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POSTDOCTORAL FELLOWSHIPS HANDBOOK

CALL 2022

NETWORK OF THE MARIE SKŁODOWSKA-CURIE ACTIONS
NATIONAL CONTACT POINTS

Task 3.4   Handbooks
Issued by: Agency for Mobility and EU Programmes
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Disclaimer

This is an UNOFFICIAL document prepared by MSCA-NET, the EU-funded project of National Contact Points (NCP) for the Marie Skłodowska-Curie Actions (MSCA). This handbook is the continuation of the MSCA handbooks prepared within the Net4Mobility+ project, originally inspired by ''IF Survivors Guide'', prepared by Mr. Pierantonios Papazoglou, former MSCA NCP from Cyprus.

The information contained in this document is intended to assist and support, in an unofficial and practical way, anyone submitting a proposal to the MSCA Postdoctoral Fellowship Call with the deadline 14/09/2022. This document is not, by any means, a substitute of official documents published by the European Commission, which in all cases must be considered as binding. As such, this document is to be used in addition to the official call documents: _MSCA Work Programme 2021-2022_, _Guide for Applicants for Postdoctoral Fellowship 2022_, and official FAQs prepared by the Research Executive Agency (REA).

This document may not be considered in any way as deriving from and/or representing the views and policies of the European Commission and the REA. Likewise, it may not be considered in any way as a document deriving from and/or representing the views and policies of the entities which are beneficiaries of the MSCA-NET project.

Please note that this document is susceptible to data corruption, unauthorized amendment and interception by unauthorized third parties for which we accept no liability.

It is the responsibility of the applicant to remain aware of any updates and to use the latest version of the official call documents should these be published after the publication of this document.

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Acknowledgements

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How to use the handbook

This handbook should be used in conjunction with the **_MSCA Work Programe 2021 – 2022_**, **_Guide for Applicants_**, **_official FAQs_** and proposal templates downloaded from the call webpage on the **_Funding & Tender Opportunities Portal_**. Please note that the information in this handbook complements the information contained in the template for Part B of the proposal.

- ✓ Information from the original Part B template is written in black Times New Roman font.

- ✓ Additional suggestions & information for each section of the proposal (part B1 and B2) are written in blue bullets and Calibri font.
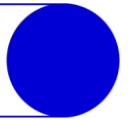
✓ Tables with the top 5 strengths and weaknesses of each sub criterion detail evaluators' comments from Evaluation Summary Reports.

MSCA Postdoctoral Fellowship essentials

Before you begin preparing your proposal, please ensure you are aware of the following facts and comply with the requested requirements:

MSCA PF DEADLINE	❖ **14th September 2022, 17:00 Brussels time** ❖ You can submit your application at any time before the deadline. Once submitted you can reopen, edit and resubmit your proposal as many times as required before the call deadline. Only the last submitted version of the proposal will be evaluated.
MOBILITY REQUIREMENTS	❖ Recruited researchers must comply with the following mobility rule: they must not have resided or carried out their main activity (work, studies, etc.) in the country of the beneficiary (for European Postdoctoral Fellowships), or the host organisation for the outgoing phase (for Global Postdoctoral Fellowships) for more than 12 months in the 36 months immediately before the call deadline. ❖ This year's mobility eligibility window is from **15th September 2019 until14th September 2022.**
RESEARCHER REQUIREMENTS	❖ The researcher must be in possession of a doctoral degree or have successfully defended their doctoral thesis before the call deadline. ❖ For European Fellowships, the researcher can be of any nationality. ❖ For Global Fellowships, the researcher must be a national or long-term resident of a European Member State (MS) or Associated Country (AC).
RESEARCH EXPERIENCE	❖ Maximum 8 years (full-time equivalent) from the date of award of the (first) doctoral degree. ❖ Time spent: • on maternity leave, • Parental leave, • compulsory national service, • not working in research; • only for the researchers who are reintegrating in Europe within European Fellowship - doing research in a non-associated TC (for MS /AC nationals and long-term residents applying for European Fellowship) and • long term sick leave can be deducted for the full-time research experience. ❖ More detailed information is available in the Guide for Applicants, **Guidelines on the calculation of 8years research experience in PF** and **PF Self-assessment tool for the calculation of the 8years research experience.**
RESUBMISSION	As of 2022, proposals involving the same beneficiary and individual researcher submitted to the previous call (2021) of **MSCA Postdoctoral Fellowships under Horizon Europe and having received a score of less than 70% must NOT be resubmitted the 2022 year.** Applicants who scored over 70%, will be allowed to re-submit a proposal as well as applicants that were rejected (didn't go through the evaluation process) under the previous year's Postdoctoral Fellowship call.

A proposal **involving the same recruiting organisation** (and for Global Postdoctoral Fellowships also the associated partner hosting the outgoing phase) and the **same individual researcher** is considered a resubmission**.**

This means, for example, that the researcher can (re)submit the proposal with a different host, so they are not totally banned from applying the following year, like for example in ERC.

If you are going to re-submit a proposal, you need to indicate re-submission in part A of the project proposal (see the picture below), including the previously submitted proposal reference number.

Application forms

Proposal ID SEP-210766618
Acronym   **TEST**

Has this proposal (or a very similar one) been submitted in the past 2 years in response to a call for proposals under any EU programme, including the current call? *   ◉ Yes   ○ No   **?**

| Please give the proposal reference or contract number. | **Add** |
| *Previously submitted proposals should be with either 6 or 9 digits.* | |

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Upon fulfilling requirements for the 2022 call, make sure you have done the preparations in relation to:

SUPERVISOR

❖ You must have a designated supervisor in a host organisation, and have made contact with him/her and secured agreement from them to be your supervisor in the project and to host you in the host organisation specified.
❖ The supervisor will also contribute actively to the preparation and submission of the proposal, and offer advice and guidance!

HOST ORGANISATION

❖ You have contacted the research office in your host organisation.
❖ The research office will support you with the proposal. Some host organisations require that their responsible office/unit/service for EU grants also checks the proposal. So check if there any internal requirements that the research office/host organisation requires.

REQUIRED DOCUMENTS

❖ You have read the required documents that contain the rules and conditions for the call, the template for project proposals as well frequently asked questions (FAQs)
  ✓ **Postdoctoral Fellowships Guide for Applicants 2022**
  ✓ **MSCA Work Programme 2021 – 2022**
  ✓ **Specific FAQs for Postdoctoral Fellowships call for proposals 2022**
  ✓ **MSCA-NET FAQs**
  ✓ **Proposal template and instructions on how to fill it in**

FAMILIARISE YOURSELF WITH THE SUBMISSION PROCESS	❖ It is recommended to discuss with your host organization or supervisor what is their preferred practice is in terms of submission of proposal. ❖ The proposal must be submitted on the Funding & Tender Opportunities Portal using the host organisations PIC number. ❖ You as an applicant can be listed as main contact in order to have access to the submission account. ❖ Proposal templates (Part B) can be downloaded once submission has been started and a proposal profile is created on the Funding & Tender Opportunities Portal.
UNDERSTAND WHAT IS REQUIRED FOR THE SUBMISSION	❖ **Administrative forms (Part A)** Part A constitutes an integral part of your proposal; it is the part of the proposal where you will be asked for certain administrative details that will be used in the evaluation and further processing of your proposal. For more information please refer to **Standard application form (HE MSCA PF)** (pages from 1 to 24). ❖ Narrative part B is composed of two separate PDF files (Part B1 and Part B2), which must be uploaded as separate PDF files: ❖ **Part B1,** containing a maximum of 10 (ten) A4-sized pages. • Any excess pages (i.e. numerical page 11 and beyond) will not be available to the evaluators. • Part B1 is the core part of the proposal; it should contain the details of proposed research according to the three evaluation criterions: • Section 1. Excellence • Section 2. Impact • Section 3. Implementation ❖ **Part B2**, with no strict page limit for A4-sized pages containing: • Section 4. CV of the experienced researcher (5 pages) • Section 5. Capacities of the participating organisations (1 page for the overview and 1 page for each participating organisation) • Section 6. Additional ethics information • Section 7. Additional information on security screening • Section 8. Letters of commitment of the partner organisation (GF and non-academic placement only). **All sections of the proposal will be included in the evaluation.** The 10-page limit is applied only to part B1 - sections 1 to 3. Applicants will **NOT** be able to submit their proposal in the submission system unless both parts 1 and 2 are provided in PDF format (Adobe version 3 or higher, with embedded fonts).
NCP SUPPORT	❖ You have contacted your relevant MSCA National Contact Point. ❖ This should be the NCP in the country in which the beneficiary is located. Please retrieve the contact details of your NCP here: **https://msca-net.eu/contact-points/**

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Key tips for proposal template and layout

The following information is important to familiarise yourself with as it will make the review process for the evaluator easier.

1. General points

✓ **Acronym:** Use a self-explanatory title and a memorable acronym. Don't forget that you will not be able to change the acronym once you submit your proposal on the Funding and Tenders Portal.

✓ The acronym will be on your proposal and you will refer to it throughout your communication and dissemination activities Ensure that the acronym is short, easy to pronounce, easy to remember by the evaluators, and that it cannot be construed as inappropriate or having a ''double meaning'' in English or in another language.

✓ Useful tool for creating an acronym: http://acronymcreator.net/

✓ The proposal acronym could be placed in a header on each page as an addition to already placed information: Call: insert call identifier] — [insert call name].

✓ There is no cover page for the acronym & title.

✓ **For resubmissions,** don't just use Evaluation Summary Report (ESR) from the previous submission. Review the proposal as a whole to find room for improvement. Your new proposal is not being evaluated in comparison with last year's.

✓ Part B might change slightly from one year to another (e.g.,subheadings). So make sure you are using the template of the 2022 MSCA PF-call.

✓ Evaluators will have access to last year's ESR after they have marked this year's application.

✓ Make sure that the state-of-the art is updated.

✓ Be aware of the overall weighting of each criterion. You need to score well in all sections in order to be funded.

2. Proposal layout

✓ The page size is **A4, and all margins (top, bottom, left, right) should be at least 15 mm** (not including any footers or headers).

✓ The reference font for the body text of proposals is **Times New Roman (Windows platforms), Times/Times New Roman (Apple platforms) or Nimbus Roman No. 9 L (Linux distributions).**

   ✓ The use of a different font for the body text is not advised and is subject to the cumulative conditions that the font is legible and that its use does not significantly shorten the representation of the proposal in number of pages compared to using the reference font (for example with a view to bypassing the page limit).

✓ **The minimum font size allowed is 11 points.** Standard character spacing and a minimum of single line spacing is to be used.

