Acciones Marie Sklodowska-Curie (MSCA) de Horizonte 2020

Valencia, 8 de abril 2019

_Cristina Gracia, Punto Nacional de Contacto MSCA_
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II. General aspects of Marie Sklodowska-Curie Actions (MSCA)

III. MSCA Calls
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   - Innovative Training Networks (ITN)
   - Research and Innovation Staff Exchange (RISE)
   - Co-financing of programmes (COFUND)

IV. MSCA IF

I. Some Data Participation
I. MSCA Support in Spain
I. Horizon 2020 and MSCA

- Excellent Science
  - European Research Council (ERC)
  - Future and Emerging Technologies (FET)
  - Marie Skłodowska–Curie Actions (MSCA)
  - Research Infrastructures

- Industrial Leadership
  - Leadership in Enabling and Industrial Technologies (LEIT) – ICT, KETs, Space
  - Access to Risk Finance
  - Innovation in SMEs

- Societal Challenges
  - Health and Wellbeing
  - Food security
  - Transport
  - Energy
  - Climate action
  - Societies
  - Security

Widening Participation; Science with and for Society

- European Institute of Innovation and Technology (EIT)
- EURATOM
- Joint Research Centre (JRC)
I. The European Office of MICIU/FECYT

Objective
- Promote the participation and leadership of the Spanish R&I system in H2020.

Areas
- EXCELLENT SCIENCE: ERC, MSCA, FET
- SWAFS
- Challenge 6
- COST

Target group
- OPIs, Universities, public R&I centres
I. Spanish MSCA Support:

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Informative and training sessions

Managers Trained

MSCA Support

Queries solving

Pre-screening of proposals
II. General aspects MSCA
II. MSCA Basics

Training for researchers at all stages

- Excellent Science Pillar – Horizon 2020 (6.1M€)
- Funding based on **Unit Costs**
- **Bottom-up** approach

- Some key concepts:
  - **Triple “i” Mobility**
  - **Strong industry participation**
  - Adquisition of **new and complementary skills**
  - Emphasis on communication and **public engagement activities**
  - **Excellent working conditions**, gender balance and open recruitment
II. MSCA: focus on researchers’ career development

7 principles for Innovative Doctoral Training

- International networking
- Interdisciplinary research options
- Research Excellence
- Attractive institutional environment
- Quality assurance
- Exposure to non-academic sectors
- Transferable skills training

Research Development Framework RDF (ej: VITAE)

II. MSCA: excellent working conditions

The European **Charter for Researchers** is a set of general principles and requirements which specifies the roles, responsibilities and entitlements of researchers as well as of employers and/or funders of researchers.

The **Code of Conduct** for the recruitment of researchers consists of a set of general principles and requirements that should be followed by employers and/or funders when appointing or recruiting researchers.

*Open, Transparent and Merit-based Recruitment of Researchers*
II. MSCA Key concepts

- **I am a researcher: What counts?**
  - Research experience
  - Mobility rule
  - Nationality (some IF modes)

- **My institution: how can we participate?**
  - Beneficiary
  - Partner Organisation

- **Who can participate?**
  - Sectors: academic and non-academic
  - International participation minimums (for consortia)
II. MSCA and Eligible researchers

**RESEARCH EXPERIENCE** *

- **Early Stage Researcher (ESR):** No Doctoral degree and less than 4 years of research experience (FTE). Will be financed in ITN and COFUND-DP.
- **Experienced Researcher (ER):** Doctoral degree or 4 years of research experience. Will be financed in IF and COFUND-FP.

**MOBILITY RULE**

- **International movement**
  - Criteria to be fulfilled: recruitment (ITN) / call (IF).
  - No mobility rule in RISE.

**NATIONALITY**

- **Open to all nationalities**
- **Restrictions in IF**

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* **Full time equivalent research** is measured from the date when the researcher obtained the degree entitling him / her to embark on a doctorate (either in the country in which the degree was obtained or in the country in which the researcher is recruited or seconded) – even if a doctorate was never started or envisaged.
II. How can an institution participate

**BENEFICIARIES**
- Signs the Agreement with the European Commission
- Receives funds directly from the European Commission
- Recruits and train researchers

**PARTNER ORGANISATIONS (P.O.)**
- Host researchers during secondments
- Contribute to training activities
- No contractual link with European Commission, no EC funds (via Beneficiary)
- RISE Action: Third Countries are Partner Organisations
II. Two different Sectors

**ACADEMIC SECTOR**
- public or private High Education Institutions (HEI) awarding academic degrees
- public or private non-profit research organisations whose principal mission is research
- International European interest organisations (IEIOs)

**NON –ACADEMIC SECTOR**
Any other socio-economic actor not included in the academic sector definition (i.e: SMEs, enterprises, NGOs, hospitals, government bodies, museums...)
II. Country participation

Eligible to participate as Beneficiaries and Partner Organisations

* Iceland, Norway, Albania, Bosnia and Herzegovina, Former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia (as of November 2016)

### 27 Member States (MS) + ultraperiferic territories

### 16 Associated Countries to H2020 (AC) *

### Third Countries: Not MS / Not AC

**A.** Eligible to receive funding: established in Annex A WP

**B.** Countries not eligible for EU funding

Participation varies depending on MSCA Modes
II. UK Participation

- **“No deal” BREXIT:** UK participants will by April 12th “Third Country Participants” and may not receive EU Funding or participate as coordinators or beneficiaries.

