

Individual Fellowships Marie Skłodowska-Curie Actions MSCA IF 2018 Call – Tips for a good proposal

Cristina Gómez – National Contact Point (NCP) MSCA

Bilbao, May, 8th 2018



CONTENT

- I. Excellence
- II. Impact
- III. Implementation
- IV. Useful documents and resources



I. MSCA IF 2018: Evaluation criteria

Evaluation Criteria

Criteria	Weight	Priority (ex.aequo)
Excellence	50%	1
Impact	30%	2
Implementation	20%	3

Threshold: 70%

No individual thresholds

Part B-1:
The start page and table of contents are no longer part of the template NEW

Part B-1:

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

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

Of the maximum 10 pages applied to sections 1, 2 and 3, applicants are free to decide on the allocation of pages between the sections. However, the overall page limit will be strictly applied: after the call deadline, excess pages will automatically be made invisible, and will not be taken into consideration by the experts.

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

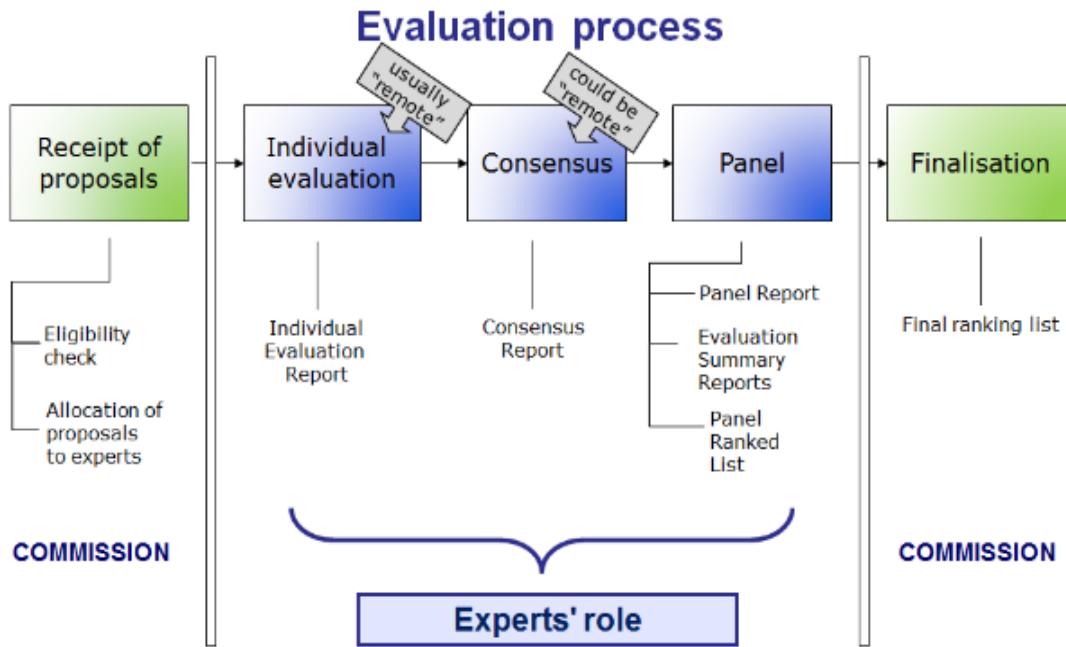
Part B-2:

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

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

I. MSCA: Evaluation Process

The diagram below depicts the main steps of the evaluation process and highlights at which stages the experts intervene.



FULL REMOTE EVALUATION

- 3 evaluators per proposal;
- 2 Vice-Chairs (VCs) of which 1 is rapporteur, and 1 cross-reader;
- **SEP Hands-on Training for VCs;**
- **Improved briefing for experts:** web-briefing (unconscious bias added), Q&A chat sessions, evaluators guide, SEP guidance movie;
- **SEP workflow and functionalities** adjusted to ease the remote consensus discussion;
- **Minority views:** Specific slots for teleconferences will be foreseen in order to solve critical cases remotely, before the central phase.