✓ Use charts, diagrams, text boxes, figures to explain aspects of the project. Do not just use blocks of text. Don't forget to add serial numbers and titles to the charts/ diagram/ figures/ text boxes.

   ✓ If needed, use tables for illustrating the core text of the proposal. These break up the text and also save space (font size 8). Be aware that tables cannot be used to contain the core text itself (i.e., if you insert long chunks of text in tables for the sole purpose of saving space, REA might contact you after the deadline and ask you to transfer your information from the table into the core text)

✓ Ensure any colour diagrams etc. are understandable when printed (also in black and white).

✓ Note that text elements such as tables, headers, foot/end notes, captions, formulas, etc. may deviate, but must be legible and not be less than 8 points.

✓ Use highlighting where appropriate (bold, underline, italics) but don't overdo it!

✓ Literature references in footnotes, font size 8 or 9.

✓ Avoid hyperlinks to information that is designed to expand the proposal. Evaluators will be instructed to ignore, place the relevant information into your text.

3. Proposal template

✓ Use the proposal template provided, including the exact sub-headings, because:

   ✓ It matches the evaluation template and helps you to put the right information in the right place for the evaluators to find it.

   ✓ Evaluators use a "checklist" approach to marking – if the information is not in the correct section, they will give you "zero" for that sub-criterion.

✓ Put page numbers (format Part B - Page X of Y) in the footer.

✓ There is no cover page or table of content.

4. Page limitations

✓ Part B1. Sections 1, 2 and 3 together **should not be longer than 10 pages.**

✓ All tables, figures, references and any other element pertaining to these sections must be included as an integral part of these sections and they are counted towards this page limit.

✓ The page limit for this part of the proposal will be applied automatically.

✓ If you attempt to upload a proposal longer than the specified page limit before the deadline, you will receive an automatic warning and will be advised to shorten and re-upload the proposal.

✓ After the deadline, excess pages (in over-long proposals) will be automatically made invisible, and therefore will not be taken into consideration by the experts

5. Proposal language

✓ Avoid jargon.

    ○ The majority of evaluators will not be expert in the specific subject area so write in a style that is accessible to the non-expert using figures/tables/charts/diagrams to illustrate where appropriate.

✓ Explain any abbreviations the first time you use them.

✓ Use simple clear text, make sure that it 'reads well'.

✓ Avoid long sentences. Avoid too much repetition. Sign-post or put reference to other parts of the proposal if necessary.

✓ Do not copy & paste information from other documents/websites. Instead, tailor information to fit with your proposal. Try to make it relevant to your proposed fellowship.

✓ Be consistent with terms used (for example, you can talk in 1st person (1, me), 3rd person (the researcher, the ER, the fellow), use the same term throughout.

Common mistakes in PF proposal submission

After the first MSCA PF call in the Horizon Europe programme, the Research Executive Agency (REA) provided information on the most common mistakes in the PF proposal submission:

- Wrong type of action was encoded: Global Fellowship instead of European Fellowship or vice versa.

- Associated partner for an outgoing phase of a Global Fellowship not located in a third country (TC), but in an associated country.

- Wrong applicant organisation declared: outgoing phase host or affiliation of researcher at time of application (different from the real future host organisation).

- Researcher and supervisor should NOT be the same person.

- Missing abstract, panel and keywords.

- Wrongly encoded non-academic placements: 50% of the encoded non-academic placement (NAP) in PF-2021 were secondments/short visits and not non-academic placements.

- Wrongly encoded outgoing/return phase institutions.

- Several applications submitted with warnings not addressed.

- Most of the inconsistencies identified related to participating organizations, proposal duration, and budget.
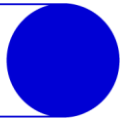
- Identified common mistakes in the budget part of the proposal:
  - Wrongly encoded nations (TC instead of MS/HE AC for host beneficiary, NAPs in TC)
  - Wrong duration of different phases (EF duration, GF outgoing phase, GF return phase, NAP)
  - Wrong budgets (directly related to wrong durations)
  - Wrong country correction coefficient (directly related to wrong nation encoding)
  - Secondments/short visits added as associated partners in Part A

How to address and avoid these common mistakes in this PF call? You can consult extensive presentations, including all the steps on how to encode non-academic placement/Global Fellowship, etc.: **Common mistakes in MSCA-PF proposal submission**.

Definitions and key aspects

DEFINITIONS and KEY ASPECTS	
Artificial Intelligence[1]	Artificial intelligence (AI) refers to systems that display intelligent behaviour by analysing their environment and taking actions – with some degree of autonomy – to achieve specific goals.
	AI-based systems can be purely software-based, acting in the virtual world (e.g., voice assistants, image analysis software, search engines, speech and face recognition systems) or AI can be embedded in hardware devices (e.g. advanced robots, autonomous cars, drones or Internet of Things applications)
	If you plan to make use of Artificial Intelligence in your project, the evaluators will evaluate the technical robustness of the proposed system under the appropriate criterion – (methodology aspect of the project) it should be considered while writing the Excellence part of the project proposal.
Associated partners linked to a beneficiary	'Associated partners linked to a beneficiary' are organisations with an established capital or legal link with the beneficiary, which is not limited to the action nor specifically created for its implementation.
	These entities implement action tasks described in Annex 1 of the grant agreement, i.e. hosting and training of researchers in Postdoctoral Fellowships.
	The associated partners linked to a beneficiary do not have the right to claim unit contributions and may not employ the researcher under the action.
	In addition, they must fulfil the eligibility conditions for participation and funding applicable to the beneficiary they are linked to.
	The type of link and involvement of such entities must be clearly described

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[1] Definition from the European Commission's High-Level Expert Group on Artificial Intelligence, https://ec.europa.eu/futurium/en/system/files/ged/ai_hleg_definition_of_ai_18_december_1.pdf

	in the proposal and will be assessed as part of the evaluation.
	Examples of associated partners linked to a beneficiary that could be relevant for PF:
	1. Company A established in France holding 20% of the shares in Company B established in Italy. However, with 20% of the shares, it has 60% of the voting rights in company B. Therefore, company A controls company B and both companies may be affiliated entities.
	2. Company X and company Y do not control each other, but they are both owned by company Z. They are both considered affiliated entities.
Critical risk	A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.
	Level of likelihood to occur (Low/medium/high): The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.
	Level of severity (Low/medium/high): The relative seriousness of the risk and the significance of its effect.
CORDIS	Community Research and Development Information Service – It is the European Commission's primary public repository and portal to disseminate information on all EU-funded research projects and their results in the broadest sense. In this web service you can find information (calls, projects, partners, contacts) about all European projects financed by Directorate – General Research.
	CORDIS
Deliverable	A report that is sent to the European Commission or REA providing information to ensure effective monitoring of the project. There are different types of deliverables (e.g., a report on specific activities or results, data management plans, other documents, ethics or security requirements, software products, technical diagram brochures, etc.).
	Deliverables must be produced at a given moment during the action. Each work package will produce one or more deliverables during the project.
Evaluation criteria	The criteria against which independent expert assess eligible proposals. For MSCA they are related to excellence, impact, and quality and efficiency of implementation.
Evaluation process for MSCA	Each full proposal is evaluated by at least three experts, but in some cases more experts are needed who know about the full range of disciplines and sectors covered by the proposal. Experts work individually. They give a score for each criterion, with explanatory comments which is indicated in Evaluation summary report. After carrying out an individual evaluation, an expert will join other experts who have evaluated the same proposal in a consensus group, to agree on a common position, including comments and scores. Before notifying coordinators of the final evaluation results, the Commission reviews the results of the experts' evaluation and puts together the final ranking list.
ESR – Evaluation summary report	An evaluation summary report is the assessment of a particular proposal following evaluation by independent experts. The ESR contains both comments and scores for each criterion.
GA – Grant Agreement	The grant agreement is the legal instrument that provides for Commission funding of a successful proposal.
	Grant Agreement preparation procedure
Impacts	Wider long-term effects on society (including the environment), the

	economy and science, enabled by the outcomes of R&I investments (long term). Impacts generally occur sometime after the end of the project. For this call Impacts refers to subsection 2.3 Example: *The deployment of the advanced forecasting system enables each airport to increase maximum passenger capacity by 15% and passenger average throughput by 10%, leading to a 28% reduction in infrastructure expansion costs.*
Milestone	Control points in the project helping to chart progress. Milestones may correspond to the achievement of a key result, 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 project where, for example, the consortium must decide which of several technologies to adopt for further development. The achievement of a milestone should be verifiable.
MSCA Green Charter	MSCA green charter is a code of good practice for individuals and institutions that are in receipt of MSCA funding. It promotes the sustainable implementation of research activities. The goal of the green charter is to encourage sustainable thinking in research management. This document can give you some ideas while writing the implementation section of your project proposal. More information is available on https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-green-charter.
Objectives	The goals of the work performed within the project, in terms of its research and innovation content. This will be translated into the project's results. **These may range from tackling specific research questions, demonstrating the feasibility of an innovation, sharing knowledge among stakeholders on specific issues. These points could be considered in each and every proposal.** **The nature of the objectives will depend on the type of action, and the scope of the topic.**
Outcomes	The expected effects, over the medium term, of projects supported under a given topic. The results of a project should contribute to these outcomes, fostered in particular by the dissemination and exploitation measures. This may include the uptake, diffusion, deployment, and/or use of the project's results by direct target groups. Outcomes generally occur during or shortly after the end of the project. Example: *9 European airports adopt the advanced forecasting system demonstrated during the project.*
Open Science	Open science is an approach based on open cooperative work and systematic sharing of knowledge and tools as early and widely as possible in the process. Open science practices include early and open sharing of research (for example through pre-registration, registered reports, pre-prints, or crowd-sourcing); research output management; measures to ensure reproducibility of research outputs; providing open access to research outputs (such as publications, data, software, models, algorithms, and workflows); participation in open peer-review; and involving all relevant knowledge actors including citizens, civil society and end users in the co-creation of R&I agendas and contents (such as citizen science).
Research output	Results generated by the action to which access can be given in the form of scientific publications, data or other engineered outcomes and