- **BREXIT with deal:** Temporary deal for H2020 lifetime, no change until 31/12/2020, Associated Country (guarantee from the UK Gov.)

- **No BREXIT** – no problem!

Check the eligibility of your ITN / RISE project

Useful links


- [https://www.ukro.ac.uk/](https://www.ukro.ac.uk/)
II. 2018-2020 MSCA Calls: 2.871M€ / 6.162M€ H2020

Marie Skłodowska-Curie Actions

**ITN**  
Innovative Training Networks  
What does it offer?  
High-quality research training delivered through interdisciplinary networks, industrial doctorates or joint doctorates.  
Who applies?  
International networks of research organisations from the academic and non-academic sectors  
Who is funded?  
Researchers at doctoral level (less than 4 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 possible sectors to acquire new skills.  
Who applies?  
Individual researchers together with the host organisations  
Who is funded?  
Postdoctoral researchers

**RISE**  
Research & Innovation Staff Exchange  
What does it offer?  
The exchanges 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 & International Programmes  
What does it offer?  
Regional national or international programmes to foster excellence in training mobility and career development of researchers  
Who applies?  
Organisations funding or managing doctoral or fellowships programmes  
Who is funded?  
Researchers at doctoral and postdoctoral level
## II. Calls MSCA 2018/2020: 2.871,88M€

<table>
<thead>
<tr>
<th>Call ID</th>
<th>Call Opens</th>
<th>Call Deadline</th>
<th>Budget (Mio EUR)</th>
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<tr>
<td>H2020-MSCA-ITN-2018</td>
<td>12-10-2017</td>
<td>17-01-2018</td>
<td>442.00</td>
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<tr>
<td>H2020-MSCA-ITN-2020</td>
<td>12-10-2019</td>
<td>09-01-2020</td>
<td>525.00</td>
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<tr>
<td>H2020-MSCA-IF-2018</td>
<td>12-04-2018</td>
<td>12-09-2018</td>
<td>273.00</td>
</tr>
<tr>
<td>H2020-MSCA-IF-2020</td>
<td>08-04-2020</td>
<td>09-11-2020</td>
<td>325.00</td>
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<tr>
<td>H2020-MSCA-RISE-2018</td>
<td>22-11-2018</td>
<td>21-03-2018</td>
<td>80.00</td>
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<tr>
<td>H2020-MSCA-RISE-2019</td>
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<td>02-04-2019</td>
<td>80.00</td>
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<tr>
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<td>07-04-2020</td>
<td>80.00</td>
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<tr>
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<td>26-09-2019</td>
<td>90.00</td>
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<td>29-09-2020</td>
<td>100.00</td>
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<tr>
<td>H2020-MSCA-NIGHT-2018</td>
<td>07-11-2017</td>
<td>14-02-2018</td>
<td>12.00</td>
</tr>
<tr>
<td>H2020-MSCA-NIGHT-2020</td>
<td>08-10-2019</td>
<td>08-01-2020</td>
<td>08.00</td>
</tr>
</tbody>
</table>
II. MSCA financing: 100% Unit Costs

<table>
<thead>
<tr>
<th>MSCA</th>
<th>Researcher Unit Cost (person/month)</th>
<th>Institutional Unit Cost (person/month)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Living Allowance *</td>
<td>Mobility Allowance</td>
</tr>
<tr>
<td>ITN</td>
<td>3.270</td>
<td>600</td>
</tr>
<tr>
<td>IF</td>
<td>4.880</td>
<td>600</td>
</tr>
<tr>
<td>RISE</td>
<td>2.100</td>
<td>1.800</td>
</tr>
<tr>
<td>COFUND **</td>
<td>ESR</td>
<td>1.935</td>
</tr>
<tr>
<td></td>
<td>ER</td>
<td>2.740</td>
</tr>
</tbody>
</table>

* Country correction factor applies

** This figure represents the EU contribution
II. MSCA Calls: Innovative Training Networks

Innovative doctoral-level training providing a range of skills in order to maximise employability.

- **Consortium of organisations** from different countries and sectors
- **Joint** research training/doctoral programmes
- **Recruitment** of Early – Stage Researchers (ESR) to train them in research while and through carrying out their Individual Research Project
- Development of advanced **research skills** and **Transferable skills** training
- **Exposure** to non-academic sector
- **Networking** activities
- Duration of projects: maximum 4 years
- **Recruitment of researchers**: min. 3 months – max. 36 months

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**European Training Networks** (ETN)  
**European Joint Doctorates** (EJD)  
**European Industrial Doctorates** (EID)
III. MSCA – ITN 2019: ETN mode

- **Minimum 3 beneficiaries**: 3 countries (MS/AC)
- **No PhD award compulsory (although typical)**
- **Max. 540 Re/Mo for the network**: 15 ESR
- **Max. 40% of total budget to one country**
- Participation of **non-academic sector** considered essential
- **Joint supervision** encouraged
- **Secondments up to 30%** of the researcher recruitment period to a different beneficiary, partner organisation, entity with capital link to a beneficiary
- If doctoral training is offered, the entity entitled to award the PhD must be identified and added as P.O or entity with capital link
III. MSCA- ITN 2019: EJD mode (1)

