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theoria poiesis praxis

research

# MSCA- Opportunities for Researchers

**Research Support Office**

Vice-Rectorate for Research and Doctoral School

University of Aveiro

June 2017

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universidade  
de aveiro  
gabinete de apoio  
à investigação



## Horizon 2020

### Excellent Science

European Research Council (ERC)

Future Emerging Technologies (FET)

Marie Skłodowska Curie Actions (MSCA)

European Research Infrastructures

### Industrial Leadership

Enabling and Industrial Technologies

Access to Risk Finance

Innovation in SMEs

### Societal Challenges

Health, Demographic Change and Wellbeing

Food Security, Sustainable Agriculture, etc.

Secure, Clean and Efficient Energy

Smart, Green and Integrated Transport

Climate Action, Resource Efficiency and Raw Materials

Inclusive, Innovative and Reflective Societies

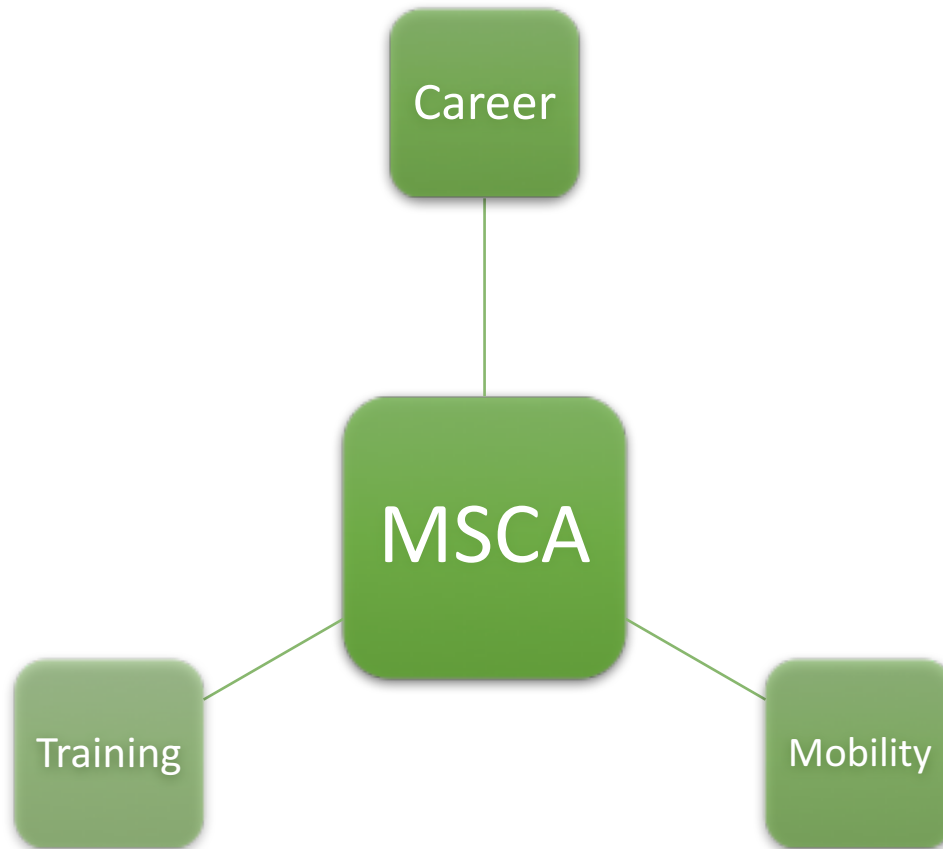
Secure Societies

Opportunities for training and career development

European Institute of Innovation & Technology (EIT) • Joint Research Centre (JRC)  
• