

MARIE SKŁODOWSKA-CURIE **ACTIONS**

Individual Fellowships (IF)

Dr. Renat Bilyalov Research Executive Agency

> 16-17 May 2019 **Ankara-Istanbul**

Research Executive Agency

MSCA in H2020



Marie Skłodowska-Curie Actions



ITN Innovative

Training Networks What does it offer?

High-quality research training delivered through international and interdisciplinary networks, industrial doctorates or joint doctorates

Who applies?

International networks of research organisations from the academic and nonacademic sectors

Who is funded?

Researchers at doctoral level (less than four years of full-time research experience and no doctoral degree)



IF

Individual Fellowships

What does it offer?

Opportunities to work on personal research projects by moving between countries and possibly sectors to acquire new skills

Who applies?

Individual researchers together with the host organisation

Who is funded?

Postdoctoral researchers



RISE

Research and Innovation Staff Exchange

What does it offer?

The exchange of staff members involved in research and innovation to develop sustainable collaborative projects and the transfer of knowledge

Who applies?

International networks of research organisations from the academic and non-academic sectors

Who is funded?

Researchers, technical, administrative and managerial staff of any nationality and at all career levels



COFUND

Co-Funding of Regional, National and International Programmes

What does it offer?

Regional, national or international programmes to foster excellence in researchers' training, mobility and career development

Who applies?

Organisations funding or managing doctoral programmes or fellowship programmes

Who is funded?

Researchers at doctoral and postdoctoral level





- Individual Fellowships
 - Key concepts
 - European Fellowships
 - Global Fellowships
 - Novelties
- Submission & Evaluation
 - Proposals part A and B
 - Evaluation criteria & process
- Calls update
 - IF-2018 Results & IF-Statistics
 - IF-2019: Topics, Budget & Planning
- Useful links



What are Individual Fellowships?



What are IFs?

Individual trans-national fellowships to the best and most promising experienced* researchers (* with PhD or 4-year full-time equivalent research experience)

European Fellowships Career Restart Panel (ST) Panel (CAR) Re-integratio n Panel (RI) Society & Enterprise Panel (SE)

Global Fellowships

- ✓ **Secondments** of 3 6 months in Europe (MS or AC), for greater impact
- ✓ Specific eligibility criteria
- Career development with an appropriate inter-sectoral dimension



What are Individual Fellowships?



A researcher may submit only one proposal to this call for proposals.





European Fellowships



For fellows coming to or moving within Europe duration 12-36 months for CAR duration 12-24 months for other EF







Global Fellowships

For fellows from Europe going to third countries (12-24 months) & returning to Europe (12 months)



Total duration 24-36 months



Which countries?



Member States (MS)

Associated Countries (AC):

Iceland, Norway, Albania, Bosnia and Herzegovina, former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia

Third Countries (TC): any other country



Which sectors?



Academic

Public or private **Higher Education establishment**awarding academic degrees

Public or private non-profit research organisations

International European interest organisations

Universities

Non-profit research institutes

IEIOs

Non-academic

Broad definition:

Any socio-economic actor not included in the academic sector definition



EU Validation Services ultimately determine the sector of each participating organisation



What is a "Project"?



A project:

- is written by the experienced researcher
- includes a concrete plan of training-through-research
- is implemented in the host organisation's premises
- is under the direct supervision of the Supervisor(s)

It should have realistic and well-defined objectives in terms of career advancement or for resuming a research career after a break.



What is a "Project"?



Typical training activities may include:

- training-through-research: individual personalised action
- Hands-on training activities for developing scientific (new techniques, instruments) and transferable skills (proposal preparation to request funding, IPR management, task coordination, supervising & monitoring, exploitation of research results)
- Inter-sectoral or interdisciplinary transfer of knowledge (e.g. through secondments)
- Organisation of scientific/training/dissemination events
- Communication, outreach activities and horizontal skills
- Training dedicated to gender issues



What is the financial contribution?



Individual Fellowships	Researcher unit cost [person/month]			Institutional unit cost [person/month]		
	Living allowance*	Mobility allowance	Family allowance	Research, training & networking costs	Management & indirect costs	
	4.880 EUR	600 EUR	500 EUR	800 EUR	650 EUR	

^{*}adjusted through the application of a country correction coefficient (BE= 100%) - see the Work Programme 2019



What are secondments?



A transfer of knowledge which contributes significantly to the impact of the fellowship.