	processes such as software, algorithms, protocols and electronic notebooks.
Results	What is generated during the project implementation? This may include, for example, know-how, innovative solutions, algorithms, proof of feasibility, new business models, policy recommendations, guidelines, prototypes, demonstrators, databases and datasets, trained researchers, new infrastructures, networks, etc. Most project results (inventions, scientific works, etc.) are 'intellectual property', which may, if appropriate, be protected by formal 'intellectual property rights'. Example: *Successful large-scale demonstrator: trial with 3 airports of an advanced forecasting system for proactive airport passenger flow management.*
Supervision	Employers and/or funders should ensure that a person is clearly identified to whom researchers can refer for the performance of their professional duties, and should inform the researchers accordingly. Such arrangements should clearly define that the proposed supervisors are sufficiently expert in supervising research, have the time, knowledge, experience, expertise and commitment to be able to offer the postdoctoral researcher appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms. While the **MSCA Guidelines on Supervision** are non-binding, **funded-projects are strongly encouraged to take them into account.**
Secondments vs Non-academic placement	The non-academic placement is not a secondment. An **optional secondment** is a temporary transfer to another entity in any sector, anywhere in the world at any time during the action, typically to perform part of the research or to gain experience. Secondments do not have a separate budget and can take place for up to a maximum of one third of the standard duration of the project. **Non-academic placements** also involve mobility to another entity, located in an EU member state or associated country, but can only take place to an organisation in the non-academic sector and after the end of the regular duration of the project. Non-academic placements have a dedicated budget. **Both secondments and placements** are expected to include supervision, to bring a clear added value to the research proposal, and should be covered by the employment contract with the beneficiary. Further information can be found in the guide for applicants. The non-academic sector placement must be encoded in part A of the proposal and described in part B. In part A of the submission wizard, the name of the associated partner where the non-academic placement will take place must be encoded as a participating organisation ("associated partner") in the tab "participants". The associated partner needs to have a Personal Identification Code (PIC). In Part B1 (under sub-criterion 1.3 and 3.2), the relevance and added-value of the non-academic placement period will be assessed by the evaluators and may therefore impact the final score awarded to the proposal. In Part B2, the non-academic placement host must provide an up-to-date letter of commitment, to be submitted with the application, confirming their precise role and active participation in the proposal.

	Secondment hosts should not be encoded as associated partners; this is only intended for non-academic placement hosts and associated partners for the outgoing phase for Global Fellowships. More clarifications about the difference between optional secondments and placements can be found **here**.

Abstract

- ✓ The abstract is a short description of your project in maximum 2000 characters including spaces.
- ✓ The main elements are:
    - o 1-2 sentences that put your project into context
    - o Your research objective
    - o Background information on the state of the art
    - o Specific aims and details of your project plan
- ✓
- ✓ Abstracts in part A should not contain sensitive information, as they will be made publicly available if the project is retained for funding.

- ✓ The abstract and keywords are used to select the evaluators. Description on how to select the keywords is available on a **specific FAQ**.

- ✓ An abstract should 'sell' your project and be understandable to the non-expert.

- ✓ It should communicate the importance, impact and timeliness of the project and also convince the evaluator that you should be funded to carry it out.

- ✓ It should **NOT** be the usual scientific abstract.

- ✓ See ideas of existing projects in CORDIS (using filters **Projects – H2020 – Marie Sklodowska-Curie actions Individual Fellowship**)

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Part B-1

1. Excellence

1.1   Quality and pertinence of the project's research and innovation objectives (and the extent to which they are ambitious, and go beyond the state of the art)

At a minimum, address the following aspects:
- Describe the quality and pertinence of the R&I objectives; are the objectives measurable and verifiable? Are they realistically achievable?

➢ Explain the research context of your project and introduce your project's subject.
➢ Explain the importance of the research being carried out and how it addresses a challenge/priority at a global/European level.
➢ Describe the specific research objectives (ROs) of the project. These should give the evaluator an insight into what research will be carried out during the project and should be feasible.
➢ Each research objective should correspond to the research work packages. For example, objective 1 is the objective for research WP 1. Number the objectives O1, O2, O3 etc. and include the corresponding work package in brackets at the end of each objective (WP1).

- Describe how your project goes beyond the state-of-the-art, and the extent to which the proposed work is ambitious.

➢ Break the state-of-the-art (SOA) into separate short paragraphs, each focussing on a specific research objective of the project.
➢ For each paragraph, briefly outline the current level of knowledge in the research area and highlight how the project will progress the research '**beyond the current state-of-the-art**'. Use up-to-date references and ask your supervisor for assistance.
➢ If there is SOA work being carried out by your supervisor or by you then mention this here (as it demonstrates your excellence and adequacy to carry out the research).
➢ You could finish each paragraph with a **bold /text-box statement** of how the project is progressing the area beyond the current state-of-the-art.

STRENGHTS FROM THE EVALATION SUMMARY REPORTS
1. The proposed work is ambitious and goes beyond the current state of the art. The hypothesis and objectives are highly innovative and realistic, and the proposed work is expected to advance this research field substantially.
2. The research objectives are laid out in a clear and concise way and are founded very well in the presented background. The objectives are innovative, relevant, realistically achievable, measurable, verifiable and address a matter of high importance
3. This is a very timely proposal, which addresses an important theme in a very good and relevant way.
4. The proposal is ambitious and innovative, with intersectoral objectives promising relevant outputs.
5. The state of the art is very well documented with up-to-date references and it supports well the scientific objectives of the proposal.
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. The originality and innovation potential of the proposal is not outlined in a sufficiently convincing and detailed manner, particularly as the background on recent developments in

> *the field of the proposal is not presented in sufficient detail to support the working hypotheses.*
> *2. The proposal lacks a clear identification of measurable criteria for verifying the fulfilment of the proposed objectives.*
> *3. The proposal seems a bit overambitious in some parts and displays certain lack of focus by including a too large variety of different approaches.*
> *4. In general, the ideas are not structured clearly or concretely enough. Almost every section reads like a collection of buzz words and unclarified words with details that do not hang together sufficiently, making it difficult to understand what exactly is proposed, and to assess quality. For instance, there are sections focusing more on implementation than on quality/pertinence and innovation objectives.*
> *5. The proposal does not describe in sufficient detail the degree of innovation, as numerous high ranking groups worldwide pursue similar approaches in the field.*
> *6. The state-of-the-art description is not convincing. It is not sufficiently elaborated to establish the level of innovation in the proposed work.*

1.2 Soundness of the proposed methodology (including interdisciplinary approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality of open science practices)

At a minimum, address the following aspects:

- <u>Overall methodology:</u> Describe and explain the overall methodology, including the concepts, models and assumptions that underpin your work. Explain how this will enable you to deliver your project's objectives. Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them.

➢ In this section you should describe how the research project will be carried out. Break this section up into short paragraphs/bullet points to describe the steps/methods you will take to achieve the research objectives proposed (put in brackets the research objective and work package it relates to). At the implementation part, the workplan (specific tasks) relating to the research WP will be described in detail in section 3.1.

➢ Highlight the experiments, blocks of work to carry out, techniques and equipment that will be used especially in a novel way. If there will be new analysis, concept, methods implemented – mention and highlight it (bold).

➢ If a secondment, non-academic placement or short visits are included, be specific about why they are needed in terms of the work being carried out (use of equipment, access to data etc).

➢ Be careful here as you do not have space to describe everything in detail as the proposal is 10 pages long but you must give enough detail to show how the research will be conducted.

- <u>Integration of methods and disciplines to pursue the objectives:</u> Explain how expertise and methods from different disciplines will be brought together and integrated in pursuit of your objectives. If you consider that an inter-disciplinary[2] approach is unnecessary in the context of the proposed work, please provide a justification.

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[2] Interdisciplinarity means the integration of information, data, techniques, tools, perspectives, concepts or theories from two or more scientific disciplines.

➢ Interdisciplinarity means the integration of information, data, techniques, tools, perspectives, concepts or theories from two or more scientific disciplines. These aspects will be assessed during the evaluation. The term discipline refers to the first level of MSCA keywords. A list of MSCA keywords is available on: **https://rea.ec.europa.eu/system/files/2021-10/MSCA%20Keywords.pdf**

➢ State if you are working with a mix of disciplines and demonstrate how the research being carried out goes beyond the discipline that is strictly yours – explain the synergy between disciplines and do not just list them.

➢ Highlight the key interdisciplinary aspect of your proposal (methodology, supervision, dissemination, etc.)

➢ If you consider that an inter-disciplinary approach does not apply, provide a justification.

- <u>Gender dimension and other diversity aspects</u>: Describe how the gender dimension and other diversity aspects are taken into account **in the project's research and innovation content**. If you do not consider such a gender dimension to be relevant in your project, please provide a justification.
  - ⚠ Remember that that this question **relates to the <u>content</u> of the planned research and innovation activities**, and not to gender balance in the teams in charge of carrying out the project.
  - ⚠ Sex, gender and diversity analysis refers to biological characteristics and social/cultural factors respectively. For guidance on methods of sex / gender analysis and the issues to be taken into account, please refer to this page.

➢ In other words, you should take into account biological characteristics (sex) and social/cultural features (gender) in your research. Ask yourself the following questions:
  - Does it matter whether test persons are male or female?
  - Will the results affect male and females in the same way?
  - Does the methodology ensure that (possible) gender differences will be investigated: that sex/gender differentiated data will be collected and analysed throughout the research cycle?
  - Are questionnaires, surveys, focus groups, etc. designed to unravel potentially relevant sex and/or gender differences in your data?
  - Are the groups involved in the project (e.g. samples, testing groups) gender-balanced?

➢ Note that it is also possible to address the gender dimension through training and communication/dissemination activities.

➢ More questions on gender aspect in research are available on **https://docs.wixstatic.com/ugd/17c073_22d7b327acc8434a91dbceba1898e7d2.pdf**

➢ Apart from gender dimension in research, and if applicable, include other diversity aspects to better address the multiple and interacting factors of inequality experienced by R&I actors, such as other social categories and identities such as ethnicity and race (including migrants and refugees), social class and wealth, gender identity, and sexual orientation (LGBTI+ issues) and disability.

➢ An example of a useful resource listing what could be considered under the other diversity aspects, or new intersectional approach can be found in publication Gender equality and diversity in R&I. If your research is not concerned by gender issues or other diversity aspects you should clearly explain why.

- <u>Open science practices</u>: Describe how appropriate open science practices are implemented as an integral part of the proposed methodology. Show how the choice of practices and their implementation is adapted to the nature of your work in a way that
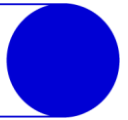
will increase the chances of the project delivering on its objectives *[e.g. up to 1/2 page, including research data management]*. If you believe that none of these practices are appropriate for your project, please provide a justification here.

➢ You have to provide concrete information on how you plan to comply with the mandatory open science practices. Be concrete because you have up to half a page for this!

