CR, experts must provide overall comments on the relative importance of the strengths and weaknesses.

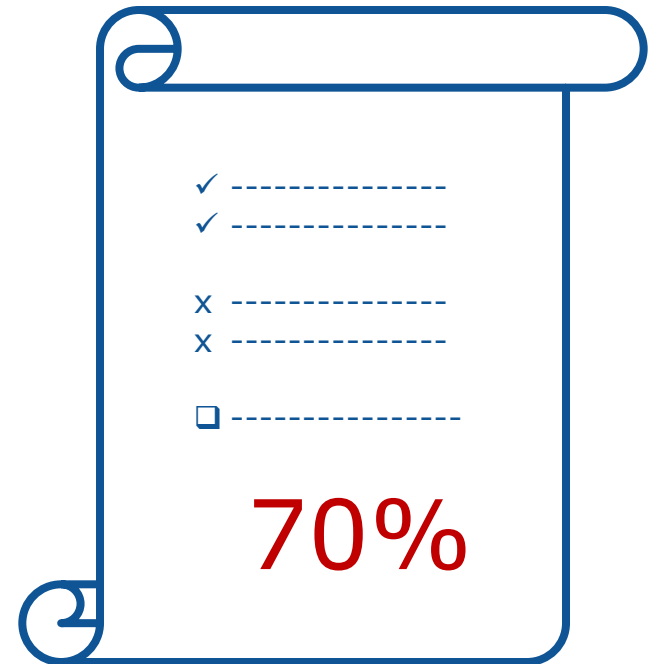
'This proposal is very good overall on this criterion. Its strengths are A, B and C. Its shortcoming is D.'

Score = 4.0



Scoring

- Score each criterion from 0 up to 5.
- No minimum score for the individual criteria.
 - Threshold: 70% of total weighted score.
- Total score will be calculated automatically.



Good vs. poor comments

- Comments must be:
 - Specific to the relevant criterion
 - Clear and substantial
 - Facts, not opinions: ✗ "We think that..." ✓ "This proposal is... "
 - Consistent with the score, balancing strengths and weaknesses
 - Of adequate length: not just one sentence, not a booklet!
- Comments judge the proposal, they do not summarise it.
- Do not provide advice on improving the proposal.



Poor comments merely echo the score

“The innovative aspects of the research programme are poor”.

Poor comments are ambiguous

“The resources for the project are unrealistic”



Good comments explain it

“This proposal is not innovative in X or Y, and it does not take Z into account”.

Good comments are clear

“The resources are seriously underestimated given the complexity of the activity proposed”.



Poor comments are vague, subject to interpretation

“We think the management plan is probably inadequate given the duration of the project and the number of partners”.



Good comments are precise and final

“The management plan is inadequate. It does not include clear overall responsibility for the training activities; it lacks a problem-solving mechanism in the event of disputes between partners”.



Poor comments are inaccurate and provide an opening for a complaint

“There is no discussion of a dissemination strategy.”

“The coordinator is not adequately experienced.”



Good comments close the question

“Dissemination activities are listed but the proposal lacks a clear dissemination strategy”.

“The coordinator does not demonstrate in the proposal an adequate level of experience in this field.”



**Poor comments
include words like...**

Perhaps
Think
Seems
Assume
Probably



**Good comments
include words like...**

Because
Percent
Specifically
For example

Expanded vocabulary



Insufficient, minimal, fails to describe, unacceptable, inadequate, very generic, not evident, unfocused, very weak, bad, does not meet the requirements, inappropriate, limited, unclear, not sound enough, not specified, no significant impact, unjustified, overestimated ...



Extremely relevant, credible, very clear, precisely specified, realistic, very innovative, extremely well suited, timely, convincing, comprehensive, high quality, justified, very well identified, strong, highly effective, thoughtful, very promising, evidence, well-formulated, carefully prepared, very professionally prepared, fully in line, very profound, sound, very convincingly integrated, clearly articulated, coherent, well balanced, very plausible, ambitious, clear advances, well above average ...