Fellowship Duration	Maximum duration of secondment			
≤ 18 months	3 months			
> 18 months	6 months			

- Should be clearly described in proposal
- Can be a single period or divided into multiple shorter periods
- Can be at more than one partner organisation located in MS/AC
- Can be to an institution in the same country as the beneficiary
- Can be in the same sector although intersectoral secondment is highly encouraged
- No letter of commitment is needed.
- Different from short visit (e.g. field work), which can be done in a TC.

A special rule for **Global Fellowships** applies in duly justified cases.





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European Fellowships



An experienced researcher applies with a host institution for a research project that can last between 12 and 24/36 months*

Host Institution (future Beneficiary)

* 12 to 36 months for CAR, 12 to 24 months for other EF

Location: MS or AC

Sector: Academic or Non-academic

- Can be International European Interest Organisation (IEIO)
- Can be International Organisation (exceptional cases)
- Appoints the Supervisor
- Recruits the experienced researcher (with a contract of employment)

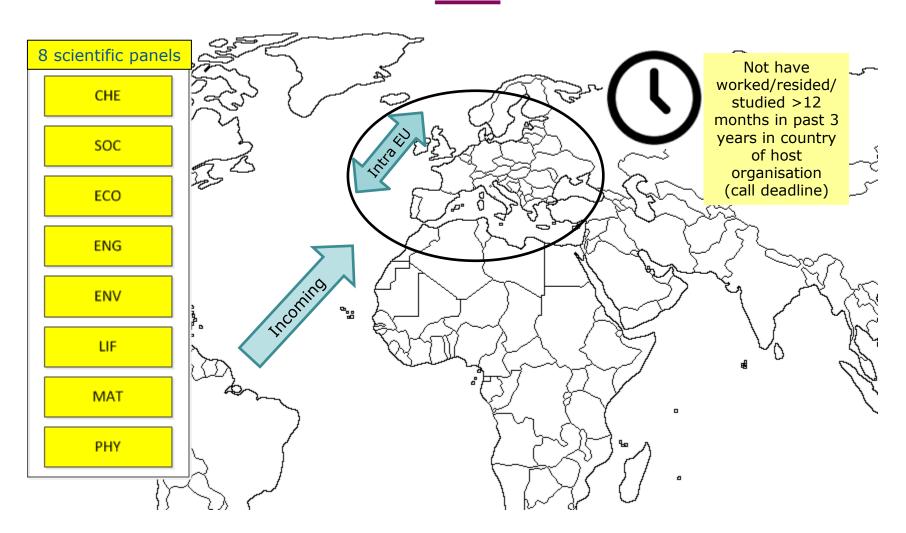
Researcher (future Fellow)

- Must undertake transnational mobility
- Can be of any nationality (with the exception of the Re-Integration panel)



EF - Standard



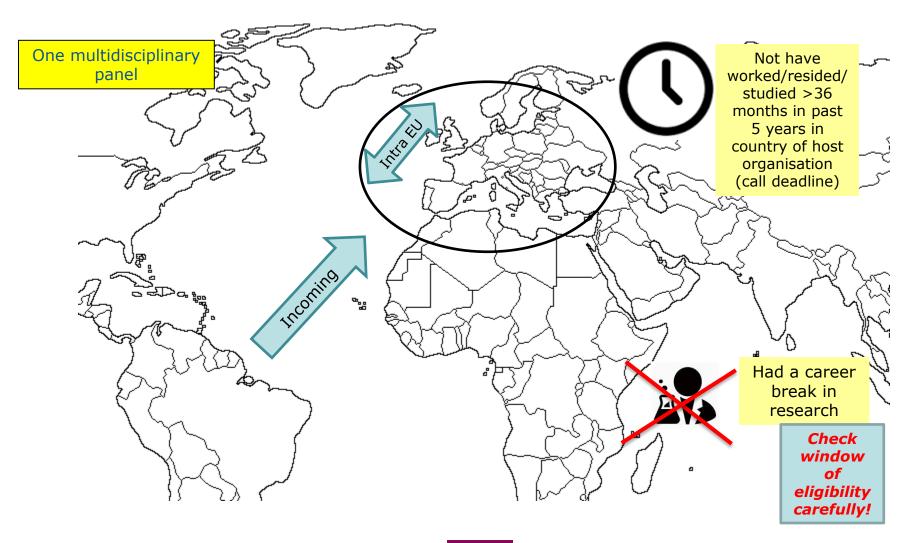




EF - Career Restart Panel

Schema







EF – Career Restart Panel



Definition of **CAREER BREAK** in research:

Not have been active in research for at least 12 consecutive months within the 18 months immediately prior to the deadline for submission of proposals.