- Minim. 3 academic beneficiaries: 3 MS/AC
- All entitled to award doctoral degrees
- Mandatory enrollment in doctoral programme
- Provision of joint, double or multiple degrees
- Max. 540 ESR/Mo (15 ESR)
- Max. 40% of total budget to one country
- Joint governance structure compulsory (joint selection, supervision...)
- Participation of non-academic sector encouraged
- Letters of institutional commitment of beneficiaries

- At least 2 of the entities awarding PhDs based in MS /AC
- Applicants must indicate from which institution (s) supported ESRs will receive the degree (s)
II. MSCA – ITN 2019: EID mode

Applying to both (2 and more benef.)

- PhD enrollment compulsory
- > 50% of time at non-academic sector: at beneficiaries or P.O.
- Any intersectoral mobility between beneficiaries must be international. The total secondment duration to P.O (irrespective of the sector) is limited to a max. of 30% of the fellowship duration.
- Joint governance structure compulsory (joint selection, supervision, monitoring and assessing)
- For academic institutions not offering doctoral degrees, Universities should be included as P.O or entities with legal link

2 beneficiaries
- 1 academic, 1 non-academic
- 2 countries (MS/AC)
- P.O any country, any sector
- Max. 180 ESR/Mo (5 ESR)

> 2 beneficiaries
- 1 academic, 1 non-academic
- 2 countries (MS/AC), add. beneficiaries and P.O. any sector, any country
- Max. 540 ESR/Mo (15 ESR)
- Max. 40% total budget to one country
II. ITN 2019: To sum up -😊

<table>
<thead>
<tr>
<th>BENEFICIARY (IES)</th>
<th>ETN</th>
<th>EID</th>
<th>EJD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Minimum Number of beneficiaries</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Minimum MS or AC</td>
<td>3</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Academic sector</td>
<td>No restrictions</td>
<td>Minimum 1</td>
<td>Minimum 3 entitled to award doctoral degrees</td>
</tr>
<tr>
<td>Non-academic sector</td>
<td>No restrictions</td>
<td>Minimum 1</td>
<td>No restrictions</td>
</tr>
<tr>
<td>Max no. of person months</td>
<td>540</td>
<td>180</td>
<td>540</td>
</tr>
<tr>
<td>Max 40.0% budget for 1 country</td>
<td>Mandatory</td>
<td>N/A</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Beneficiary (or partner organisation) awarding PhD</td>
<td>Optional</td>
<td>Mandatory (1 beneficiary or partner organisation)</td>
<td>Mandatory for minimum 3 beneficiaries</td>
</tr>
<tr>
<td>Joint award of PhD</td>
<td>Optional</td>
<td>Optional</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Joint degree – letter of institutional commitment</td>
<td>N/A</td>
<td>N/A</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Joint supervision for ESRs</td>
<td>Encouraged</td>
<td>Mandatory (from the 2 sectors)</td>
<td>Mandatory</td>
</tr>
<tr>
<td>ESRs enrolment in the PhD</td>
<td>Optional</td>
<td>Mandatory</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Inter-sectoral mobility must be international</td>
<td>Optional</td>
<td>Mandatory</td>
<td>Optional</td>
</tr>
<tr>
<td>Secondments: international, inter-sectoral, interdisciplinary</td>
<td>≤ 30%</td>
<td>Min 50% stay in the non-academic sector, ≤ 30% in partner organisations</td>
<td>≤ 30%</td>
</tr>
</tbody>
</table>

- 6 – 10 benef.
- 2 – 3 beneficiaries
- 4 – 8 benef.
II. MSCA calls: Research & Innovation Staff Exchange (RISE)

**MAIN CHARACTERISTICS:**
- Project based in R&D and innovation activities
- High impact expected, transfer of knowledge and technology
- **No mobility rule applies**
- Any country can participate in RISE (not all are eligible for funding)
- **Duration of the project:** 48 months. Max: 540 researchers-month
- Funding for secondments (2100€ Researcher UC + 2500€ Institutional UC)

**STAFF:** Must be **active** at their host in research and innovation activities for 1 month before secondment (ER, ESR, ADM, MAN, TECH)
- Must be **reintegrated** after secondments (no duration or mechanism specified)
- During the Secondment period, STAFF must be devoted 100% to RISE

**SECONDMENTS:**
- Min: 1 month – max: 12 months
- **Split-stays possible:** i.e. an ESR travels for 2 weeks in M6 and 2 weeks in M16 to the same organisation = 1 month during the project
II. MSCA calls: Research and Innovation Staff Exchange (RISE)

3 participants in 3 countries:

1. **All MS/AC**: 3 beneficiaries in 3 MS / AC, at least 1 academic and 1 non-academic
2. **Including TC**: 2 beneficiaries in 2 MS / AC y 1 P.O in a TC, independent from the sector they belong to

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**Intra-European Exchanges**

- Secondments in the same country
- Secondments within the same sector in Europe
- Secondments between different sectors: academic and non-academic

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**Europe-Third Countries Exchanges**