Mandatory OS practice
✓ Open access to scientific publications under the conditions required by the grant agreement (GA);
✓ responsible management of research data in line with the FAIR principles of 'findability', 'accessibility', 'interoperability' and 'reusability',
✓ information about the research outputs/tools/instruments needed to validate the conclusions of scientific publications or to validate/re-use research data;
✓ digital or physical access to the results needed to validate the conclusions of scientific publications, unless exceptions apply;
✓ in cases of public emergency, if requested by the granting authority, immediate open access to all research outputs under open licenses or access under fair and reasonable conditions to legal entities that need the research outputs to address the public emergency

➢ You need to show how OS implementation is adapted to the nature of your work, therefore increasing the chances of the project delivering on its objectives
➢ In addressing OS practice take into account:
❖ **Early and open sharing:** specific information of what type of early and open sharing is appropriate (if applicable) for your discipline and project, such as preprints or preregistration/registration reports, and which platforms you plan to use.

❖ **Reproducibility of research outputs:** you should outline the measures planned in the project that tend to increase reproducibility. Such measures may already be interweaved/mentioned in other parts of the methodology of a proposal (such as transparent research design, the robustness of statistical analyses, addressing negative results, etc.) or in mandatory/non-mandatory open science practices (e.g. the Data Management Plan, early sharing through preregistration and preprints, open access to software, workflows, tools, etc.).

❖ **Open access (OA):** Offer specific information on how you will meet the OA requirements, that is deposition and immediate open access to publications and OA to data through a trusted repository, and under open licenses. You may elaborate on the publishing venues that you will use and/or trusted repository/repositories through which OA to publication and research data will be provided.

OA should be "**as open as possible and as closed as necessary**", remaining "open" in order to foster the accessibility, reusability and to accelerate research, but at the same time information should be "closed" to safeguard the privacy of the subjects (protection of the private data), protecting results that can reasonably be expected to be commercially or industrially exploited, keeping confidentiality in connection with security issues.

As a general rule, OA to other research outputs such as software, models, algorithms, workflows, protocols, simulations, electronic notebooks and others is not required but

strongly recommended. Access to 'physical' results like cell lines, bio specimens, compounds, materials, etc. is also strongly encouraged.

❖ **Open peer review:** Anytime it is possible, you are invited to prefer open peer review for your publications over traditional ('blind' or 'closed') peer review. When the case, you should provide specific information regarding the publishing venues you envisage to make use of, and highlight the venues that would qualify as providing open peer review

❖ **Citizen, civil society and end-user engagement:** Provide clear and succinct information on how citizen, civil society and end-user engagement will be implemented in your project, where/if appropriate – methodological approaches depending of the type of research activities:
   ▪ co-design activities (such as workshops, focus groups or other means to develop R&I agendas, roadmaps and policies)
   ▪ co-creation activities (involving citizens and/or end-users directly in the development of new knowledge or innovation, for instance through citizen science and user-led innovation);
   ▪ co-assessment activities (such as assisting in the monitoring, evaluation and feedback to governance of a project, projects, policies or programmes on an iterative or even continual basis).

➢ Recommendation is that you provide OA to research outputs beyond publications and data (software tools, models, apps, etc.) and share them as early and openly as possible – providing guidance for potentially interested users
➢ A clear explanation of how they will adopt recommended practices, as appropriate for projects, will result in a higher evaluation score

Recommended OS practice
✓ Open science practices beyond the mandatory ones, such as involving all relevant knowledge actors, including citizens, early and open sharing of research, output management beyond research data, open peer-review, preregistration of research, (i.e., specifying your research plan in advance of your RESEARCH and submitting it to a registry).

⚠ *Please note that this does not refer to outreach actions that may be planned as part of the communication, dissemination and exploitation activities. These aspects should instead be described below under 'Impact'.*

• <u>Research data management and management of other research outputs</u>: Applicants generating/collecting data and/or other research outputs (except for publications) during the project must explain how the data will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable).

Research data management (RDM) is the process within the research lifecycle that includes the data collection or acquisition, organisation, curation, storage, (long-term) preservation, security, quality assurance, allocation of persistent identifiers (PIDs), provision of metadata in line with disciplinary requirements, licencing, and rules and procedures for sharing of data.

➢ RDM is an essential element in any project that generates, collects or re-uses data

➢ If you expect to generate or reuse data and/or other research outputs (except for publications), you are required to outline in a maximum of 1/2page (including OS practices) how these will be managed.

➢ If using the European open science cloud (EOSC) federated repositories, you should explicitly discuss the use of such repositories in the proposal.

➢ Show best practice in RDM – including provisions required to be in place to ensure that data is managed responsibly (e.g. the right venue is chosen for deposition,-legal provisions such as general data protection regulation (GDPR) are respected, etc.).

➢ Data management should be in line with the FAIR principles, to ensure that researchers can find, access and re-use each other's data, maximising the effectiveness and reproducibility of the research undertaken.

➢ RDM, in line with the FAIR principles is a requirement that should be carried out regardless of whether the data generated and re-used in the project is intended to be openly accessible, or if access restrictions are foreseen.

➢ FAIR data is not equivalent to open data (publicly available to everyone to access and reuse). Data can, and should be FAIR, even when access is restricted.

➢ More details should be provided in data management plan (DMP), which is not required at submission stage but it is mandatory deliverable. In the text explain that further details will be provided in DMP.

⚠️ *For guidance on open science practices and research data management, please refer to the relevant section of the HE Programme Guide on the Funding & Tenders Portal.*

STRENGHTS FROM THE EVALUATION SUMMARY REPORTS
1.The methodology is generally sound, comprehensive, and clear. The use of new technologies is mainly justified and consistent with the research objectives. Most methodological challenges are clearly recognized and detailed fall back strategies are presented. Both experimental and computational aspects are described in detail, and the approach is overall credible and well-formulated.
2. The project employs relevant techniques and methods from interdisciplinary fields, which are brought together smartly and well integrated.
3. The gender dimension and other diversity aspects are very well identified, and gender, age and ethnicity will be incorporated in the proposed models.
4. The proposed open science practices are convincing and well described, considering FAIR principles for data, models and papers.
5. Open science practices are well addressed, and concrete actions and protocols are described to comply, including making the data accessible through public databases.

WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. The proposed methodology is supported by previous work of the researcher. While the methodology is explained in general terms and is mostly a descriptive one, it lacks some information on the concrete methods to be used.
2. The proposal fails to fully justify the value of interviews and questionnaires for the research (e.g., it does not adequately address how representability will be achieved).
3. The proposal insufficiently addresses how specific concepts and assumptions from different disciplines named as relevant would be deployed to ensure an interdisciplinary approach.
4. The gender dimension and other diversity aspects could be relevant for the research. However, these have not been taken into account sufficiently in the proposal's research and innovation content and an insufficient justification has been provided.
5. Significant dimensions of intersectional subjectivity and inequality, such as class and

> *race, are not addressed sufficiently in the conceptual foundation of the proposal's approach.*
> *6. Open science practices are not sufficiently clarified; the analysis of reproducibility and replicability of results, is not satisfactorily discussed.*

1.3   Quality of the supervision, training and of the two-way transfer of knowledge between the researcher and the host

At a minimum, address the following aspects:
- Describe the qualifications and experience of the supervisor(s). Provide information regarding the supervisors' level of experience on the research topic proposed and their track record of work, including main international collaborations, as well as the level of experience in supervising/training, especially at advanced level (i.e. PhD and postdoctoral researchers).

➢ Provide a few sentences on supervisor's key achievements: years of experience in the field, examples of awards, international, intersectoral and interdisciplinary collaboration, examples of the coordinated projects and number of publications (most important journals, H-Index..), patents (especially if they are closely connected to your research – remember the state-of-the art), number of supervised researchers (is there any success story – are the supervised researchers now in the leading positions..).

➢ You should have a suitably qualified supervisor who is close to your research field. Highlight in particular if the supervisor has an international career with experience in implementing EU projects (especially ones involving postdocs).

➢ If you are having a co-supervisor, shortly explain his/her added value. Co-supervisors can be members of the same research team as the main supervisor. Co-supervision is encouraged, but the respective roles of both co-supervisors should be clearly defined and complementary.

➢ If applicable, explain the value of the supervisor during the secondments, non-academic placement and during outgoing phase of the Global Fellowship.

➢ Be very brief with all relevant information – you can provide more information in table B2 in section 5!

- Planned training activities for the researcher (scientific aspects, management/organisation, horizontal and key transferrable skills...).

➢ Briefly mention career development plan (CDP) and that you will develop it with your supervisor.

➢ Describe your needs and how you want your career to develop.

➢ Identify your weaknesses in your current set of skills and find trainings and opportunities at the hosting institution that will fit your needs.

➢ For more information you can use EURAXESS career development tools: **https://euraxess.ec.europa.eu/sites/default/files/euraxess_career_handbook.pdf**

For the training subsection, after identifying a set of skills that are needed, describe how you will acquire these new skills and the relevance of the additional scientific and transferable skills training:

Scientific skills
• Which new techniques and methods will be acquired?
• How will they be acquired? Through research or through specific courses? Ask your supervisor for suggestions on potential trainings
• Training on "Research integrity ", "open science ", digital techniques, tools, new techniques

Transferable skills
• Teaching as well as tutoring/mentoring of students and doctoral candidates (→ leadership/communication skills)
• Project/financial/organisational management (project planning, organisation of a conference)
• Development and organisation of follow-up projects (fundraising, proposal writing)
• Acquisition/development of abilities in working in an international environment (communication, building networks)
• Business thinking (through your own project)
• Handling intellectual property rights (IPR), training in patent law, course in gender awareness

➢ Highlight the complementarity between your profile, the one of your supervisor and the expertise of your host organisation.
➢ From the transfer of knowledge, it should be clear why your host institution is the perfect match regarding your scientific and transferable needs.
➢ Adjust training and transfer of knowledge to the specific needs of you as a researcher and the host organisation.
➢ "Doing more with less "- concentrate on a few training activities you really need instead of trying to be trained in everything → an unrealistic plan could be identified as a weakness.
➢ What new knowledge will you gain during the fellowship and how it will be acquired (staff development programmes, workshops, seminars, online courses, internal meetings).
➢ Outline previously acquired knowledge and skills that you will transfer to organisation. Ask yourself how can your expertise promote the host institution?
➢ Detail how any scientific (unique) expertise can be transferred to the host organisation e.g. via teaching and/or mentoring undergraduates and PhD students'
➢ Demonstrate, if relevant, how you will be providing new network opportunities for the host institution.

- For *European Fellowships*: two-way transfer of knowledge between the researcher and host organisation.
- For *Global Fellowships*: three-way transfer of knowledge between the researcher, host organisation, and associated partner for outgoing phase.

➢ For Global Fellowships explain how the newly acquired skills will be transferred back to the European host institution and how they will be integrated e.g., additional trainings for the research team, new methods and techniques that you will use in your research.