Active in research means

- being employed in research, or
- holding a scholarship in research

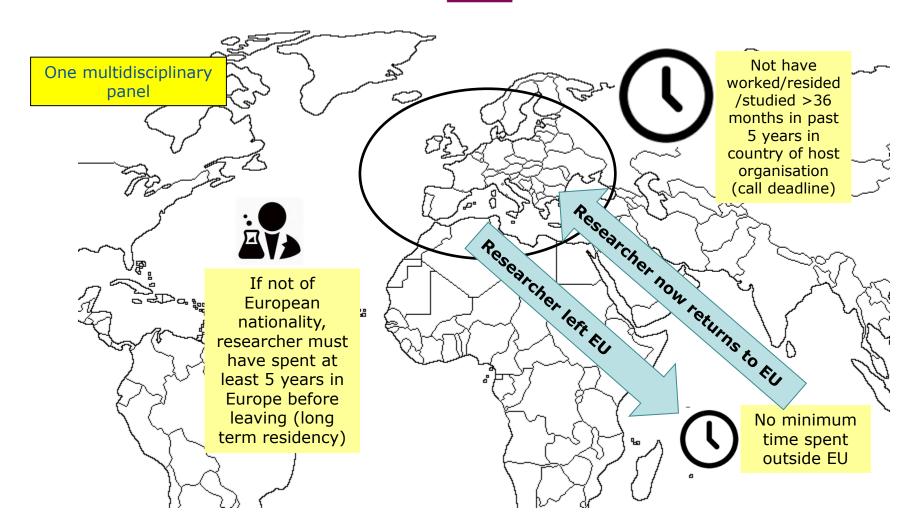
The **professional status** should be clearly explained in the proposal, both **in part A and B**, e.g. unemployment, parental leave, sick leave, periods of employment outside of research



Schema

EF – Re-Integration Panel



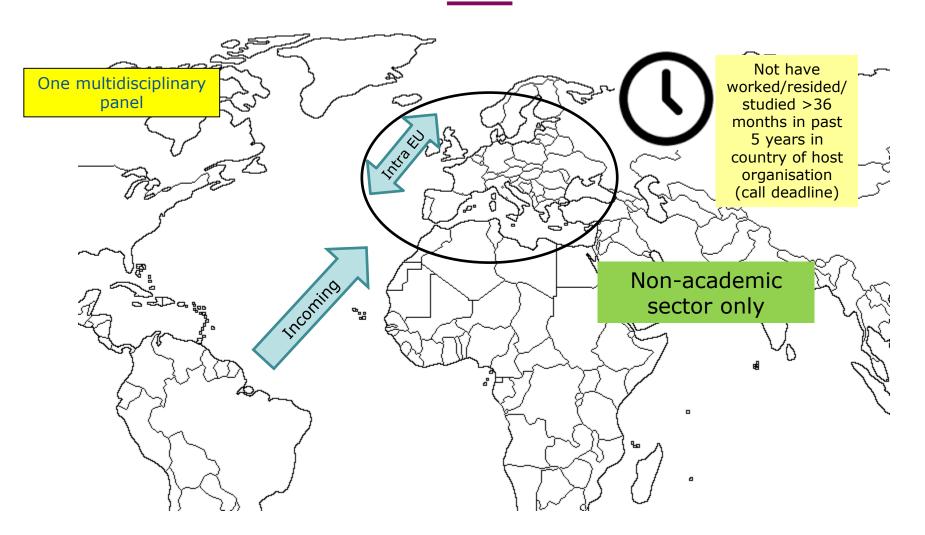




Schema

EF - Society & Enterprise







EF – Society & Enterprise



Beneficiary from the non-academic sector only:

- industry and business (including SMEs)
- government
- civil society organisations (NGOs, trusts, foundations, etc.)
- cultural institutions and museums
- hospitals
- ...

ONLY APPLY FOR THIS PANEL WHEN CERTAIN FUTURE HOST IS NON-ACADEMIC

Earmarked budget of 8 million €





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Global Fellowships



An experienced researcher applies with a host institution for a research project that can last between 24 and 36 months (12-24 months initial outgoing phase in a Third Country + 12 months of mandatory return phase)

Host Institution (future Beneficiary)

Same as in EF!

- Location: MS or AC
- Sector: Academic or Non-academic
- Can be International European Interest Organisation (IEIO)
- Can be International Organisation (exceptional cases)
- Appoints the Supervisor
- Recruits the experienced researcher (with a contract of employment)





Partner Organisation

Different from EF!