- Secondments of MS/AC to TC
- Secondments of TC (High Income) to Europe (no funding)

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*Secondments from a TC to a MS/AC are not always eligible for EU funding but all of them must be described in the proposal.*
II. MSCA calls: COFUND

Aims at stimulating regional, national or international programmes to foster excellence in researchers' training, mobility and career development

- Mono-beneficiaries: legal entities established in MS or AC or international European interest organisations that manage or fund doctoral programmes or fellowship programmes for researchers.
- Duration of projects: between 3 and 5 years
- EU Unit Cost contribution to living allowances for researchers and management costs
- Sinergies with other funds (structural funds - RIS3)
- Recruitment: Min. 3 months
- Funding: EU contribution includes institutional costs (325€/PM) + Researcher’s costs (1935€/PM for ESRs and 2740 €/PM for ER); the institutions must cofund researcher’s unit cost (774€/PM for ESRs or 1096€/PM for ER as a minimum).
II. MSCA calls: Individual fellowships (IF)

Enhance the **creative and innovative potential** of experienced researchers by providing them with opportunities to acquire new knowledge, work on research projects in a European context and outside Europe.

- Fully-funded monobeneficiary fellowships (salary + research and management costs),
- To incorporate experienced researchers in a period of mobility at all stages of their career path,

### EUROPEAN FELLOWSHIPS

**MS/AC**
- For fellows coming to or moving within European countries.
- If moving to a Widening country there will be a second chance to be funded.

### GLOBAL FELLOWSHIPS

**TC**
- For fellows from Europe* going to a third country.
- Transfer of knowledge, through a Return Phase to Europe is mandatory.
III. MSCA IF
III. MSCA IF: What are they?

Objective:
Enhance the **creative and innovative potential** of experienced researchers by providing them with opportunities to acquire new knowledge, work on research projects in a European context and outside Europe.

- **Fully-funded monobeneficiary fellowships** (salary + research and management costs),

- For research-focused organizations, from academic and non-academic sector,

- To incorporate **experienced researchers** in a **period of mobility** at all stages of their career path,

- To provide them with **career development opportunities through training and a research project** in any scientific area (**bottom-up approach**).
III. IF ACTORS

HOST INSTITUTION → BENEFICIARY

- Recruits, Hosts, and trains the fellow,
- Must be located in a Member State (MS) or Associated Country (AC).
- Receives funding from EC.
- Signs the Grant Agreement with the EC.

<table>
<thead>
<tr>
<th>Academic host</th>
<th>Non-academic host</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Public or private Higher Education Institutions awarding academic degrees.</td>
<td>Any other socio-economic actor not included in the academic sector definition (SME, enterprises, NGOs, hospitals, government obides, museums, libraries...).</td>
</tr>
<tr>
<td>• Public or private non-profit research organizations.</td>
<td></td>
</tr>
<tr>
<td>• International European Interest Organisations.</td>
<td></td>
</tr>
</tbody>
</table>

PARTNER ORGANISATION

- Does not recruit the fellow, offers **additional training** and hosts the researcher during his / her:

<table>
<thead>
<tr>
<th>Secondment</th>
<th>GF outgoing phase</th>
</tr>
</thead>
<tbody>
<tr>
<td>Located in MS or AC</td>
<td>Located in a TC</td>
</tr>
<tr>
<td></td>
<td>Letter of commitment</td>
</tr>
</tbody>
</table>
III. IF ACTORS

**SUPERVISOR**
- The scientist appointed at the beneficiary to supervise the researchers throughout the whole duration of the action.
- For GF a co-supervisor must be appointed at the partner organization.
- A supervisor can supervise several fellows.

**FELLOW**
- The researcher appointed by the beneficiary to implement the research project described in the application.
- A candidate can only submit one proposal.
III. How to look for a host institution?

https://www.net4mobility.eu/

**MSCA Expression of Interest (EOI)**

Are you looking for a partner institution for your MSCA project, or a host institution for your fellowship or fellowship positions, check out the links below. If you are an institution wishing to publish your MSCA job offers, please contact net4mobility@euresearch.ch

The EURAXESS Website and Participant Portal also provide some Expressions of Interest in Hosting Candidates! Do not hesitate to promote your EOI also there.

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By Country  
By MSC Actions  
By Panel
III. Am I eligible?

Candidates must, by the call deadline:

Be experienced researchers:
- having a doctoral degree.
- at least 4 years of full-time equivalent research experience.

Comply with the mobility rule:
- Candidates must not have lived and/or worked in the country of the host institution for a certain period of time.
- For GF this rule applies at the country of the partner organisation.

Nationality restrictions apply in some cases:
- RI: nationals or long term residents in MS or AC.
- GF: nationals or long term residents in MS or AC.
III. How do I choose my MSCA-IF modality?

WHERE?

**EUROPEAN FELLOWSHIPS**

- **MS/AC**
  - For fellows coming to or moving within European countries.
  - If moving to a Widening country there will be a second chance to be funded.