- Rationale and added-value of the non-academic placement (if applicable).
➢ Highlight intersectoral – interdisciplinary training during the placement/secondment – why is it important (for example testing technical development during the fellowship), when will it be planned and what knowledge will be acquired.

➢ Examples of added value could include that you will acquire management and leadership skills – you will need them in your non-academic future and as an independent and mature researcher e.g. if you are considering spin-off of your future academic applicable results.

If you will have enough space, you can use a table or graphics to describe your transfer of knowledge. Example of a table:

Specific research skills to be transferred	How it will be transferred	Audience of the host organisation (students, other team members…)	Benefit to the host organisation

⚠ *Supervision is one of the crucial elements of successful research. Guiding, supporting, directing, advising and mentoring are key factors for a researcher to pursue his/her career path. In this context, all MSCA-funded projects are encouraged to follow the recommendations outlined in the MSCA Guidelines on Supervision.*[3]

STRENGHTS FROM THE EVALUATION SUMMARY REPORTS
1. The proposal lists several fields for the training at the host institution along with the format of the training. The effectiveness of the training activities is very well demonstrated.
2. Training is of good quality consisting of scientific tutoring organized by the supervisors and training in soft skills by the university career development office.
3. The transferable skill training is very well documented and planned for the researcher. It will cover project management, leadership, scientific writing, oral communication teaching and even bio-safety.
4. The supervisor is a leading scholar in the research field and has a solid track record of publications and grant applications. The numerous international collaborations of the supervisor will allow the researcher to expand their international networking.
5. The two-way transfer of knowledge between the researcher and the host is thoroughly identified and explained. The means by which it would happen are very well specified and are highly credible. The training received during the planned short visit can benefit both the researcher and the host.
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. The training activities cover most aspects of scientific, technical and management development, but are not outlined in concrete terms, e.g. the number and frequency of seminars or workshop participation.
2. Training skills to be acquired by the researcher are not convincingly described. The transfer of scientific knowledge to be acquired by the researcher in the return phase is not sufficiently detailed nor is the transfer of knowledge from the researcher to the hosts.
3. The proposal does not demonstrate sufficiently that the supervisors at the outgoing host have sufficient supervision experience
4. The host supervisor's experience in research supervision and the frequency and modality of supervision are not sufficiently detailed.
5. The two-way transfer of knowledge is not described with sufficient details: the training activities are general and vague. Although the researcher has competences related to the project, it is not clearly explained how they will be transferred to the host and how different are they, when comparing to those already existing in the host institution.

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[3]

1.4 Quality and appropriateness of the researcher's professional experience, competences and skills

Discuss the quality and appropriateness of the researcher's **existing** professional experience in relation to the proposed research project.

➢ Describe why you are the best person to do this fellowship! Tell your professional experience to date and what led you to this point. Try to get the evaluator to relate & understand you. Keep them interested!
➢ Explain why your scientific background is unique (think of the TOK to host organisation), you have excellent potential, you are perfectly able to carry out the project. Demonstrate how you have key transferable skills (leadership skills and independent thinking).
➢ Choose the key highlights from your CV[4] (section 4) to show the evaluator your abilities (research achievements, fellowships and awards received, key conferences, publications, experience in project management, experience in supervision, non-academic sector, etc.).
➢ If you are having some literature, or fieldwork on non-English or your non-native language, provide information that you have the basic of language knowledge to understand literature.

STRENGHTS FROM THE EVALUATION SUMMARY REPORTS
1. The researcher has received adequate research funding, including a Ph.D. scholarship, travel grants, and a small seed corn fund, which supports the high quality and appropriateness of the researcher's professional experience and competencies.
2. The researcher's CV is very competitive, with high quality and impact publications, international mobility and a multitude of relevant transferable skills. The professional experience and competences of the researcher are highly appropriate for the proposal.
3. The institution has experience in hosting international researchers and the host group will be an excellent environment for the researcher
4. The expertise of the supervisors and of the host research group is well documented, and match very well with the proposal. The scientific experiences of the two supervisors are finely complementary.
5. The planned non-academic placement is well described and its value for the project is very convincingly demonstrated, enabling the researcher to gain experience beyond academia and acquire new competences relevant to their profile, especially through the training of teachers.
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. Some aspects of the proposed research fall outside the researcher's current expertise and will require extensive training; this is not addressed in a sufficient manner.
2. The researcher's peer-reviewed publication record (one article published and one under review) is low for their career stage, a lack of which is not sufficiently catered for in the training programme.
3. The administrative and leadership experience and skills of the researcher appear to be overstated as they are not based on evidence provided in the proposal or their CV.
4. The supervision of the researcher is not adequately described given the large number of experts at the host and at the secondments involved.
5. The plan for the supervisory meetings to create and monitor progress on the career perspectives is not sufficiently detailed to convincingly demonstrate adequate mentorship from the primary supervisor.

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[4] NB Your CV in Part B2 Section 4 will be reviewed to confirm information given in section 1.4.

2. Impact

2.1   Credibility of the measures to enhance the career perspectives and employability of the researcher and contribution to his/her skills development

At a minimum, address the following aspects:
- **Expected** skill development of the researcher.
- **Expected** impact of the proposed research and training activities on the researcher's career perspectives inside and/or outside academia.

➢ Give specific examples of your career opportunities in the academic & non-academic sectors after the fellowship.
➢ Where do you want to go (long-term career perspectives) and how does this project contribute to it (tenure track position, initiating a new laboratory or a research group, becoming a pioneer researcher in your specific filed, new position in industry, potential ERC application)?
➢ Explain why the skills & experiences (research-related and transferable) acquired during the fellowship would benefit future employers and contribute to better quality research and innovation? Give specific examples.
➢ Describe and highlight the impact of the collaborations (especially intersectoral and interdisciplinary) made during the fellowship – for example, will they result in a higher impact R&I output from your future work, thus more knowledge and ideas converted into products and services?
➢ Describe the sustainability of these collaboration and potential new projects.
➢ If applicable, highlight the importance of the non-academic placement.

Example of impact on your career development
Now you are at 80% → the MSC-PF gives you the missing 20%
- You will be integrated into existing European and international networks of the host institution and also have created your own (transnational) networks
- Your strengthened project management skills will result in better-managed research and innovation projects and will strengthen the likelihood of careers/positions across sectors.
- Your enhanced leadership skills, developed through 'x' course and supervision of undergraduate and PhD students will make you more employable and competitive in applying for future leadership roles.
- You will be able to work in an international and interdisciplinary research environment

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STRENGHTS FROM THE EVALUATION SUMMARY REPORTS
1. The action will allow the researcher to acquire novel scientific skills and a range of soft skills that will undoubtedly increase the employability of the researcher in academia. The international networking opportunities provided by the supervisor will have a beneficial impact on the researcher's future career.
2. The proposal convincingly describes how the career perspectives of the researcher would be improved in academia and the public sector. The interdisciplinarity of the proposal and the respective training and mentoring activities would certainly enhance the theoretical, technical, and management skills of the researcher, facilitating career

prospects in academia and beyond.

3. The researcher will have a unique opportunity to benefit from the scientific atmosphere, exchange, and networking opportunities, offered by the host institution for the outgoing phase.

4. The planned training activities will significantly enhance the skill set of the researcher in both the scientific and non-scientific sector. These new skills together with the attainment of the research targets and dissemination to the scientific community, the strong international networking opportunities, and the possibilities for follow-up projects will clearly enhance their career perspectives.

5. The proposal explains properly how the researcher's further development of technical and complementary skills will increase their employability in the academic sector. The researcher will acquire new research competencies and additional skills, such as new scientific skills in cutting-edge technologies, and will gain several complementary skills, such as organizational and management skills.

WEAKNESSES FORM THE EVALUATION SUMMARY REPORT
1. It is not sufficiently clear how the proposal will contribute to the professional maturity as an independent researcher, and thus enhance their career perspectives and employability. 2. The researcher has several years of experience as a postdoctoral fellow in a closely related field. The measures to enhance career perspectives have been generically and superficially described, and it is not sufficiently clear how would gaining additional skills further improve the employability of the researcher beyond the current state. 3. The specific measures to enhance the researcher's career beyond the project's duration, including soft skills and preparation for job market, are not sufficiently well described in the proposal. 4. The measures to enhance the researcher's intersectoral career perspectives are not appropriately reflected in the proposal. The employability in university spinoffs (highlighted by the applicant) is not addressed adequately. 5. Measures to enhance the researcher's career are not fully convincing. The proposal does not sufficiently explain how it would contribute to achieve the researcher's goals. For example, the proposal mentions plans to submit research funding applications in the future, but the proposal activities do not include the elaboration of skills for such applications.

2.2 Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities

At a minimum, address the following aspects:

- Plan for the dissemination and exploitation activities, including communication activities:[5] Describe the planned **measures to maximize the impact** of your project by providing a first version of your 'plan for the dissemination and exploitation including communication activities'. Describe the dissemination, exploitation **measures that are planned, and the target group(s) addressed (e.g. scientific community, end users, financial actors, public at large).** Regarding communication measures and public engagement strategy, the aim is to inform and reach out to society and show the activities performed, and the use and the benefits the project will have for citizens. Activities must be strategically planned, with clear objectives, start at the outset and continue through the lifetime of the project. The description of the

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[5] In case your proposal is selected for funding, a more detailed Dissemination and Exploitation plan will need to be provided as a mandatory project deliverable during project implementation

communication activities needs to state **the main messages as well as the tools and channels that will be used** to reach out to each of the chosen target groups.

➢ Detail the **dissemination activities** you will use. Examples include: conferences, industry events, journal publications, workshops, social media, tradeshows, book chapter etc.
➢ Describe who the target audiences and what the main messages are. Who will be interested in the results described and why (benefit)? For example:
o Industry examples that could use the results for further development,
o Research fields (give examples),
o Expert users (clinicians, companies, services etc.),
o Regulators,
o Types of policy makers that would use the results,
o Associations who would be interested in the results.

➢ Do not confuse this with communication to public audiences

Communication and public engagement	Dissemination and exploitation
• About the project and results. • Starts at the beginning of the project. • Multiple audiences. • Inform and reach out to society, show the benefits of research. • General media, social media, different type of events, popular science publications.	• About results only. • When results are available and after the end of the project. • Potential professionals that may use the results in their own work. • Enable use and uptake of results. • Publications, conference presentations, patents.

➢ Provide targeted draft plans for both dissemination and communication activities.
➢ All the activities should be included in work package table & Gantt chart (section 3.1).
➢ Summarise each dissemination activity with specific & realistic details, using a table. For example:

Activity	Target audience	When	Where	Key indicators (KPI)
Conference (provide the full name)	List the target audience that will participate to the conference	Estimated month of project when it will take place (M12, M14)	If known at the time of the project proposal application	Number of attendees, etc.