I. Evaluation: Scoring the proposal

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

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

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

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

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

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



Full scoring scale consistent with the comments

I. Evaluation: Individual Evaluation Report

Each expert draft a IER (individual evaluation report) for each proposal assigned

In the IER:

List **strengths and weaknesses** in bullet point format

- Under each sub-criterion
- For each criterion (excellence, Impact and Implementation)

They will Score each Criterion

1. EXCELLENCE Quality, innovative aspects and credibility of the research (including interdisciplinarity aspects)
Strengths: + ... + ...
Weaknesses: - ... - ...
Clarity and quality of transfer of knowledge/training for the development of researcher in light of the research objectives
Strengths: + ... + ...
Weaknesses: - ... - ...
Quality of the supervision and the hosting arrangement
Strengths: + ... + ...
Weaknesses: - ... - ...
Capacity of the researcher to reach or re-entice a position of professional maturity in research
Strengths: + ... + ...
Weaknesses: - ... - ...
Score (out of 5) 4,2



oficina
europea

I. Evaluation Criteria: Document 1 – PART B

IF - Marie Skłodowska-Curie Individual Fellowships		
Excellence	Impact	Quality and efficiency of the implementation
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the future career prospects of the researcher after the fellowship NEW	Coherence and effectiveness of the work plan NEW Including appropriateness of the allocation of tasks and resources
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the 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
Potential of the researcher to reach or reinforce a position of professional maturity/independence		Appropriateness of the institutional environment (infrastructure)

I. MSCA IF 2018: Excellence

EXCELLENCE
<p>Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects</p>
<p>Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host</p>
<p>Quality of the supervision and of the integration in the team/institution</p>
<p>Potential of the researcher to reach or re-enforce a position of professional maturity/independence</p>

- Estado del Arte bien planteado, objetivos claros, metodología excelente
- Originalidad y aspectos innovadores: avances en el campo científico
- Cuidar aspectos de innovación en género si aplican

Doble transferencia de conocimiento, Caso GF: no hay que olvidar el retorno a Europa

- Experiencia supervisor (publicaciones, visibilidad internacional...)
- Integración ER en la institución (carrera investigadora...)

Demostrar cómo las competencias y experiencia le ayudarán, en el marco del proyecto, a alcanzar la madurez profesional

I. MSCA IF 2018: Excellence

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

Evaluators will assess:

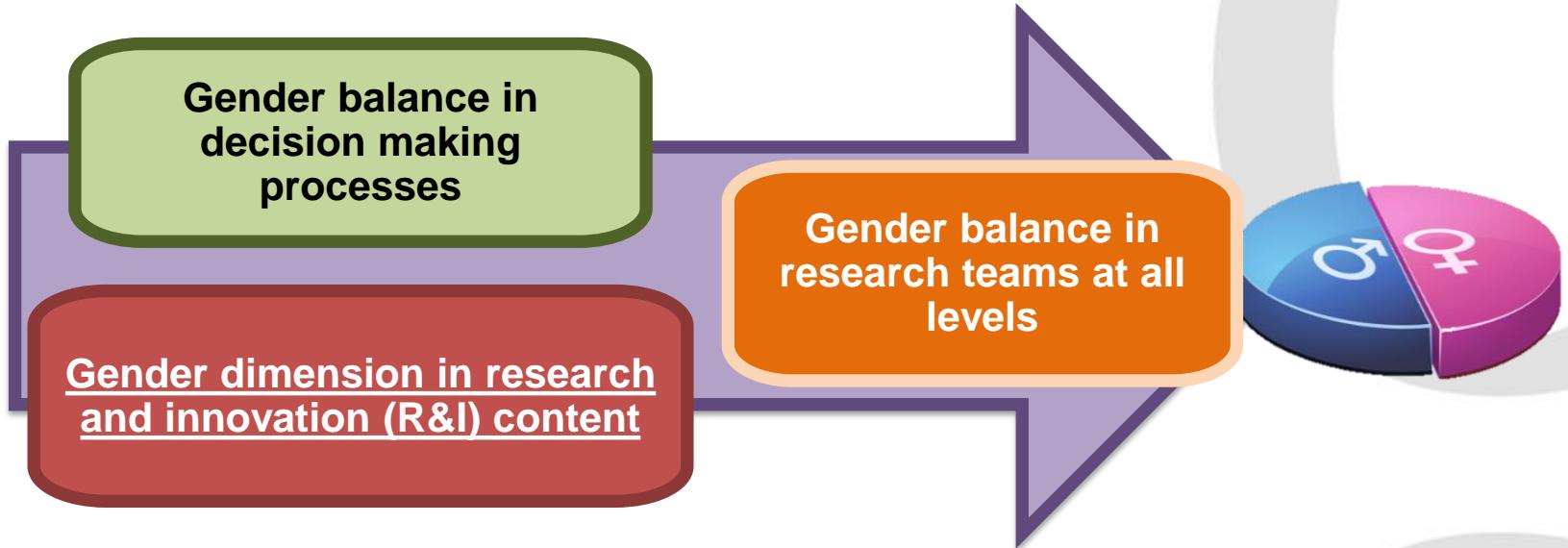
1. State of the art, objectives and overview of the action
2. Research methodology and approach
3. The type of research and innovation activities proposed
4. Originality and innovative aspects of the research programme
5. Gender dimension and interdisciplinary aspects