**GLOBAL FELLOWSHIPS**

- **TC**
  - For fellows from Europe* going to a third country.
  - Transfer of knowledge, through a Return Phase to Europe is mandatory.
III. MSCA-IF GLOBAL FELLOWSHIPS

Outgoing phase to a TC

Mandatory Return phase

• For **fellows from Europe*** going to a third country (TC):
  *The researcher must be national or long-term resident (5 years continuous legal residence) of a MS or AC.

• Comply with the **mobility rule at the TC**:
  *The researcher must not have lived or worked in this TC for more than **12 months in the last 36**.

• An **up-to-date letter of commitment** from the partner organisation is **needed**.

• Outgoing phase of 12-24 months.

• **Mandatory phase of 12 months in Europe**:
  *The fellowship can start with a justified maximum-3-months-stay at a European institution (the beneficiary or a partner organization).
III. MSCA-IF EUROPEAN FELLOWSHIPS

For fellows coming or moving within Europe.

How do I choose my panel?

- Compliance with specific requirements.
- Available budget:
- Success rate:

<table>
<thead>
<tr>
<th>Panel</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SE</td>
<td>Highest success within IF rate due to novelty and difficulty to find a non-academic host.</td>
</tr>
<tr>
<td>CAR</td>
<td>Double weight during budget distribution.</td>
</tr>
<tr>
<td>RI</td>
<td>One and half weight during budget distribution.</td>
</tr>
<tr>
<td>ST</td>
<td>One weight during budget distribution.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Panel</th>
<th>Budget</th>
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<tbody>
<tr>
<td>SE</td>
<td>8M€</td>
</tr>
<tr>
<td>CAR</td>
<td>Shared Budget of 220M€</td>
</tr>
<tr>
<td>RI</td>
<td></td>
</tr>
<tr>
<td>ST</td>
<td></td>
</tr>
</tbody>
</table>
III. MSCA-IF EF-SE

For fellows coming or moving within Europe.

- Host institution from the non-academic sector.
- Relaxed Mobility Rule: no more than 3 years in the 5 years.
- No restriction to nationality applies.
- Multidisciplinary panel.
- Duration of the project between 12 and 24 months.
For researchers who want to resume research in Europe after a career break.

- Career break:
  * the researcher must not have been active for a continuous period of 12 months within the last 18 months.

- Relaxed Mobility Rule: no more than 3 years in the 5 years.

- No restriction to nationality applies.

- Multidisciplinary panel.

- Duration of the project between 12 and 36 months.
For European* researchers who want to return from a TC and reintegrate in Europe.

• Direct mobility from a TC.

• Relaxed Mobility Rule: no more than 3 years in the 5 years.

• Restriction to nationality:
  *Nationals or long-term residents of a MS or AC.*

• Multidisciplinary panel.

• Duration of the project between 12 and 24 months.
III. MSCA-IF EF-ST

For *fellows coming or moving within Europe*.

- Mobility Rule: no more than 12 months in the last 36.
- No restriction to nationality applies.
- 8 scientific panels:
  - CHE Chemistry
  - SOC Social Sciences and Humanities
  - ECO Economic Sciences
  - ENG Information Science and Engineering
  - ENV Environmental and Geosciences
  - LIF Life Sciences
  - MAT Mathematics
  - PHY Physics
- Duration of the project between 12 and 24 months.
III. WIDENING FELLOWSHIPS (WF)

For fellows coming or moving to a Widening country.

- MSCA IF-EF applications to a widening country not awarded will have the chance to be funded through SWAFS programme:
  * At submission stage applicants are asked in section 5 (Part A – Call Specific Questions) whether or not they wish to be considered for this funding opportunity
- No restriction to nationality applies.
- Normal award criteria, scoring and thresholds for MSCA – IF will apply.
- Single ranking list.
- Duration of the project between 12 and 24 months.

27 Widening Countries in Horizon 2020☆

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.
III. Must haves

• **Individual career development project through training and research under thorough supervision of a more experienced researcher.**

• **Achievable results along the project with full-time dedication:**
  * Part-time dedication (minimum 50%) could be applied for during the implementation of the project

• **Hands on training:**
  ✓ for developing scientific skills (new techniques, instruments, etc.)
  ✓ For developing and acquiring transferable skills:
    ❖ Proposal preparation to request funding
    ❖ Patent applications, management of IPR, take up and exploitation of results, entrepreneurship...
    ❖ Action management, task coordination, how to properly communicate
    ❖ Gender issues, research integrity, Open Science, etc.

• Organization and participation of scientific / training / dissemination events.

• **Communication, outreach activities, public engagement.**

• Intersectoral or interdisciplinary **transfer of knowledge (secondments...)**
III. Secondments

- Have to take place in a Partner Organisation in a MS / AC.
- **Meaningful** and **appropriate** to the type of fellowship and research field.
- Importance of the involvement of the non-academic sector.
- Partner Organisations for secondments: no need to include a letter of commitment.
- Clearly justified in Part B.

<table>
<thead>
<tr>
<th>IF Duration</th>
<th>Duration max. secondment</th>
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<tbody>
<tr>
<td>≤ 18 months</td>
<td>3 months</td>
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<tr>
<td>&gt; 18 months</td>
<td>6 months</td>
</tr>
</tbody>
</table>
III. Procedure

**European Fellowships**

Researcher applies with European host → Host signs contract with EC → Host employs researcher

**Global Fellowships**

Researcher applies with European host → European host signs contract with EC → European Host employs researcher

Supported by non-European host → Non-European host signs agreement with European host → Researcher seconded to non-European host
III. Timing

**H2020-MSCA-IF-2019 Call** (294.49M€)

- Call open for 5 months
- 5 months for evaluation
- 3 months for signature

- From May on the reserve list will be contacted.

