MARIE SKŁODOWSKA-CURIE INDIVIDUAL FELLOWSHIPS 2016

23.3.2016
Research & Innovation Services,
ris@jyu.fi
# Marie Skłodowska-Curie Actions

<table>
<thead>
<tr>
<th>Program</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Innovative Training Networks, ITN</strong></td>
<td>- Funding for doctoral training networks &lt;br&gt;- Applicants academic or non-academic sector actors based in different countries &lt;br&gt;- Open recruitment of doctoral students to the network</td>
</tr>
<tr>
<td><strong>Cofunding of regional, national and international programmes COFUND</strong></td>
<td>- Co-funding of (national) doctoral and fellowship programmes (max 50%) &lt;br&gt;- Applicant is a single organisation or a network, which already has existing doctoral or fellowship programmes &lt;br&gt;- Open recruitment of doctoral students, international peer review of fellowships</td>
</tr>
<tr>
<td><strong>Research and Innovation Staff Exchange RISE</strong></td>
<td>- Short-term exchange of existing staff members (max 12 months/person) &lt;br&gt;- Salaries are not covered &lt;br&gt;- Inter-sectoral and international (third countries) co-operation</td>
</tr>
<tr>
<td><strong>Individual Fellowships IF</strong></td>
<td>- Applicant is an individual researcher together with host organisation &lt;br&gt;- From Europe to any country, from any country to Europe &lt;br&gt;- For experienced researcher: PhD degree or at least four years of research experience after MSc</td>
</tr>
<tr>
<td><strong>Researchers’ Night</strong></td>
<td>- Support for organizing public events targeted to general public to stimulate interest in research careers &lt;br&gt;- Europe-wide event every September &lt;br&gt;- Applicant is an individual organisation or a consortium</td>
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</tbody>
</table>
What is the main objective of Individual Fellowships (IF)?

- Support individual researchers at postdoctoral level and beyond to work on a research project of their own design that advances their careers.

- Mobility between countries is required in order to acquire new skills and experience, as well as to enhance the employability of the supported researcher in the future.

- Mobility between academic and non-academic sectors is also encouraged where this increases the impact of the fellowship.
What are the IF opportunities for academic organisations?

- The fellowships enable organisations to host highly talented researchers, whose proposals are competitively peer-reviewed inter alia on the basis of research excellence.
- The researchers must have a certain amount of experience in the profession.
- They will bring experience from elsewhere in Europe or possibly beyond.
- An additional advantage to the host organisation is that the IF grant provides a complete financing package:
  - up to two (EF) or up to three (GF) years of living, mobility and family allowances for the benefit of the individual researcher, as well as support to the host organisation for research costs, management and overheads.
**MSCA – Individual Fellowships (IF)**
- next deadline 14.9.2016

<table>
<thead>
<tr>
<th>European Fellowships</th>
<th>Global Fellowships</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration between 12 and 24 months</td>
<td>Duration between 24 and 36 months</td>
</tr>
<tr>
<td>12-24 months outgoing phase in TC + 12 months mandatory return period in EU/AC</td>
<td></td>
</tr>
<tr>
<td>Host organisation = target organisation, situated in EU/AC</td>
<td>Host organisation in EU/AC, partner organisation in TC</td>
</tr>
<tr>
<td>For all nationalities without limitations</td>
<td>For all EU/AC nationalities without limitations, for TC nationalities long-term residence (5 yrs) in EU/AC required</td>
</tr>
<tr>
<td>Secondments in EU/AC possible</td>
<td>Secondments in EU/AC possible</td>
</tr>
</tbody>
</table>

30 March 2016
MSCA IF – European and Global Fellowships

European Fellowships
-12 -24 months
-Secondments

Global Fellowships
-24-36 months, including compulsory return 12 months
Call Information H2020-MSCA-IF-2016 (218,5 M €)

- Deadline 14-09-2016 17:00:00 (Brussels local time)
- MSCA Work Programme 2016-17 pages 12-15
- Participant Portal call information, guidance documents
  - proposal submission service with templates
  - Guide for Applicants
- EU funding for career development guide (TIP)

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Individual fellowship

Secondment

MOBILITY

SHARE

QUALITY

Feasible

Specific

Clarity

Experience

Transferable skills

TIMELY

INTERACTION

Competitive

Mentoring

Controlled risks

Exposure to the industry

Credible

Your career

Scientific excellence

IMPORTANT QUESTION

Co-operation

Integration into team

Multidisciplinary

Performance indicators

LEARN, GROW, SHARE

SYNERGIES

Well structured plan

COLLABORATION

TRAINING

Impact

Your career
IF application procedure

- Proposals for IFs involve a single host organisation (future beneficiary) established in a MS or AC.
- The project proposals should be prepared by the researcher in liaison with the host organisation, which is represented by the supervisor.
- It is important to note that the Experienced Researcher (future fellow) and the supervisor must be two different people.
- The submission of the proposals falls under the full responsibility of the supervisor.
- Technically it is possible for both the researcher and the supervisor to create, modify and submit the proposal in the electronic submission system SEP. However it must be emphasised that the submission by the researcher must be made with the agreement of the supervisor.
- Associated Countries in H2020 programme

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Structure of IF

- **Beneficiary**
  - The beneficiary is the *host organisation established 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 executing the action.