➢ Think of quantifiable performance indicators based on SMART[6] objectives – establish a benchmark:

Media coverage	Number of media outlets, audience, tone of coverage…
Web sites	Page views, unique visitors, time spent, downloads…
Social media	Followers, likes, shares, interactions, engagement rate…
Publications	Citations
Events	Number of participants, opinion surveys, follow up rate…

➢ Don't confuse number of activities with impact of activities and engagement.

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[6] Objectives should be specific, measurable, achievable, realistic and timely

➢ For the **communication activities**, first describe the target audiences for communication of project activities. These should be non-expert audiences:
- University students
- Primary/ secondary schools
- End users (e.g., patients, older adults, young people)
- Media (editors, journalists etc.)
- Community groups, charities
- MSCA and Citizens (European Researchers' Night and Researchers at school) attendees
- General public

➢ What are the key messages you wish to communicate to the different audiences?
➢ How does the action's work relate to our everyday lives?
➢ Why does the target audience need to know about the action (encourage a career in research, increase the gender balance in certain areas etc.)?
➢ Describe how you will reach the various audiences through the following communication activities:

One-way exchange
Examples include:
▪ An article in a newspaper or on TV or radio
▪ Use of social media
▪ Writing blogs to publish on host website – if you are going to have a website, provide information on how will target groups will find out about it (use host's PR department, MSCA NCPs, your own social media (LinkedIn, Twitter, etc.))
▪ Press release

Two-way exchange
Examples include:
▪ Open door communication: Students/public visit your institution/lab etc. to discuss project activities.
▪ Visit schools, universities, community organisations to promote your research, summer schools
▪ Public/societal engagement events (MSCA and Citizens (European Researchers' Night, Researcher at school) Pint of Science etc.)

➢ For the **exploitation activities**, ask yourself what is the benefit of exploiting results? How will the results of the project be exploited?
➢ Mention applicability and commercialisation of the research results (e.g., new product/service, new techniques/methods), possible patents.
➢ Describe the potential exploitation methods of your project results that will be used and the impact of the method on the target user/society/industry:
- **Further internal research:** The results coming out of the project can be applied to further research in the field and beyond.
- **Collaborative research:** The results can be used for building/contributing to collaborative research projects.
- **Product development:** Results can be used for developing or contributing to a product, process, technique, design etc.

o **Standardisation activities:** Results could be used to develop new standardisation activities or contribute to ongoing work.
o **Spin-offs:** A separate company could be established as a result of the research results.
o **Engagement with communities/end users/policymakers:** Describe the activities to ensure that relevant societal actors will benefit from your project. For example, results will be used in policy briefings to impact on policymaking.

• <u>Strategy for the management of intellectual property, foreseen protection measures</u>: if relevant, discuss the strategy for the management of intellectual property, foreseen protection measures, such as patents, design rights, copyright, trade secrets, etc., and how these would be used to support exploitation.

➢ Mention who you will seek advice from in your institution on these matters (e.g., technology transfer office, IPR office).
➢ Will you receive training in IP management/commercialisation? You can cross reference to section 1.3.
➢ Refer to and comply with the "MSCA rules" for IP. Have in mind the specifics of the MSCA and relevant characteristics:
   o Intersectoral exchange (academic/non-academic) requires different IP policies/interest, difference in publication and exploitation;
   o International dimension EU-MS/AC vs. third countries – different IP laws and regulations (specially for Global Fellowships);
   o Secondments focusing on the explanation of complementary competences of the participants (host organisation and secondment host organisation) – granting access to background/results for/by secondees (''visitors'').

➢ **Global Fellowships**: describe how you have decided to "allocate" IP between the two hosts?
➢ If not applicable in the short-term or immediately after your project, describe how your results may be applicable in the long-term (early-stage/discovery-based research is seldom applicable immediately)

➢ IPR must always be respected: refer to IP department of your institution, refer to the partnership agreement.

⚠ All measures should be proportionate to the scale of the project, and should contain concrete actions to be implemented both during and after the end of the project.

STRENGHTS FROM THE EVALUATION SUMMARY REPORTS
1. Outcomes and impacts are sufficiently argued, quantifiable, and credible (e.g. through scientific publications, international collaborations, and public engagement actions).
2. A good discussion on the impact of the research outcome beyond the immediate scope and duration of the proposal is provided.
3. The plan for the scientific dissemination of the results is clearly articulated and tailored to reach different specialized audiences, including private companies. Dissemination and exploitation activities are clearly outlined and specific, through publications, attendance in international conferences, web-based and social media platforms, and a dedicated project website.
4. The exploitation of the project results and IP protection are well justified in the proposal.

The researcher will get support from the innovation office which will help in knowledge transfer activities and will help to establish collaborations with the industry.
5. Researcher clearly targets some of the groups which are relevant to the research in the dissemination plan.

WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. The quantified estimates in terms of magnitude and importance of the proposal's contribution to the expected outcomes and impacts have not been sufficiently clearly presented and hence are not persuasive.
2. The target journals for the planned publications are not convincingly identified. Therefore, the impact of the publications is not fully evident.
3. The proposal does not address in sufficient detail dissemination of the project results to industry and application community.
4. The proposal lacks in detailing the dissemination and communication plan: a superficial description of scientific journals and conferences together with general outreach activities are listed, without proposing a clear and structured plan to address different target audiences.
5. Exploitation is insufficiently covered. It is unclear which results of the proposal will be made available for exploitation and how the research will go beyond publication.

2.3. The magnitude and importance of the project's contribution to the expected scientific, societal and economic impacts

Provide a narrative explaining how the project's results are expected to make a difference in terms of impact, beyond the immediate scope and duration of the project. The narrative should include the components below, tailored to your project.

⚠ Be specific, referring to the effects of your project, and not R&I in general in this field. State the target groups that would benefit.

➢ Have in mind that during the Horizon Europe implementation, the European Commission aims to achieve an impact-driven programme by maximising the effect of research and innovation. To achieve this aim, the EC identified key impact pathways as follows:

Key impact pathways	
Scientific impact	1. Creating high-quality new knowledge
	2. Strengthening human capital in research and innovation
	3. Fostering diffusion of knowledge and open source
Societal impact	4. Addressing EU policy priorities and global challenges through research and innovation
	5. Delivering benefits and impact through research and innovation missions
	6. Strengthening the uptake of research and innovation in society
Towards technological/ economic impact	7. Generating innovation-based growth
	8. Creating more and better jobs
	9. Leveraging investment in research and innovation

➢ Have in mind the limitation of the pages and the fact it's a non-beneficiary project[7] so you should not try to address all aspects of the key pathways. The concept of key pathways to impact could be discussed in proportion of the project and in very general terms in a proposal.

- Expected scientific impact(s): e.g. contributing to specific scientific advances, across and within disciplines, creating new knowledge, reinforcing scientific equipment and instruments, computing systems (i.e. research infrastructures);
- Expected economic/technological impact(s): e.g. bringing new products, services, business processes to the market, increasing efficiency, decreasing costs, increasing profits, contributing to standards' setting, etc.
- Expected societal impact(s): e.g. decreasing CO2 emissions, decreasing avoidable mortality, improving policies and decision-making, raising consumer awareness.

⚠ Only include such **outcomes and impacts** where **your project would make a significant and direct contribution**. Avoid describing very tenuous links to wider impacts.

➢ Have in mind the difference in outcomes and impacts between the fundamental research and industrial research which is close to market.
➢ Remind the evaluator of the importance of your research in addressing a challenge/priority at a European/Global level. For example, will your research contribute to:
   o **UN Sustainable Development Goals**
   o **Green Deal,** MSCA Green Charter
   o **Horizon Europe Missions**
➢ Embed your project into those overarching goals – how do they contribute? At a very small scale is perfectly fine. For the SDGs, when you find the applicable SDG(s), you can indicate a specific target inside the mentioned goal. For defining SDGs, feel free to use **JRC KnowSDGs Platform**[8] which can help you to integrate the SDGs into the impact section of your proposal.
➢ Demonstrate that you do not only know about the MSCA, but about the EU strategies.

⚠ Give an indication of the magnitude and importance of the project's contribution to the expected outcomes and impacts, should the project be successful. Provide quantified estimates where possible and meaningful. 'Magnitude' refers to how widespread the outcomes and impacts are likely to be. For example, in terms of the size of the target group, or the proportion of that group, that should benefit over time; 'Importance' refers to the value of those benefits. For example, number of additional healthy life years; efficiency savings in energy supply.

➢ For the illustration of the magnitude and importance of the project contribution to outcomes and impacts you can use a table. For example:

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[7] Monobeneficiary project means that only one organisation (your host organisation) signs the grant agreement with the European Commission/REA, and that this one organisation is responslible for the implemetation of the action (project).

[8] KnowSDGs (Knowledge base for the Sustainable Development Goals) is a web platform that provides tools and organizes knowledge on policies, indicators, methods and data to support the evidence-based implementation of the SDGs.

Expected outcome	Description	Magnitude	Importance	Expected impact

Examples provided in **HE Programme Guide:**

❖ **Example of the outcome:** We would like to create a filtering membrane to treat tap water. At the end of the project, the technology should be used by 10 water treatment plants.

❖ **The expected impact will be:** For companies and water treatment plants, our technology is expected to reduce the costs in the long run (after the initial investment) and the use of chemical product to treat the water. We plan on testing the technology in X region(s) of the EU and this environmentally friendly technology should help to reduce the use of plastic bottles by consumers who would then drink tap water.

❖ **Example on how your results can feed back to policy making and how it contributes to EU priorities:** Water treatment would contribute to higher quality of tap water at a lesser cost with a better taste and the guarantee of a safer product (free of viruses), thereby encouraging citizens to drink tap water instead of bottled water, and reducing the impact on the environment, thereby contributing to the green deal. We will reach out to the local authorities to raise their awareness and get their support. We will implement a mapping of stakeholders at the local governmental level. For that we can rely on indicators as levels of interest in water management but also Go-to-market service from Horizon Results Booster. We will create a white paper to be distributed to regional water authorities from the region of A and B (where we intend to run the tests).

STRENGTHS FROM THE EVALUATION SUMMARY REPORT
1. The impact of the proposal beyond its immediate scope is increased since the envisaged results are highly relevant also for different industries, which are not in the direct focus of the proposal.
2. Beyond the immediate scope, the proposal will establish a long term collaboration between leading labs in Europe and the US and it will significantly advance the development of multimodal optical probes for biomedical applications. There is an excellent long-term impact reasonably to be expected.
3. The proposal's results will, directly and indirectly, impact the research area beyond the immediate scope and duration of the proposal. The quantified estimates of the proposal's contribution to the expected outcomes and impacts are credible.
4. The magnitude of the proposal's contribution is realistically and clearly described with some excellent potential for economic impact and creating new market opportunities. This includes potential plans to start a new consultation service based on the proposal results and experience.5. The proposal is very timely and will have an important scientific and societal impact, given the novelty of the methodological approach and the social relevance of the research questions.