- Fellows will need to be incorporated at host institutions during the following 18 months (September 2021).
## Financing

<table>
<thead>
<tr>
<th>MSCA</th>
<th>Researcher Unit Cost (person/month)</th>
<th>Institutional Unit Cost (person/month)</th>
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<tr>
<td></td>
<td>Living Allowance *</td>
<td>Mobility Allowance</td>
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<td></td>
<td>Family Allowance</td>
<td>Research, training and networking</td>
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<tr>
<td></td>
<td>IF</td>
<td>Management and overheads</td>
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<td>800</td>
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<td>650</td>
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</table>

### RESEARCHER UNIT COST

**Living Allowance:**
- Country correction factor (CCC) applies (host country): 95,4% for SP.
- Gross EU contribution living allowance: 58.560€/year before taxes*!
  * Cuota patronal, taxes, S.S...
- **Family Allowance:** determined at the submission deadline.

### INSTITUCIONAL UNIT COST

**Research, training and networking costs:**
- Purchase of material, organisation and travel to events, payment of conferences fees, etc.

**Management and overheads:**
- Indirect costs for institutions

- Budget pre-calculated by EC, base on unit costs
- **100% financing**
III. MSCA IF: Financing

A Global fellowship

<table>
<thead>
<tr>
<th>Participant Number</th>
<th>Organisation Short Name</th>
<th>Country</th>
<th>Country Coefficient</th>
<th>Number of Person Months</th>
<th>Researcher Unit Cost</th>
<th>Institutional Unit Cost</th>
<th>TOTAL</th>
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<tr>
<td>1</td>
<td>CNRS</td>
<td>FR</td>
<td>1,11</td>
<td>12</td>
<td>61 938</td>
<td>7 200</td>
<td>9 600</td>
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<tr>
<td>2</td>
<td>NYU SOM</td>
<td>US</td>
<td>0,994</td>
<td>13</td>
<td>60 087</td>
<td>7 800</td>
<td>10 400</td>
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<tr>
<td>Total</td>
<td></td>
<td></td>
<td></td>
<td>25</td>
<td>122 025</td>
<td>15 000</td>
<td>20 000</td>
</tr>
</tbody>
</table>
Some take-home messages

- **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
  - Buscar planjillas comentadas

- **“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:**
  - Colleagues
  - Own institution: European Projects Offices / Transfer of Technology Offices / HR Departments …
  - National Contact Points

- **Do not leave it for the last minute!**
  - Get familiar with the Participants’ Portal
  - Upload a version, you will be able to rewrite it.

---

**IF 2018 pre-screening:**
- July, 13th 2018
- Host Institution in Spain
- Via European Offices / Supervisors
III. MSCA IF: Eligibility criteria for researchers

<table>
<thead>
<tr>
<th>European Fellowships</th>
<th>Standard Fellowship</th>
<th>Career Restart Panel</th>
<th>Society and Entreprise Panel</th>
<th>Reintegration Panel</th>
<th>Global Fellowships</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What it is about?</strong></td>
<td>Mobility within countries</td>
<td>Inactivity in research last 12 months</td>
<td>Non-academic sector beneficiaries</td>
<td>Coming from TC to reintegrate in EU/AC</td>
<td>Period in a TC to learn and bring back knowledge</td>
</tr>
<tr>
<td><strong>Nationality:</strong></td>
<td>ANY</td>
<td>ANY</td>
<td>ANY</td>
<td>MS/AC national or long-term residents (*)</td>
<td>MS/AC national or long-term residents (*)</td>
</tr>
<tr>
<td><strong>From / to</strong></td>
<td>Anywhere in the world to MS/AC</td>
<td>Anywhere in the world to MS/AC</td>
<td>Anywhere in the world to MS/AC</td>
<td>Third Country to MS/AC</td>
<td>Anywhere in the world to TC (outgoing phase)</td>
</tr>
<tr>
<td><strong>Mobility Rule</strong></td>
<td>12 months / 3 years</td>
<td>36 months / 5 years</td>
<td>36 months / 5 years</td>
<td>36 months / 5 years</td>
<td>12 months / 3 years in TC.</td>
</tr>
</tbody>
</table>

* Or if at any time in the past the researcher has spent at least 5 years of consecutive research in one or more Member State or Associated Country to H2020
IV. Evaluation Aspects
III. ITN 2019: proposals’ first glance

| Title and Acronym | • Self-explanatory  
|                   | • Memorable       |

| Abstract (Part A) | • Be concise  
| Help matching with evaluators, and evaluators accept a proposal | • Provide enough technical/research information to help REA officers and evaluators understand the scope of your proposal  
| | • Reflect the whole proposal including:  
| | • Overall research theme  
| | • Research objectives  
| | • Training objectives  
| | • Potential Impact, including career paths for the ESRs |

| Panel | matching with a set of evaluators |
|       | ![Panel Matching](chart) |

| Descriptors | will help matching with evaluators |
|             | Can add up to five (minimum three) descriptors in order of importance:  
|             | • The 1st and 2nd descriptors must be chosen from the list provided for the scientific panel you have chosen.  
|             | • The 3rd (4th and 5th) descriptor(s) can be chosen from any of the eight scientific panels. |
III. MSCA ITN 2019: evaluation