- Location: Third Country (not MS or AC)
- Sector: Academic or Non-academic
- Can be an International Organisation
- Nominates a Supervisor for the researcher
- Provides a signed Letter of Commitment in the proposal

The partner organisation

- **DOES NOT** sign the Grant Agreement
- **DOES NOT** recruit the researcher
- **DOES NOT** claim costs directly from the action





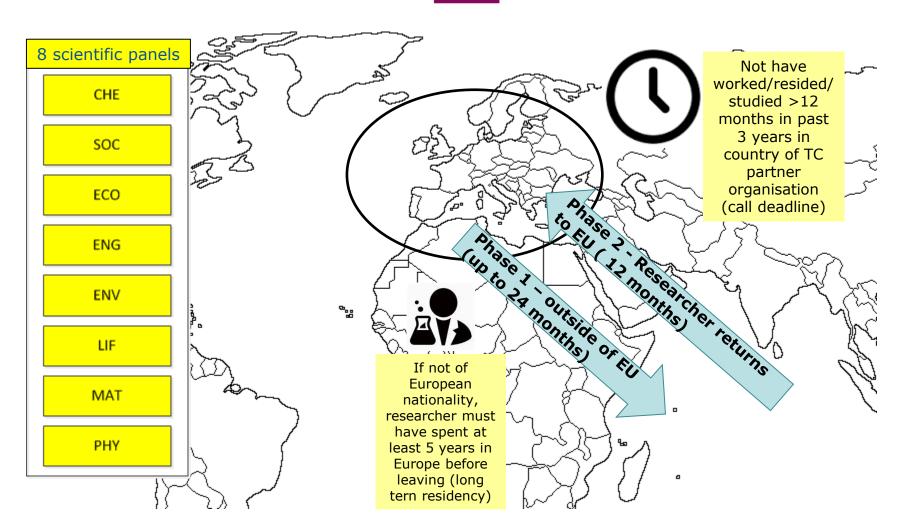
Researcher (future Fellow)

- Must undertake mobility from ANY country to the partner organisation in the Third Country. The researcher cannot have spent more than 3 years in the last 5 years in the Third Country of the partner organisation
- Nationality: national of MS/AC or long-term resident of a MS/AC
- Will be under the direct supervision of two Supervisors



Global Fellowships









!!!!!!!! Document needed only for Global Fellowships !!!!!!!!

The Letter of Commitment has no specific template, but:

- has heading or stamp from the partner organisation
- is up-to-date (i.e. issued after the call publication, 11 April 2019)
- must demonstrate the will to actively participate in the proposed action and the precise role

If no letter of commitment is included in a Global Fellowship proposal, it will be declared inadmissible and will not be evaluated.





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Widening Fellowships



- To attract participation of beneficiaries from widening countries
- Automatic transfer to this call in case the MSCA IF proposal does not reach funding range in the IF ranking
- WF proposal admissibility/eligibility of MSCA IF

New in 2018

Budget



2018: EUR 5 million 2019: EUR 6 million 2020: EUR 7 million

Which countries are concerned?



Member States: Bulgaria, Croatia, Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Luxembourg, Malta, Poland, Portugal, Romania, Slovakia and Slovenia.

Associated Countries: Albania, Armenia, Bosnia and Herzegovina, Faroe Islands, Former Yugoslav Republic of Macedonia, Georgia, Moldova, Montenegro, Serbia, Tunisia, Turkey and Ukraine.

Applicants who wish to be considered for this funding opportunity should opt in during the application stage. Opting in, or out, is a fixed decision at proposal stage and cannot be modified at a later stage!



CAR and RI



New in 2018

The distribution of the indicative budget of the call will be proportional to the number of eligible proposals received in each panel, except where a specific budget for a multidisciplinary panel has been fixed in the call.

However, there is a higher weighting for the proposals of the **IF Career Restart Panel (CAR)** and the **IF Reintegration Panel (RI).** During the budget distribution, the CAR eligible proposals will have a weighting of **2 times** the weighting of the eligible proposals in the other panels. For RI the weighting will be **1.5 times** higher.

	Proposals received	Proportion of proposals before weight	Funded projects before weight	Weight (as per MSCA W.P.)	Weighted proposals	Weight in percentage	funded projects
total EF-ST, EF-CAR, EF-RI	10.000		1.100		11.500		1.100
EF-ST	8.000	80,00%	880,00	1	8.000	69,57%	765
EF-CAR	1.000	10,00%	110,00	2	2.000	17,39%	191
EF-RI	1.000	10,00%	110,00	1,5	1.500	13,04%	143

• Increase in success rate in CAR (from 9.22 % to 17.97%) and RI (from 14.00% to 19.39%)