WEAKNESSES FROM THE EVALUATION SUMMARY REPORT
1. The proposal lacks a clear identification of the research contribution to the scientific, societal and economic areas. Moreover, the impact beyond the immediate scope of the proposal is not convincingly presented.

2. No adequate estimate of the scientific medium- and long-term impact of the project is discussed. Also, the impact on other science areas is not very convincing as the link appears very indirect.
3. The researcher does not sufficiently address the expected scientific impact beyond the immediate scope of the proposal and existing connections of model theory to other fields.
4. The broader impact of the project on the scientific community has not been discussed in enough detail.
5. Quantified estimates of the project scientific, societal and economic impact are not provided.

3.   Quality and Efficiency of the Implementation

3.1   *Quality and effectiveness of the work plan, assessment of risks and appropriateness of the effort assigned to work packages*

At a minimum, address the following aspects:
- Brief presentation of the overall structure of the work plan, including deliverables and milestones.
➢ Keep this concise. You do not have space to repeat yourself (1-2 paragraph or bullet points is enough).
➢ Refer to your tasks in the work plane (WP) table.
➢ Describe how the work packages, their timing and the workload make sense.
➢ Explain why the length of the fellowship (the number of person months) is appropriate to complete all the work foreseen in the work packages.
➢ Aim to highlight the strengths and feasibility of the work plan.

- Timing of the different work packages and their components;
➢ There should be at most 6 work packages
➢ **2-3 research work packages only**!
    o These can run sequentially or concurrently and can be interconnected.
    o Ensure they are in line with details provided in research objectives and methodology.
➢ **WP for management**
    o Examples of tasks include meetings with supervisor(s), reporting to the EU (financial and technical reports at end of fellowship).
➢ **WP for training and transfer of knowledge**
    o Tasks/events should match the details in 1.3
➢ **WP for dissemination/exploitation, communication/public engagement**
    o Tasks/events should match the details in 2.2
    o It is important to have specific examples of dissemination & communication activities rather than listing general examples.

➢ There is no need for detailed work plan for the non-academic placement, but it must be mentioned in the Gantt chart and noted, where relevant, in the research work packages

Keep in mind that the MSCA Work programme lists mandatory deliverables for Postdoctoral Fellowships that will have to be submitted for in projects selected for funding:
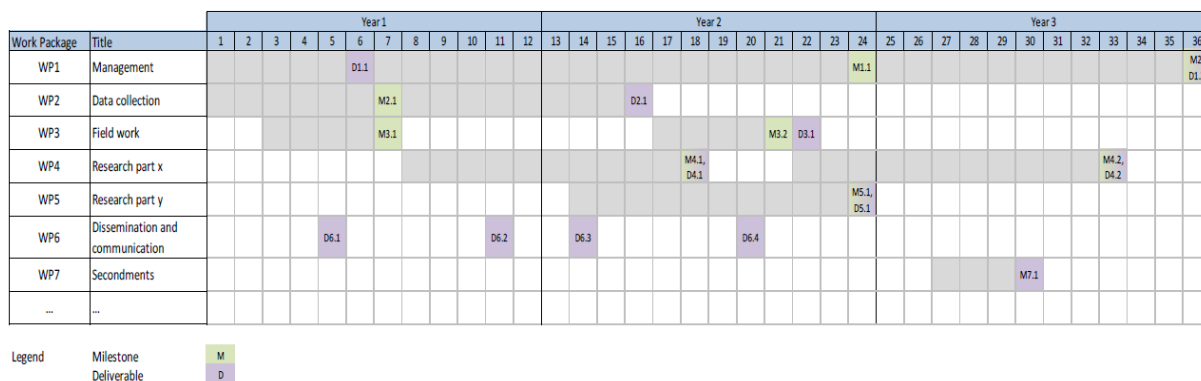
➢ **Mobility declaration** submitted within 20 days of the start of the research training activities and updated (if needed) via the Funding & Tenders Portal Continuous Reporting tool;

➢ **Career development plan** of the recruited researcher, submitted at the beginning of the action (not later than 6 months after its start) and updated if needed throughout the project;

➢ **Evaluation questionnaire** completed by the recruited researcher and submitted at the end of the research training activity; a follow-up questionnaire submitted two years later;

➢ **Data management plan** submitted within the first 6 months of the project;

➢ **Plan for the dissemination and exploitation of results** submitted towards the end of the project.

➢ **Include career development plan, data management plan and plan for the dissemination and exploitation of results in their respective WPs and in the Gantt chart.**

- Mechanisms in place to assess and mitigate risks (of research and/or administrative nature).

➢ Explain how the research, training and career planning will be monitored and how the quality of deliverables will be assured (regular meetings with supervisor and project management support (for example financial department, technology transfer office),

➢ Identify specific risks that could delay the progress of deliverables (delayed start, supervisor leaving the project, equipment failure, insignificant results) & include a contingency measure(s) for each risk plans.

➢ Include both scientific and non-scientific risks.

➢ With the description of risk, include likelihood of each risk (low, medium, high) and connect them with relevant WP.

➢ Note that if no risks and corresponding alternative strategies are mentioned, it is considered a major weakness.

A Gantt chart must be included and should indicate the proposed Work Packages (WP), major deliverables, milestones, secondments, placements. This Gantt chart counts towards the 10-page limit

➢ The inclusion of a Gantt chart is mandatory – example of a Gantt Chart below.

➢ Adapt as needed according to the activities you have proposed in the WPs (3.1).

➢ Remove any columns for a duration longer than that of your proposal.

➢ Add as much detail as needed for your proposal. A Gantt chart includes the following:
  o Work package titles (there should be at least 1 WP);
  o If space allows, you can include the major tasks for each WP.
  o Indication of major deliverables (name them and connect with corresponding WP – D1.1, D1.2…) – don't forget mandatory deliverables.
  o Indication of major milestones (name them and connect with corresponding WP – M1.1, M1.2…),
  o Planning for dissemination, exploitation and communication activities (unless included in a dedicated WP).
  o Secondments, if applicable;
  o Non-academic placement (and its activities), if applicable.

The schedule in the Gantt chart should indicate the number of months elapsed from the start of the action (Month 1).

Example of Gantt chart:

Work Package	Title	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
WP1	Management						D1.1																		M1.1												M2, D1.2
WP2	Data collection						M2.1										D2.1																				
WP3	Field work						M3.1															M3.2	D3.1														
WP4	Research part x																		M4.1, D4.1															M4.2, D4.2			
WP5	Research part y																					M5.1, D5.1															
WP6	Dissemination and communication				D6.1							D6.2		D6.3								D6.4															
WP7	Secondments																														M7.1						
...	...																																				

Legend		
	Milestone	M
	Deliverable	D

STRENGHTS FROM THE EVALUATITON SUMMARY REPORT
1. The work plan is well structured with activities progressing in parallel, rather than being inter-dependent, reassuringly meaning that data should be produced even if one area stalls. This also effectively mitigates risk.   *2. A clear Gantt chart is included and completely consistent with the structure and timings of the workflow, including deliverables, milestones, and secondment.*   *3. Progress monitoring is very well planned, as regular meetings between the researcher and the supervisor are scheduled and regular data reports for the host laboratory/institute.*   *4. The proposal presents good risk management which includes technical and administrative risks and proposes sufficiently effective measures how to mitigate them.*   *5. The effort assigned to work packages including timing and duration of the different work packages is appropriate and credible. The proportion of assigned tasks across the work plan is well balanced and time lines are as expected for this type of research work.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORT
1. Some deliverables and milestones are not sufficiently explained in the proposal.   *2. The administrative and training tasks and activities (e.g. management or dissemination, communication, and exploitation) are too loosely organised in terms of the time and effort needed and not assigned to specific periods in the Gantt chart.*   *3. The workplan lacks sufficient detail. Timescales and person month allocations are unclear e.g., it is hard to determine when specific tasks will be completed.*   *4. The assessment of risks is insufficiently prepared with insufficient reference to risks associated with dissemination, exploitation, and communications, and risks associated with managerial and institutional support.*   *5. The proposal does not adequately provide sufficient detail on time management and the effort assigned to different activities. The way the researcher allocates their time between the different tasks is insufficiently described.*

3.2 Quality and capacity of the host institutions and participating organisations, including hosting arrangements

At a minimum, address the following aspects:

- Hosting arrangements, including integration in the team/institution and support services available to the researcher.

- Describe the research group(s)/environment as a whole (various disciplines, opportunities to collaborate during the fellowship, number of people in the research group, technical support etc.).
- Explain clearly how you will be integrated into this research group(s)/environment and the wider host institution(s) – internal meetings, induction days, social activities, refer back to training courses that are offered etc.
- Include any support from HR services (hosting agreement, work contract, familiarisation with internal procedures) and **EURAXESS service centre** (if applicable) assisting you with reallocation to the host country and research environments.

For Global fellowship:
- Specify the practical arrangements in place to host a researcher coming from another country (visa process etc.).
- Explain the integration into the research team/environment.
- Remember: the researcher can spend first 3 months in European host for preparation (mention this here, if applicable). Incoming phase (return to European host):
- Specify the measures planned for the successful (re)integration of the researcher.

- Quality and capacity of the participating organisations, including infrastructure, logistics and facilities should be outlined in Part B-2 Section 5 ("*Capacity of the Participating Organisations*").
- In short explain that you will have access to research/technical infrastructure (equipment, labs, software, technology, data sources, access to end users), access to administrative infrastructure (staff training resources, library use, access to finance office, research office or your personal working space etc.) that will assure smooth execution of your project
- It is not necessary to explain what the infrastructure is as you don't have space, you will refer to it in B2- Section 5.

Note that for GF, both the quality and capacity of the outgoing Third Country host and the return host should be outlined.

For non-academic placement host:
- Explain the integration into research team/environment, that you will have access to research/technical and administrative infrastructure and dedicated work place.

Associated partners linked to a beneficiary[9]
If applicable, outline here the involvement of any 'associated partners linked to a beneficiary' (in particular, the name of the entity, the type of link with the beneficiary and the tasks to be carried out).

- If your host organisation has an associated partner linked to them where you will spend some part of the research (for example if you are at university but one of the research infrastructures is available on associated Faculty/ Institute) you will need to briefly describe the nature of the association or affiliation and the role of this organisation in your fellowship and the research project.
- Explain what part of research will be conducted within this partner and what infrastructure will be used.