Objective: to assess how the high-quality, novel research is most likely to open up the best career possibilities for the Researchers and new collaboration opportunities for the host organization.

I. MSCA IF 2018: RRI aspects



I. Gender aspects



Gender Equality as a **cross-cutting issue** in Horizon 2020 and its three objectives:

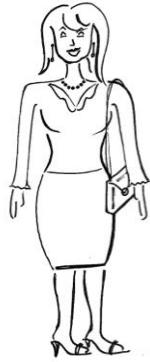
- ✓ **Gender dimension in Research & Innovation content**
- ✓ **Gender balance** in decision-making in managing Horizon 2020
- ✓ **Gender balance** and equal opportunities in **project teams** at all levels



FUNDACIÓN ESPAÑOLA
PARA LA CIENCIA
Y LA TECNOLOGÍA

oficina
europea

I. Gender aspects



Sex refers to biological characteristics of women and men, boys and girls, in terms of reproductive organs and functions based on chromosomal complement and physiology. As such, sex is globally understood as the classification of living beings as male and female, and intersexed.

Gender refers to the social construction of women and men, of femininity and masculinity, which varies in time and place, and between cultures.

I. Gender aspects

Gender dimension in research and innovation (R&I) content

- Gender dimension in research content means **integrating sex and gender analysis into research**.
- In other words, **taking into account** biological characteristics and social/cultural features of both women and men in R&I.
- It is an **added-value** in terms of innovation, creativity, excellence and returns on investments



I. MSCA IF 2018: Excellence

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

Evaluators will assess:

1. The two way transfer of knowledge between the researcher and the host institution, in view of their future development and past experience:
 - How the researcher will gain new knowledge from the hosting organization during the fellowship training
 - Transfer from the researcher to the host organization of the knowledge ad skill previously acquired.
2. For **Global Fellowships**: how the new skills and knowledge acquired in the Third Country will be transferred back to the host institution in Europe.

I. MSCA IF 2018: Excellence

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

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

+ Career Development Plan information to be included under this section

NEW



I. MSCA IF 2018: Excellence

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

Evaluators will assess:

1. The **qualification** and **experience** of the supervisor(s):

- The level of experience of the supervision on the research topic proposed;
- Track record of work, including the main international collaboration.
- Participation in project, publication, patents and any other relevant results.

2. The **hosting arrangements**; the integration of the researcher to his/her new environment in the premises of the Host. This is not about the infrastructure.



I. MSCA IF 2018: Excellence

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

Researchers should **demonstrate** how their existing professional experience, talents and the proposed research will contribute to their development as independent/mature researchers, **during the fellowship**. Explain the new competences and skills that will be acquired and how they relate to the researcher's existing professional experience.

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.

I. Excellence section: strengths and weaknesses



“The proposed research is of very high quality utilising cutting-edge approaches.”

“The training activities are well described and have specific, important and credible scientific objectives, complementing the researcher’s background.”

“Scientific quality & originality are excellent”

“The approach is perfectly suited to achieve the objectives.”

“The project is original and innovative, and the timeliness matches the European and international research areas.”