Individual Fellowships: Part time work for professional reasons



- To pursue supplementary activities, such as creating a business, advanced studies, etc.
- Based on agreement between supervisor and fellow
- Minimum working time in MSC action: ≥50%
- Can be requested during GAP or action implementation not at application stage

Global Fellowships:

Possibility to spend time at the European beneficiary before the outgoing mobility foreseen

Duration: max. 3 months





Teaching will be highlighted

- Teaching explicitly recommended
- Support to teaching by beneficiaries encouraged
- No specific limit will be set due to diversity of teaching cultures

Introductory training for all MSCA fellows

- Training on different skills (Open science, Fair data, Communication, Outreach, etc.)
- Information on their career (possibilities for worldwide collaboration, rights and obligations, EU support for innovation, etc.)





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Funding & tender opportunities Portal



https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

Select your type of action to start submission

To access the Electronic Submission Service, please click on the submission-button next to the type of action that corresponds to the correct entry point.

To access existing draft proposals for this topic, please login to the Funding & Tenders Portal and select the My Proposals page of Type of Action: CAR - Career Restart panel [MSCA-IF-EF-CAR] Start SUBMISSION Type of Action: RI - Reintegration panel [MSCA-IF-EF-RI] Start SUBMISSION Type of Action: Society and Enterprise panel [MSCA-IF-EF-SE] Start SUBMISSION Type of Action: Standard European Fellowship [MSCA-IF-EF-ST] Start SUBMISSION Type of Action: Global Fellowships [MSCA-IF-GF] Start SUBMISSION



Guide for Applicants



The **Guide for Applicants** is available on the <u>call page in</u> the Funding & tenders opportunities Portal.

You should consider this document as the primary base for any information on how to prepare your proposal and what should be discussed for each (sub)criterion.

Please follow <u>all</u> instructions closely, and <u>do not</u> refer to the Guide from a previous call!



Proposal Part A (Submission Forms)



Proposals must be submitted electronically using the Participant Portal.

Part A: administrative details

Section 1 – <u>General Information</u>

- **Section 2** <u>Administrative data</u> of participating organisations (supervisor(s), researcher)
- **Section 3** <u>Budget</u>: information on the duration (person-months) to calculate the total requested EU contribution.
- **Section 4** <u>Ethics</u>: 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.
- **Section 5** <u>Call specific questions</u> request declarations related to eligibility and personal data, together with questions on any secondment in Europe.



Proposal Part B



The "core" of the proposal – the structure below is mandatory

!!DO NOT ADD ANY PAGES AT THE START OF PART B1!!

Part B1 (10-PAGE LIMIT APPLIED)

START PAGE COUNT

EXCELLENCE

2. IMPACT MAX 10 pages

IMPLEMENTATION

STOP PAGE COUNT

Part B2 (NO OVERALL PAGE LIMIT APPLIED)

- 4. CV OF THE EXPERIENCED RESEARCHER
- 5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
- 6. ETHICAL ASPECTS
- 7. LETTERS OF COMMITMENT OF PARTNER ORGANISATIONS

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(GF only)

Proposal Part B



Part B is submitted as **two separate documents** – you will not be able to submit the proposal in the submission system unless both Parts B1 and B2 are provided in pdf format.

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 automatically applied, and <u>excess pages will be blanked out and are irrevocably lost</u>. It is the responsibility of the applicant to verify that the submitted pdf documents are readable and are within the page limit.



Descriptors



Descriptors (keywords) are chosen by applicants to guide REA in selection of experts and allocation of proposals to the experts.

Applicants select the descriptors in order of importance with 1st being the most important, with a minimum of three and a maximum of five descriptors.

The GfA contains a breakdown of scientific areas into descriptors.

Keep in mind:

- The mandatory first descriptor should best characterise the subject of the proposal, and should be chosen from the area of research chosen for the proposal.
- The mandatory second descriptor should be within the same area of research (e.g.: CHE).
- The mandatory third descriptor can be from any of the eight areas of research.
- Applicants may add two additional descriptors chosen freely from any of the eight areas of research.