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Weight</th>
<th>Priority (ex.aequo)</th>
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<tr>
<td>Excellence</td>
<td>50%</td>
<td>1</td>
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<tr>
<td>Impact</td>
<td>30%</td>
<td>2</td>
</tr>
<tr>
<td>Implementation</td>
<td>20%</td>
<td>3</td>
</tr>
</tbody>
</table>

- Each proposal is scored remotely by 3 different remote evaluators. Their review form has the same headings as the proposal template.

- Each evaluator gets approx. 8 proposals to assess in a short timeframe. Clarity and readability of the proposal, both from a content and a formatting point of view, is vital.

- Each remote evaluator scores the Excellence, Impact and Implementation criteria out of 5. A “Vice-Chair” acts as rapporteur, and puts together the comments of the remote evaluations, to deliver the draft Consensus/Evaluation Summary Report back to the remote evaluators for discussion.

- The strengths, weaknesses and scores in the draft Consensus Report are discussed and agreed by the 3 remote evaluators online, through a chat-like system called “SEP”. The starting score is often the average of the 4 scores for each criterion. The Vice –Chair makes sure the comments match the score, i.e. 3 is Good, 4 is Very Good, 5 is Excellent.

- Proposals scoring above 70% are discussed and ranked by a panel of Vice-Chairs in Brussels.
IV. Evaluation: Scoring the proposal

<table>
<thead>
<tr>
<th>Score</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>5</td>
<td>Excellent</td>
</tr>
<tr>
<td>4</td>
<td>Very Good</td>
</tr>
<tr>
<td>3</td>
<td>Good</td>
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<td>2</td>
<td>Fair</td>
</tr>
<tr>
<td>1</td>
<td>Poor</td>
</tr>
<tr>
<td>0</td>
<td>Fail</td>
</tr>
</tbody>
</table>

- **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
IV. MSCA ITN 2019: Evaluation Criteria

**Excellence (50%)**

1.1 Quality, innovative aspects and credibility of the research programme (including inter/multidisciplinary, intersectoral and gender aspects)
   - Introduction, objectives and overview of the research programme
   - Research methodology and approach
   - Originality and innovative aspects of the research programme

1.2 Quality and innovative aspects of the training programme (including transferable skills, inter-multidisciplinary, inter-sectoral and gender aspects)
   - Overview and content of the training (ETN) or doctoral programme (EID/EJD)
   - Role of the non-academic sector in the training programme

1.3 Quality of the supervision
   - Qualifications and supervision experience of the supervisors
   - Quality of the joint supervision arrangements

1.4 Quality of the proposed interaction between the participating organisations
   - Contribution of all participating organisations to the research and training programme
   - Synergies between participating organisations
   - Exposure of recruited researchers to different (research) environments, and the complementarity thereof

**Impact (30%)**

2.1 Enhancing the career perspectives and employability of researchers and contribution to their skills development

2.2 Contribution to structuring doctoral/early-stage research training at the EU level and to strengthening EU innovation capacity, including the potential for:
   a) Meaningful contribution of the non-academic sector to the doctoral/research training
   b) Developing sustainable joint doctoral degree structures (EJD)

2.3 Quality of the proposed measures to exploit and disseminate the results
   - Dissemination of research results
   - Exploitation of results and IP

2.4 Quality of the proposed measures to communicate the activities to the target audiences
   - Communication and public engagement strategy

**Implementation (20%)**

3.1 Coherence and effectiveness of the work plan
   - WP description
   - List of Major Deliverables
   - List of major milestones
   - Fellows’ individual projects
   - Gantt Chart

3.2 Appropriateness of the management structure and procedures, including quality and risk management
   - Network organisation and management structure
   - Joint governing structure
   - Joint admission, selection, supervision, monitoring and assessment procedures (EJD)
   - Supervisory Board
   - Recruitment Strategy
   - Progress monitoring and evaluation of individual projects
   - Risk management
   - IPR
   - Gender Aspects
   - Data Management Plan

3.3 Appropriateness of the infrastructure of the participating organisations

3.4 Competences, experience and complementarity of the participating organisations and their commitment to the programme
   - Consortium composition and exploitation of participating organisations’ complementarities
   - Commitment of beneficiaries and partner organisations of the programme
IV. To take into account: A good proposal

- **As a consortium:**
  - Capacity of the participants: clearly demonstrated
  - Evidence of Partner Organisations Commitment
  - Involvement of non-academic sector

- **As a coordinator:**
  - Start writing early the proposal and if possible, have a physical meeting
  - Discuss the allocation of Institutional Unit Cost beforehand
  - Plan a consortium agreement including IPR and research integrity issues, set a rule to solve conflict management

- **Help evaluators:**
  - “A picture is worth a thousand words”: use visuals to provide global information at a glance.
  - Be aware of all criteria weight, it is not all about Excellence!
  - Be precise – less is sometimes more; structure the proposal well (follow template)
IV. To take into account: Impact levels