“It is an innovative and very interesting proposal with the potential to make a significant contribution to the field.”

“The proposal is vague in terms of working methods, theories and scientific hypotheses.”

“The proposal does not provide sufficient information to demonstrate that the research project has the potential to be applied more generally.”

“The advancement of the state of the art that the project is expected to make lacks detailed justification.”

“The description of the training objectives lacks detail.”

“The proposal does not present sufficient data to assess the advantages and drawbacks of the proposed methods.”

II. MSCA IF 208: Impact

IMPACT

Enhancing the future career prospects of the researcher after the fellowship

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

Quality of the proposed measures to **communicate** the project activities to different target audiences

- Explicar el impacto esperado y previsto en aspectos formativos y de investigación de cara al futuro, una vez finalizado el proyecto
- Cómo las nuevas competencias y habilidades adquiridas (explicadas en el punto 1.4) facilitarán una mejora en la carrera investigadora

- Estrategia de diseminación de los resultados, publicación en Open Access
- IPR: estado de la Técnica, prever generación de patentes
- Acciones de comunicación hacia el público general, compromiso público.

II. MSCA IF 2018: Impact

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

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

- ✓ Articulate clearly the advantages of this fellowship for your personal career development.
- ✓ Demonstrate to what extent competences acquired during the fellowship (described in Excellence), including any secondments, will maximise the impact on the researcher's future career prospects = describing the impact they will have
- ✓ Present the way in which the fellowship will contribute in the medium and long term to the development of the researcher's career.
- ✓ How will the training received help broaden – diversify the researcher's career and skillset?
- ✓ What's the next step in your career
- ✓ What do you learn in the IF to get there?
- ✓ What will you have achieved after the project?

II. MSCA IF 2018: RRI aspects



II. MSCA IF 2018: Communication vs. Dissemination

Dissemination (section 2.2)	Communication (section 2.3)
About <u>results only</u>	About the project and results
Audiences that may use the results in their own work e.g. peers (scientific or the project's own community), industry and other commercial actors, professional organisations, policymakers	Multiple audiences beyond the project's own community (include the media and the public)
Enable use and uptake of results	Inform and reach out to society , show the benefits of research
Grant Agreement art. 29	Grant Agreement art. 38.1
When results are available	Starts at the outset of the project

II. MSCA IF 2018: Communication Vs. Dissemination

What are the audiences we are addressing our messages to:

- Scientific Community
- Stakeholders
- Policy makers
- Final Users
- Industry...

**DISSEMINATION
EXPLORATION**

- General Public / Society

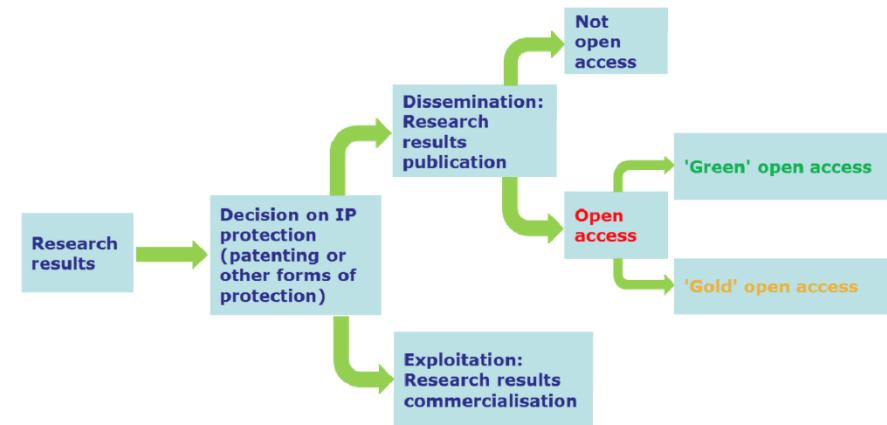
**COMMUNICATION
OUTREACH**



II. Open Science – Open Access (section 2.2)

- Applicants and beneficiaries should respect the **Horizon 2020 strategic priority of Open Science**.
- **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**.

Open Science also provides significant new **opportunities for researchers to disseminate**, share, explore and collaborate with other researchers.