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Eligibility	critoria		GLOBAL						
Eligibility	Criteria	ST	CAR	RI	SE	GF			
	Nationality	ANY	ANY	MS, AC or long- term residents	ANY	MS, AC or long- term residents			
EXPERIENCED RESEARCHERS	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC directly to MS or AC (location of host institution)	From ANY country to MS or AC	From ANY country to TC then to MS/AC			
RESEARCHERS		<= 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	-	at least 12 months within 18 months prior to call deadline	-	-	-			
	Beneficiary	MS or AC	MS or AC MS or AC		MS or AC Non-academic only	MS or AC			
	Entity with capital or legal link	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC			
PARTICIPANTS	Partner Organisation	MS or AC (optional secondment)	MS or AC (optional secondment)	MS or AC (optional secondment)	MS or AC (optional secondment, both Academic and Non-Academic)	outgoing phase (mandatory) TC MS or AC			
					,	(optional secondment)			
DURATION (months)		12 to 24	12 to 36	12 to 24	12 to 24	24 to 36 (12 to 24 + 12)			
SCIENTIFIC AREAS		8	8	8	8	8			
NUMBER OF RANKING LISTS		8	1	1	1	8			
BUDGET (total €	218.5 million)		€236,49 million	€236,49 million					

Evaluation & Award Criteria



Excellence	Impact	Quality and Efficiency of 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	Coherence and effectiveness of the work plan, 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 management structure and procedures, including risk management
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 institutional environment (infrastructure)
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship		

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



Evaluation & Award Criteria



- 0 Proposal fails to address the criterion and cannot be assessed due to missing or incomplete information.
- 1 Poor. The criterion is inadequately addressed, or there are serious inherent weaknesses.
- 2 Fair. The proposal broadly addresses the criterion, but there are significant weaknesses.
- 3 Good. The 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.



Evaluation & Award Criteria



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

Excellence	Impact	Quality and Efficiency of Implementation					
50%	30%	20%					
Priority in Case of ex-aequo							
1	2	3					

An overall threshold of 70% will be applied to the total weighed score. Proposals under the threshold will be rejected.

Prioritization in case of ex-aequo

- → if necessary based on other appropriate characteristics that are
 - decided by the panel
 - * related to the contribution of the proposal to the European Research Area and/or general objectives mentioned in the Work Programme
- → depends on available budget and call conditions



Evaluation Process



- Each proposal is read and evaluated by **three evaluators** in an individual and independent manner. Each evaluator prepares an *individual evaluation report*.
- The three evaluators discuss together to reach a **unanimous consensus** on the final comments and score, and prepare a *consensus report*, containing relevant elements from the three individual reports.
- The consensus score determines the position on the ranking list.
- Applicants receive their *evaluation summary report* (i.e. a copy of the consensus report) in January.

Full details on the process are available in the <u>Guide</u> for Applicants available on the call page

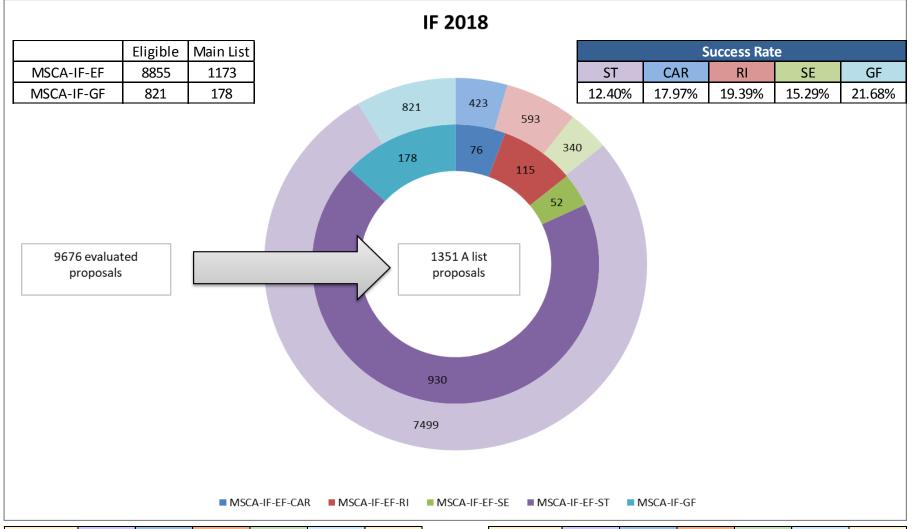


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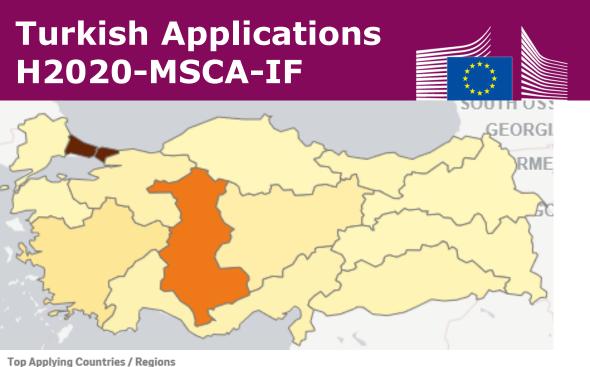
IF-2018: Results