- **Partner Organisations**
  - Partner organisations are institutions that provide additional training and host the researcher during *secondments*.
  - **NO recruitment, no signing of GA, no cost claims**
  - Instead, the beneficiary would need to reimburse the partner organisations for their activities in the research training.
  - The partner organisations located in MS and AC should NOT provide any supporting documents (e.g. letter of commitment).
  - For Global Fellowships only, the partner organisation located outside the MSs or ACs must include an up-to-date letter of commitment in Part B of the proposal to demonstrate their real and active participation in the proposed action; their precise role should also be clearly described in the proposal.

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## Participants in IF

**Beneficiary** located in Europe
- Member States **MS**
- Associated Countries **AC**

**Partner organisations** in MS or AC
- Global Fellowship an obligatory partner organisation in Third Country **TC**

### Minimum country participation in an IF

<table>
<thead>
<tr>
<th></th>
<th><strong>Beneficiaries</strong></th>
<th><strong>Partner organisations</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>European Fellowships</strong></td>
<td>Obligatory: 1 beneficiary in MS or AC</td>
<td>Optional: partner organisation(s) in MS or AC</td>
</tr>
<tr>
<td><strong>Global Fellowships</strong></td>
<td>Obligatory: 1 beneficiary in MS or AC</td>
<td>Obligatory: 1 partner organisation in TC</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Optional: partner organisation(s) in MS or AC</td>
</tr>
</tbody>
</table>

30 March 2016
Eligibility criteria

- Only one proposal per *experienced researcher* can be submitted!
- **Mobility Rule**: the researcher must move or have moved from any country to the MS or AC where the beneficiary is located.
  - The researcher must not have resided or carried out his/her main activity (work, studies, etc.) in the country of the host organisation (GF = target country of initial outgoing phase) for more than 12 months in the 3 years immediately prior to the deadline for submission of proposals.
  - In the Career Restart Panel (CAR) and Reintegration Panel (RI) the researcher must not have resided or carried out the main activity (work, studies, etc.) in the country of the host organisation for more than 36 months in the 5 years immediately prior to the deadline for submission of proposals. For the RI, there shall also be mobility into the country of the Beneficiary.
- **Global Fellowships**:
  - The partner organisation in a *Third Country* must include an up-to-date letter of commitment in Part B of the proposal to demonstrate its real and active participation in the proposed action, and its precise role should also be clearly described in the proposal.
  - A mandatory return phase for the researcher (*future fellow*) in the European host organisation is essential for the successful achievement of the objectives of this action.

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Duration & Mobility

- The duration for European Fellowships (standard EFs, CAR and RI) is between 12 and 24 months.
- For the Global Fellowships there is a first outgoing phase between 12 and 24 months, and an additional mandatory 12 months return phase, so the total duration of this type of fellowship is between 24 and 36 months.
- Mobility is considered by the European Commission essential 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, thereby contributing to career development and a successful, competitive knowledge-based society.
- Mobility is an eligibility criterion for receiving Marie Skłodowska-Curie funding.

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Training and Development requirements

- The **Experienced Researcher** should develop in the proposal a concrete plan of *training-through-research* at the host organisation’s premises.
- The plan 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, intersectoral experience and transferable skills.
- In addition to research objectives, this plan comprises the researcher’s training and career needs, including training on transferable skills, planning for publications and participation in conferences.
- This dedicated and high-level plan will act as a reference for the Experienced Researcher to monitor for her/himself the progress of work, training and publications, and to take corrective measures if deviations and delays are observed in order to attain the professional development targets.

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Typical training activities in IF

- Primarily, *training-through-research* under the direct supervision of the supervisor and other members of the scientific staff of the host organisation by the means of an 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.);
- Intersectoral 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.

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Secondments

- During the implementation of the IF the Experienced Researcher may be seconded to another institution in Europe. Such secondments must significantly contribute to the impact of the fellowship and therefore in certain research fields, secondments would be expected to take place in the non-academic sector.
- The organisation where the secondment takes place is a partner organisation and must be located in the Member States or Associated Countries.
- 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.
- The secondments must be clearly justified in the Part B of the proposal and their maximum duration is defined according to the total duration of the fellowship:

30 March 2016
Secondments

<table>
<thead>
<tr>
<th>Duration of the Fellowships</th>
<th>Maximum duration of secondment</th>
</tr>
</thead>
<tbody>
<tr>
<td>≤ 18 months</td>
<td>3 months</td>
</tr>
<tr>
<td>&gt; 18 months</td>
<td>6 months</td>
</tr>
</tbody>
</table>

- To another institution in Europe.
- A short visit is not a secondment!
- The secondment phase can be a single period or be divided into shorter mobility periods.
- The secondment should significantly add to the impact of the fellowship.
- Meaningful and appropriate involvement of non-academic sector.
Allowances and cost structure of IF

<table>
<thead>
<tr>
<th>Researcher unit cost person / month</th>
<th>Institutional unit cost person / month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living allowance</td>
<td>Mobility allowance</td>
</tr>
<tr>
<td>Family allowance</td>
<td>Research, training and networking costs</td>
</tr>
<tr>
<td>4 650*</td>
<td>600</td>
</tr>
<tr>
<td>500</td>
<td>800</td>
</tr>
</tbody>
</table>

Living allowance in Finland (116,6 %) € → estimated monthly gross salary with mobility allowance is some €4 600 and with Family allowance some €5 000.