<https://ec.europa.eu/programmes/horizon2020/en/h2020-section/open-science-open-access>



II. Outreach/Public Engagement (section 2.3)

- Las **actividades de divulgación** se desarrollan para atraer a una **audiencia amplia** sobre un tema específico principalmente al público general
- Las actividades de divulgación se pueden desarrollar de diversas maneras; **presentaciones en colegios, talleres, charlas, visitas a laboratorios, etc.**
- El objetivo es explicar los **beneficios de la investigación a un público amplio** (principalmente ciudadanos que pagan nuestras investigaciones con sus impuestos)
- La divulgación implica **interacción** entre el investigador y el receptor, hay una relación entre ambos y la comunicación que se mantiene es de “ida y vuelta”



II. Communication (section 2.3)

- La **Comunicación**, es bidireccional desde el investigador hacia el receptor y viceversa.
- Por Comunicación se entiende **artículos en periódicos o revistas generalistas, TV o Radio**. Es fundamental el uso de las **redes sociales** en esta comunicación.
- Una comunicación exitosa requiere un **lenguaje claro**, una **temática científica atractiva** donde se remarquen resultados interesantes para atraer la atención tanto del público general como de los medios.

<http://www.irishtimes.com/news/health/fat-fighter-1.538013>

http://www.lemonde.fr/arts/article/2015/03/17/projet-mossoul-un-musee-virtuel-pour-reagir-face-a-la-barbarie-de-l-etat-islamique_4595546_1655012.html

<https://projectmosul.org/>

<https://www.youtube.com/watch?v=znMRm8FHa7A>



How to Crowdsource the Reconstruction
of Lost Heritage

On June 8th, we enjoyed the opportunity to share Rekrei's developments at the annual TEDx event in Hamburg, Germany. It was a pleasure to share the collaborative effort of our many volunteers and partners. Thanks to the Economist Media Lab, we also had 3D printed objects for the audience to witness up close following the talk.

We'd like to thank the organizers for the invitation and the audience who showed so much enthusiasm towards collaborative efforts for preserving the memory of lost heritage.

II. How to disseminate and communicate

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

Evaluators will assess:

Communication and public engagement **strategy** of the action

- RRI (Responsible Research and Innovation)
- EU and international collaboration achieves more
- How the ER get **feedback from citizens**
- **Real commitment** from the Host Institution and from the fellow
- **Highlight previous experiences** in Host Institution
- Remark fellows' profile on outreach, communication and public engagement
- Frequency and nature of communication activities

II. Impact section: strengths and weaknesses



"The proposal clearly describes how the completion of the project and the acquired skills will improve the career prospects of the applicant."

"The proposal demonstrates convincingly how the fellowship will contribute to the development of the applicant's career, particularly in terms of international links and potential future international collaborations."

"The relevance and quality of additional research training as well as of transferable skills offered are clearly demonstrated."

"The outreach activities are described in detail and include knowledge transfer to undergraduate students, press articles and workshops."

"Much of the work to be done is a continuation of previous work of the applicant, which limits its impact on their career."

"It is not comprehensively explained in the proposal how the training provided will influence the researcher's career development."

"The relevance and quality of transferable skills offered are not substantiated."

"The outreach plan is rather vague and lacks detail of how the public would be engaged through each activity."

III. MSCA IF 2018: Implementation

IMPLEMENTATION

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

- WPs, tareas y recursos asignados
- Deliverables / Milestones
- Adecuación de los recursos: Asignar P/M a paquetes de trabajo
- Importante: Gantt chart Visual y comprensible

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

- Estructura de gestión (mecanismo de seguimiento, apoyo RRHH – OPEs...)
- Planes de contingencia (visual: tabla...)

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

Adecuación de las infraestructuras, acceso a recursos / instalaciones /

III. MSCA IF 2018: Implementation

3.1 Coherence and effectiveness of the work plan, including 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 number of person-months planned and requested for the project is appropriate in relation to the proposed activities.

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

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

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

IMPORTANCE OF A GOOD GANTT CHART.