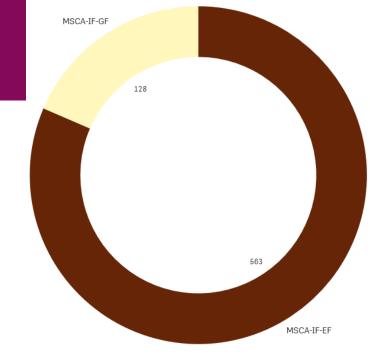


ALL	ST	CAR	RI	SE	GF	TOTAL	
Submitted	7499	423	593	340	821	9676	
Retained	930	76	115	52	178	1351	Research
Success rate	12,40%	17,97%	19,39%	15,29%	21,68%	13,96%	Executiv
,							Agency

TURKEY	ST	CAR	RI	SE	GF	TOTAL
Submitted	24	4	51	1	24	104
Retained	1	0	6	0	2	9
Success rate	4,17%	0,00%	11,76%	0,00%	8,33%	8,65%



Eligible Applications



Retained EU Contribution

Success Rate Proposals

Top Applying Countries / Regions

Eligible Proposals

NUTS 1 Name

Totals	691	691	100,0%	€95.287.293	100,0%	43	43	€ 6.184.831	6,22%
İSTANBUL	359	359	52,0%	€49.861.736	52,3%	22	22	€3.029.199	6,13%
BATI ANADOLU	192	192	27,8%	€26.914.381	28,2%	12	12	€1.784.491	6,25%
EGE	42	42	6,1%	€6.100.225	6,4%	3	3	€449.047	7,14%
-	24	24	3,5%	€3.094.678	3,2%	6	6	€922.093	25,00%

Retained Proposals

Retained Applications

% Eligible EU Contribution

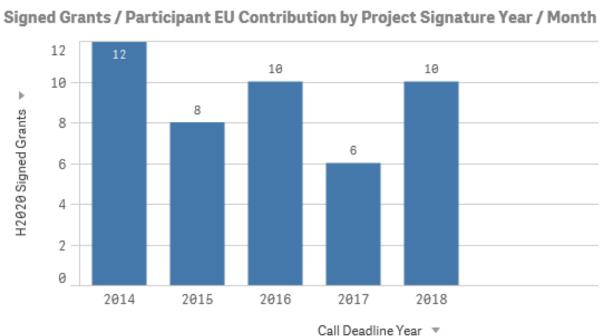
EGE	42	42	6,1%		€6.100.225	6,4%		3		3 €4	49.047	7,14%
-	24	24	3,5%		€3.094.678	3,2%		6		6 €9	22.093	25,00%
Top Applicants												
Legal Name		Q	Country	Q	City Q	Eligib	ole Applications	Eligib	ole EU Contribution	Retained Applications		Retained EU Contribution
Totals							691		€95.287.293	43		€ 6.184.830,76
KOC UNIVERSITY			TR - Turkey	/	ISTANBUL		83		€11.390.581	9		€1.208.276,32
Bilkent Üniversitesi			TR - Turkey	/	ANKARA		66		€9.899.971	4		€607.382,80
MIDDLE EAST TECHNI	CAL UNIVERSITY		TR - Turkey	/	ANKARA		59		€8.032.622	3		€473.047,12
BOGAZICI UNIVERSIT	ESI		TR - Turkey	/	ISTANBUL		44		€6.082.699	1		€78.677,76
OZYEGIN UNIVERSITE	SI		TR - Turkey	/	ALEMDAG CEK		32		€ 4.734.889	1		€157.845,60
SABANCI UNIVERSITE	SI		TR - Turkey	/	ISTANBUL		20		€2.819.243	2		€291.201,12
Sabanci University			TR - Turkey	/	ISTANBUL		23		€2.806.148	1		€78.923,00
BILKENT UNIVERSITES	SIVAKIF		TR - Turkey	/	BILKENT ANKA		16		€2.226.989	2		€230.523,36
ISTANBUL TEKNIK UN	IVERSITESI		TR - Turkey	/	ISTANBUL		15		€2.204.764	1		€145.845,60