The living allowance is a **gross EU contribution** to the salary costs of the researcher. Consequently, 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 family status of a researcher will be determined at the deadline of the call (i.e. 10 September 2016) and will not be revised during the lifetime of the action.
Unit costs

- Unit cost is a pre-calculated in estimated budget
- **1 researcher month = 1 unit**
- Total = unit costs* x number of units
- **Underpayments will not be accepted.**

**Research, training and networking costs**
- This unit cost amounts to **€800 per person/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 costs;
  - execution of the project.

**Management and indirect costs**
- This refers to a unit cost of **€650 per person/month** that is to be used for the management and indirect costs of the action.

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<table>
<thead>
<tr>
<th>INDIVIDUAL FELLOWSHIPS</th>
<th>EUROPEAN</th>
<th>GLOBAL</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Standard EF</td>
<td>CAR</td>
</tr>
<tr>
<td>Nationality</td>
<td>ANY</td>
<td>ANY</td>
</tr>
<tr>
<td>Mobility</td>
<td>From ANY country to MS or AC</td>
<td>From ANY country to MS or AC</td>
</tr>
<tr>
<td></td>
<td>&lt; 12 months in the last 3 years</td>
<td>&lt; 36 months in the last 5 years</td>
</tr>
<tr>
<td>Career break in research</td>
<td>-</td>
<td>≥ 12 months prior to call deadline</td>
</tr>
<tr>
<td>Beneficiary</td>
<td>MS or AC</td>
<td>MS or AC</td>
</tr>
<tr>
<td>Partner Organisation</td>
<td>MS or AC (optional secondments)</td>
<td>MS or AC (optional secondments)</td>
</tr>
<tr>
<td>DURATION (months)</td>
<td>12 - 24</td>
<td>12 - 24</td>
</tr>
<tr>
<td>SCIENTIFIC PANELS/AREAS</td>
<td>8 panels</td>
<td>8 areas</td>
</tr>
<tr>
<td>NUMBER OF RANKING LISTS</td>
<td>8</td>
<td>1</td>
</tr>
<tr>
<td>BUDGET (total € 215 million)</td>
<td>€ 188 million</td>
<td>€ 188 million</td>
</tr>
</tbody>
</table>
Lessons learned from the first calls
Source: Katharina Horst, NCP Luxembourg

- Elaborate on each and every point of the evaluation criteria
  - Address each specific criterion as defined in the next chapters.
  - The evaluator will spot the weak points of the proposal and those that the applicant has deliberately or inadvertently omitted.
  - Evaluators will give high marks to proposals which are complete, coherent and detailed.

- Strengths may not outweigh weaknesses
  - Each evaluation report highlights both strengths and weaknesses. In fact, the strengths of the proposal will be acknowledged even though the overall proposal is deemed insufficient.
  - The strengths of your proposal might not make up the weaknesses.

- Perfection is possible
  - It is possible to submit a flawless proposal.
  - Good drafting and the conscientious treatment of all aspects do not escape the evaluators’ attention.
Lessons Excellence part

- Research quality and soundness of the concept are the basis of excellence
- Original and innovative approach is needed
- Timely and relevant scope (in the EU and beyond) and public engagement
- Tell the evaluators why you are an excellent researcher
- The host institution matters (added value to your research)
- Multi- and interdisciplinarity
Impact lessons

- Clear objectives for research training
- IF contribution to your career development
- Focus on specific (rather than generic) actions and skills
- Cross-sector mobility ~ link to industry / non-academic sector
- European dimension (excellence, competitiveness)
- Host organisation and team commitment and expertise
- Gain transferable skills with genuine mobility
- Concrete public outreach activities
And implementation lessons

- When? Where? Feasibility!
- Deliverables and milestones help the evaluators
- Consistent plan for transfer of knowledge
- Research environment
- Risk management
- Networking
Future training events

- MSCA Individual Fellowship info day, 10.5.2016 at 12.00-15.00, Agora Gamma
- MSCA IF Workshops in August for applicants (finetune your application) 22.8. and 29.8. at 14.00 – 16.00.

30 March 2016
RIS services

- Training event and workshops for potential applicants/PIs
- Comments for draft applications
- Helpdesk for call specific questions
- Guidance for filling the administrative A-forms
Contact information

- www.jyu.fi