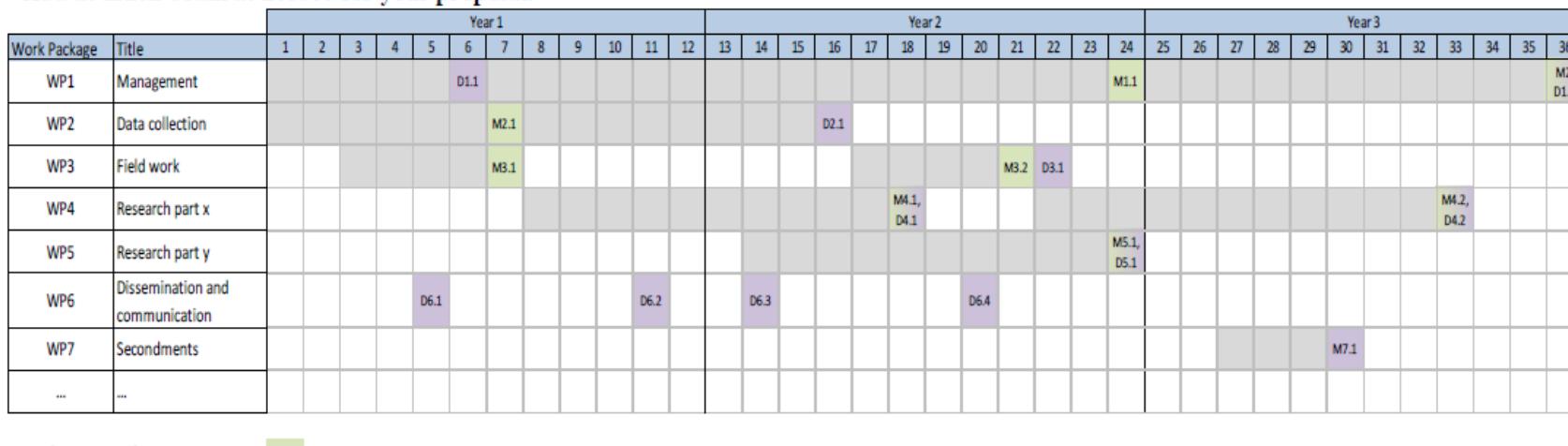
III. MSCA IF 2018: Implementation

IMPORTANCE OF A GOOD GANTT CHART.

This is an example Gantt chart only.

Notes:

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



Legend	Milestone	M
	Deliverable	D

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

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

III. MSCA IF 2018: Implementation

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

The evaluator will assess:

1. The **project organization** and **management structure**, including the **financial management** strategy and the progress monitoring mechanism
2. Remark possible risks for project objectives and concrete contingency plan and mitigation actions.

Your institution services here is **crucial**. Work together with your colleagues from Project Office or Tech Transfer Office.

III. MSCA IF 2018: Implementation

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

The evaluator will assess:

1. Main tasks and commitments of the beneficiary and partner organization with the project. For GF also the role of partner organisations in Third Countries for the outgoing
2. The infrastructure, logistics, facilities offered to the fellow for the good implementation of the action
3. Section 5 (Capacities of the participating organizations) is evaluated here.

III. Implementation section: strengths and weaknesses



“The work-plan is credible, comprehensive and well-structured for both periods at the outgoing and return institutes.”

“A very detailed work plan is given, which includes milestones and deliverables. Project is highly feasible and credible.”

“The technical objectives of the implementation plan are clearly identified.”

“The fellow will have access to outstanding equipment, collaboration network and high level academic associations.”

“Despite the ambitious nature of the project a credible timeline has been demonstrated.”

“Despite the clear contingency plan, aim 1 will be very challenging and the proposal does not convincingly demonstrate that sufficient time has been allocated for its completion.”

“A very ambitious project at an appropriate institution, but the description of actually how the desired aims would be achieved is not very clear.”

“The overall work plan is overambitious.”

“The work plan is presented in terms of key events, but it is not clear 'how' these will be managed, monitored and achieved.”

“The quality of the host's infrastructure is not assessed against the specific needs set out for the execution of the project.”