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[9] See the definitions section of the MSCA Work Programme for further information.

STRENGHTS FROM THE EVALUATION SUMMARY REPORT
1. The host institution has a highly experienced administrative support structure that is available to the researcher. The infrastructure and equipment at the host institution and, in particular, the high-performance computers and data storage services made available to the researcher, are highly appropriate to achieve the research objectives.
2. Host institution has a centre for junior scientists with events and training opportunities and networking, effectively facilitating integration scientifically and culturally into the new environment.
3. The hosting arrangements of all the institutions involved (including the non-academic placement host) are of the highest quality. For example, the researcher will benefit from working with very renowned research groups and non-academic partners, expanding their experience and integration into their research and development environments.
4. The host organization shows high-quality capacity, infrastructure, and facilities (e.g., library facilities, human resource, and IT services, and assistance with project management).
5. Both prestigious host institutions and the renowned institution where the secondment would take place suit the planned research project very well, especially with regards to both the scientific environment (which complement each other in this regard) and the infrastructure, as well as with respect to the institutional support provided to the researcher.
WEAKNESSES FROM THE EVALUATION SUMMARY REPORT
1. The administrative support from the host institution (incoming phase) available for the researcher is not described in sufficient detail.
2. The active contribution of the host and secondment institutions in terms of training activities and the integration of the researcher in the research teams are not adequately described
3. Insufficiently detailed information is offered on the infrastructure and equipment at the host institution that will support achieving the research objectives.
4. The proposal does not provide a clear description of non-scientific hosting arrangements involving support services related to accommodation, administration, and integration of the researcher throughout the fellowship
5. The description of overall management structure and the monitoring actions such as meetings with the supervisor lack detail. The integration of the researcher into the research group is not well described.

Part B2 (no overall page limit applied)

4. CV of the researcher (indicative length: 5 pages)

Any information provided in Parts A and B of the proposal should be fully consistent. Always mention full dates (using format: dd/mm/yyyy). The CV should include the standard academic and research record. Any research career gaps and/or unconventional paths should be clearly explained.

➢ Follow the provided template and add other headings if required.
➢ It is important to use the full 5 pages and include all your areas of experience (e.g., teaching, reviewing, consultancy, intersectoral experience, supervision, event organisation, public outreach etc.).
➢ Please note that what you mention here will also be considered by the evaluators in relation to Section 1.4 of Part B1.

At a minimum, the CV should contain:
> a) The name of the researcher;
> b) Professional experience (most recent first, with exact dates in format dd/mm/yyyy);
> c) Education, including PhD award date (most recent first, with exact dates in format: dd/mm/yyyy).

The CV should include information on:

- Publications in peer-reviewed scientific journals, peer-reviewed conference proceedings, and/or monographs (they are expected to be open access either published or through repositories) and other outputs such as data, software, algorithms significant for your research path (they are expected to be open access in appropriate repositories to the extent possible; they should be accompanied by a very short qualitative assessment of their scientific significance and not by the Journal Impact Factor);
- Invited presentations to internationally established conferences and/or international advanced schools;
- Organisation of international conferences, including membership in the steering and/or programme committee;
- Research expeditions led by the researcher;
- Granted patent(s);
- Examples of participation in industrial innovation;
- Prizes and Awards;
- Funding received so far;
- Supervising and mentoring activities;
- Other items of interest.

➢ You must provide a list of achievements reflecting your track record. Your track record is evaluated against other researchers in your career stage, discipline and sector (academic/non-academic):
  o E.g., publications/conference participations, granted patents, monographs, book chapters, examples of leadership in industrial innovation.
➢ If you are not the first or lead author on publications, briefly explain your contribution.

Applicants who have successfully defended their doctoral thesis *before* the call deadline but who have not yet formally been awarded the doctoral degree must clearly indicate the date of the successful PhD defence ("viva"). Researchers having their last thesis defence *after* the call deadline will be automatically declared ineligible for this call.

5. Capacity of the Participating Organisation(s)

Please provide an overview list of all participating organisations (the beneficiary and, where applicable, all associated partners) using template table 5.1 below, and more detailed information for each of the participating organisations (using a separate table for each organisation) using template table 5.2 below.

Any inter-relationship between the participating organisation(s) or individuals and other entities/persons appearing (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, etc.) must be declared in the proposal.

Applicants should provide additional information regarding the administrative/legal relations between the department carrying out the work as described in the table below, and the entity/entities mentioned in Part A of the proposal (i.e. linked to the given Participant Identification Code – PIC).

Should the proposal be shortlisted for funding, all participating organisations will have to be registered with the European Commission's Participant Register Services. Therefore where this information is already known, please provide in Table 5.1 the (draft or validated) nine digit Participant Identification Code (PIC) for the beneficiary and, where applicable, each associated partner.

5.1 Template table: *Overview of Participating Organisations*

Organisation role	PIC	Legal Entity Short Name	Academic organisation (Y/N)	Country	Name of Supervisor
Beneficiary					
Associated partner linked to a beneficiary (if applicable)					
Associated partner for outgoing phase (mandatory for GF)					
Associated partner for secondment (optional)					
Associated partner for non-academic placement (optional)					
Other:					

➢ The word "optional" refers to the fact that the secondment and non-academic placement is optional within the proposal (not a mandatory element of the application). If it is part of the proposal, it needs to be addressed here.

5.2 Template table: *Capacity of the Participating Organisations*

Please complete a separate table for each participating organisation. For the beneficiary, this table should be <u>maximum 1 page in length</u>; for each associated partner, the table should be <u>maximum ½ page in length</u>.

➢ If you are applying for a Global Fellowship you need to have at least 2 tables. One for the beneficiary in MS/AC and another one for the host organisation (associated partner) in third countries. For associated partner you have half a page.

➢ If you have an additional non-academic placement at the end of the fellowship, you also need to have 2 tables. One for the beneficiary in MS/AC and another one for the non-academic partner (associated partner) in MS/AC. For associated partner you have half a page.

➢ If you are applying for a Global Fellowship and you have an additional non-academic placement you need to have 3 tables. One for the beneficiary in MS/AC (1 page) and another one for the host organisation (associated partner) in a third country, and one for the non-academic partner (associated partner) in MS/AC.

➢ If you have secondments in your proposal, additional ½ page table needs to be for secondment host organisation.

Choose one of:
? Beneficiary (compulsory) *? Associated partner linked to a beneficiary (if applicable)* *? Associated partner for outgoing phase (compulsory for GF only)* *? Associated partner for secondment (optional)* *? Associated partner for non-academic placement (optional)*   ➢ You can delete non selected type of organisation.

[Full name + Legal Entity Short Name + Country]	
General description	
Role and profile of supervisor	
Key research facilities, Infrastructure and Equipment	*Demonstrate that the beneficiary has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to the recruited experienced researcher.* *If applicable, indicate the name of the associated partner linked to a beneficiary and describe the nature of the link in the corresponding table.* ➢ List the particular infrastructure and/or equipment available to you and your project, along with the facilities and amenities that

	will be available to you for your training and transfer of knowledge.
Previous and current involvement in EU-funded research and training programmes/actions/projects	*Indicate up to 5 relevant EU, national or international research and training actions/projects in which the institution/department has previously participated and/or is currently participating.*

6.   Additional ethics information

Additional information that could not be included in Part A of the proposal (if needed).

> ➢ If you entered one or more ethical issue/s in the ethical issues table in part A of the proposal, then you must also submit an ethics self-assessment field in part A.
> ➢ Follow the comprehensive information provided in the Template Part B-1.
> ➢ Read research, risk-benefit analyses and ethical issues: **A Guidance Document for Researchers Complying with Requests from the European Commission Ethics Reviews**
> ➢ If no ethics issues are associated with your project, then you should still use this heading and state that the proposal does not pose any ethics issues.
> ➢ More information on ethics issues in Horizon Europe is available in:
> ➢ **REGULATION (EU) 2021/695** - articles 18. and 19.
> ➢ **Work Programme 2021-2022 – General Annexes** – Ethics part starts on page 11.

7.   Additional information on security screening

Additional information on security aspects that could not be included in Part A of the proposal (if needed).

8.   Letter(s) of commitment from associated partners (only for hosts of outgoing phase of Global Fellowships or non-academic placement)

Use this section to add scanned copies of the letter(s) of commitment, if applicable.

Minimum requirements:
- With heading or stamp from the institution;
- Up-to-date document, i.e. not dated prior to the call publication;
- Demonstrating the will to actively participate in the (identified) proposal;
- Explanation of the precise role.

Any additional information the organisation deems useful can be added in the letter.

Note that the expert evaluators will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.

In case the letter fails to provide enough information on the associated partner's role and/or enough assurance of their commitment in the project (e.g. no signature, wrong proposal references, outdated letter…), the experts may penalise the proposal on these aspects under the implementation evaluation criterion.

For GF proposals, and for all proposals requesting a non-academic placement, <u>the absence of a letter of commitment will render the proposal inadmissible and the proposal will not be evaluated.</u>

- ➢ For the non-academic placement, the absence of a letter of commitment will not make the entire proposal ineligible. The proposal will be evaluated without taking into consideration the role, relevance and added-value of the non-academic placement, which might affect the final score.

Suggestions for the letter of commitment:

- ➢ Name the project clearly and demonstrate that the third country host will actively participate in the Global Fellowship. For example:
  "We commit to project XYZ under the MSCA Global Fellowship. We plan to host Dr. X as an experienced researcher for Y months in the period year1 – year 2. Dr. X shall carry out YXABC tasks and research, under the supervision of Dr./Prof. XX, in order to achieve goal(s) ABC", etc.
- ➢ Give the correct date on the letter! It is not recommended to use old letters for former submissions.
- ➢ Even if electronically submitted, a proper scan with a real signature is considered good form. - Someone with authority should sign the letter, as indicated in the template.

Non-binding example of template letter of commitment for PF associated partners:

I undersigned *[title, first name and surname]*, in my quality of *[role in the organisation]* in *[name of the organisation]* commit to set up all necessary provisions to participate as associated partner in the proposal *[proposal number and/or acronym]* submitted to the call HE-MSCA-PF-2022, should the proposal be funded.

On behalf of *[name of the organisation]*, I also confirm that we will participate and contribute to the research, innovation and training activities as planned in this project. In particular, *[name of the organisation]* will be involved in [*free field for any additional information that the participating organisation wishes to indicate in order to describe its role and contribution to the project]*.

I hereby declare that I am entitled to commit into this process the entity I represent.

Name, Date, Signature