**RESEARCHER LEVEL**
- Increased set of skills (research-related and transferable ones), leading to improved **employability** and career prospects both in and outside academia
- Increase in **higher impact R&I output** and more knowledge and ideas converted into products and services

**ORGANISATION LEVEL**
- Enhanced cooperation and better transfer of knowledge between **sectors and disciplines**
- Improvement in the **quality** of training programmes and supervision arrangements
- Increased **internationalisation** of participating organisations

**SYSTEM LEVEL**
- Increase in **international, interdisciplinary and intersectoral** mobility of researchers in Europe
- Increase in Europe’s attractiveness as a **leading research destination**, accompanied by a rise in the number of talented researchers attracted and retained from abroad
- More **structured and innovative doctoral training**, enhanced implementation of the **European Charter and Code** and the EU Principles for Innovative Doctoral Training
IV. Horizontal issues: RRI aspects

RRI focus on 6 policies:

1. Public engagement
2. Gender equality
3. Science education
4. Open access
5. Ethics
6. Governance

- Science with and for society, including all actors in the process and results
- Cross-cutting issue in Horizon 2020
IV. Horizontal issues: Gender Aspects

Gender now explicitly mentioned in the evaluation sub-criteria for research/training for all MSCA

In your proposal, you should describe:

- **Gendered Innovations**: any gender aspects in relation to the research e.g. cardiovascular research, crash-test dummies, ITC devices, voice recognition
- **Gender Training**: training in gender balance/gendered innovations for the ESRs
- **Gender balance**: equality in decision making, recruitment, supervisory arrangements

http://genderedinnovations.stanford.edu
http://ec.europa.eu/research/swafs/index.cfm?pg=policy&lib=gender
IV. Horizontal issues: Communicate your results!

**Outreach**

- Reaching a **big audience** (presentations at schools, seminars, visits to labs...). Looking for interactive activities.
- Inform the **general public of the benefits** / results of the research carried out (European Researchers’ Night, EU Open Days, MSCA Ambassadors...)

**Communication activities**

Articles in newspapers, journals, TV and radio programmes. Needs a clear language and an attractive scientific topic with results in order to attract the public interest.

Open Access – **Open Data** (Dissemination of results)

**Have a RRI (responsible research and innovation) approach in your project**
IV. Horizontal issues: Ethical Aspects

All proposals will undergo an ethics review

- Human Embryos / Foetuses
- Humans
- Human Cells / Tissues
- Protection of Personal Data
- Animals
- Third Countries
- Environmental Protection and safety
- Dual Use
- Misuse
- Other Ethics Issues

Participants have to:

- **Identify** all potential ethical aspects
- Explain their future **management**
- Give a detailed explanation at **proposal stage**

**Description on Ethics:**

- Ethic Issues Table en part A
- Ethics Self-Assessment en part B


Ethics Guidance
IV. To take into account: general tips

- **Read the Call Documents:**
  - Work Programme, Guide for Applicants, Horizontal Issues: Gender / Ethic Issues, etc, FAQ
  - Pay attention to the mandatory requirements of particular modes
  - [Web Eshorizonte2020 - Sección MSCA](#)

- **Ask for support:**
  - Colleagues
  - European Projects Offices / Transfer of Technology Offices / HR Dtps
  - National Contact Points

- **Do not leave it for the last minute!**
  - Get familiar with the Participants´ Portal
  - Upload a version, you will be able to rewrite it.

....and success doesn’t always come on the first attempt
V. Some data to show the competition in MSCA
V. Spanish Participation in MSCA

<table>
<thead>
<tr>
<th>Year</th>
<th>ITN</th>
<th>RISE</th>
<th>IF</th>
<th>COFUND</th>
<th>NIGHT</th>
<th>NCP</th>
<th>TOTAL</th>
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</tbody>
</table>

Funds ES MSCA 2014-2017 (M€): 275,68M€
V. Spanish Participation in MSCA

8.70% 10.10% 10.69% 10.95%
V. Some Data: Cut-off notes EF ST – CAR – RI - SE

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SE 2016 80.6  SE 2017 83.6
V. Some Data: Cut-off notes GF

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<tr>
<th>Year</th>
<th>Subject</th>
<th>Cut-off Notes</th>
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V. Some Data: IF 2017 – Funded proposals per action

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V. Some Data: IF 2017 – Funded proposals per action

IF-GF 2017: Funded proposals per action

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V. Some Data: IF 2017 – Funded proposals per country

IF-GF 2017: Funded proposal per country (return phase)

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**Percentage of proposals below threshold (<0)**

27.42% 14.17% 48.18% 16.90% 33.55% 24.42% 15.90% 19.43% 16.49% 17.95% 27.73% 18.74% 19.17% 12.64% 21.43% 16.30% 24.70%
¡Muchas gracias!

Cristina Gómez  
Cristina.gomez@oficinaeuropea.es  
Oficina Europea MICIUN/ FECYT

USEFUL INFORMATION
• EURAXESS Spain: http://www.euraxess.es/
• Oficina Europea FECYT/ MICIUN: http://eshorizonte2020.es