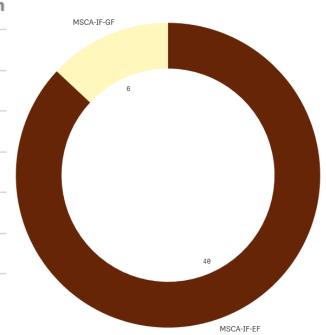




GEOR







Top Participants 17 Host Institutions										
Legal Name	, F	Q	Country	Q	City Q	H2020 Participations	H2020 Net EU Contribution			
Totals						48	€7.177.077			
KOC UNIVERSITY	H20	20	TR - Turkey	7	ISTANBUL	10	€1.383.519			
BILKENT UNIVERSITESI VAKIF	H20	20	TR - Turkey	1	BILKENT ANKARA	8	€1.220.209			
ISTANBUL TEKNIK UNIVERSITESI	H20	20	TR - Turkey	1	MASLAK ISTANBUL	6	€910.584			
MIDDLE EAST TECHNICAL UNIVERSITY	H20	20	TR - Turkey	,	ANKARA	4	€630.892			
SABANCI UNIVERSITESI	H20	20	TR - Turkey	,	ISTANBUL	3	€542.254			
BOGAZICI UNIVERSITESI	H20	20	TR - Turkey	,	ISTANBUL	2	€ 400.443			
VASARTINIVERSITESI	наа	20	TR - Turkey	,	17MIR	2	£ 303 201			



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IF-2019: Topics & Budget



EF

European Fellowships

held in EU Member States or Associated Countries (MS/AC)

244.49 M€

GF

Global Fellowships

to a third country and a return phase in MS/AC

50 M€

Call Opening: 11 April 2019

Call Deadline: **11 September 2019, 17:00:00 CET**

Evaluation: October 2019 – January 2020

Launch Grant preparation: Mid-February 2020



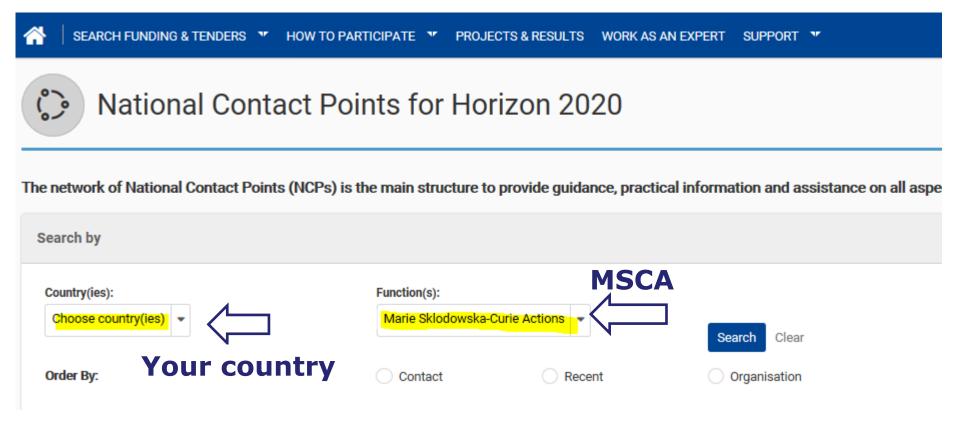


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 - IF-2019: Topics, Budget & Planning
- Useful links





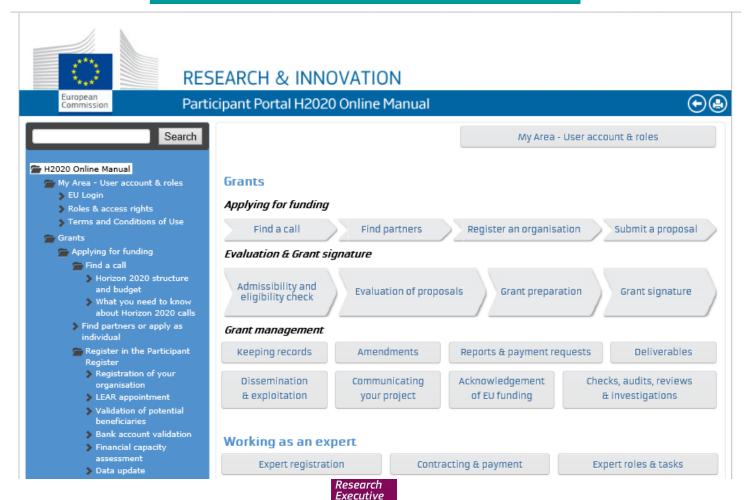
NCP - National Contact Points







H2020 manual



Agency





Marie Skłodowska-Curie Website http://ec.europa.eu/mariecurieactions

Horizon 2020

http://ec.europa.eu/programmes/horizon2020

Funding and Tender Opportunities Portal

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

European Charter and Code for Researchers

http://ec.europa.eu/euraxess/index.cfm/rights/europeanCharter

How to find partners

https://cordis.europa.eu/partners/web/guest





Thank you for your attention!