III. In a nutshell: When preparing a proposal

- Read the Call Documents:**
 - ✓ Work Programme, Guide for Applicants, Horizontal Issues: Gender / Ethic Issues, etc, FAQ
- Use the official template:**
 - ✓ Include the information where requested, evaluators will look at all headings and sub-headings
 - ✓ **“Una imagen vale más que mil palabras”:** use visuals to provide global information at a glance.
 - ✓ Be aware of all criteria weight, it is not all about Excellence!
- Ask for support:**
 - ✓ Own institution: **European Projects Offices** / Transfer of Technology Offices / HR Departments
 - ✓ Evaluation Summary Reports (ESR) available
 - ✓ National Contact Points (+ doc. Compiled)
- Do not leave it for the last minute!**
 - ✓ Get familiar with the Participants' Portal
 - ✓ Upload a version, you will be able to rewrite it.



IV. Documentation and useful links



FUNDACIÓN ESPAÑOLA
PARA LA CIENCIA
Y LA TECNOLOGÍA

oficina
europea

IV. Resources on gender issues /expertise

"Gendered Innovations" <http://ec.europa.eu/research/gendered-innovations/>

employs methods of sex and gender analysis to create new knowledge.

GenPORT

On-line community of practitioners for sharing knowledge and inspire collaboration

www.genderportal.eu

Gender Toolkit

<http://www.yellowwindow.be/genderinresearch/>

Cost Action GenderSTE

<http://www.genderste.eu>

More videos:

- Introduction to Gendered Innovations

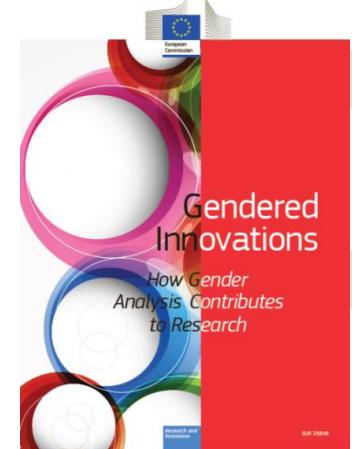
<https://www.youtube.com/watch?v=aoGqpVO27QQ&feature=youtu.be>

- Definition of sex and gender & how sex and gender interact

<https://www.youtube.com/watch?v=nETPIfrlfOA&feature=youtu.be>

- Understanding gender dimension for MSCA projects

<https://www.youtube.com/watch?v=Hq4eWo30RfY>



IV. Resources on Science Communication & Dissemination

- Communicating EU Research & Innovation - Guidance for project participant"
http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-comm_en.pdf
- The Plan for the Exploitation and Dissemination of Results in Horizon 2020
https://www.iprhelpdesk.eu/sites/default/files/newsdocuments/FS-Plan-for-the-exploitation-and-dissemination-of-results_1.pdf
- Outreach and Communication Activities in the MSCA under Horizon 2020
http://ec.europa.eu/assets/eac/msca/documents/documentation/publications/outreach_activities_en.pdf
- Guidelines on Open Access to Scientific Publications and Research Data in Horizon 2020
https://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/oa_pilot/h2020-hi-oa-pilot-guide_en.pdf
- Open Access in Horizon 2020
<https://www.openaire.eu/h2020openaccess/>



FUNDACIÓN ESPAÑOLA
PARA LA CIENCIA
Y LA TECNOLOGÍA

oficina
europea

¡Muchas gracias! Thank you!

USEFUL LINKS

- Research and Innovation Participants' Portal : <http://ec.europa.eu/research/participants/portal/desktop/en/home.html>
- Web and Blog Marie Curie Skłodowska-Curie Actions: <http://mariecurieactions.blogspot.com.es/> - <http://www.madrimasd.org/blogs/msca>
- European Charter & Code: http://ec.europa.eu/euraxess/pdf/brochure_rights/eur_21620_es-en.pdf
- EURAXESS Spain: <http://www.euraxess.es/>
- Oficina Europea MINECO/FECYT: <http://eshorizonte2020.es>

Cristina Gómez

Oficina Europea FECYT / MINECO

cristina.gomez@oficinaeuropea.es

Cristina Gracia

Oficina Europea FECYT / MINECO

cristina.gracia@fecyt.es

Jesús Rojo

Fundación para el Conocimiento madri+d

jesus.rojo@madrimasd.org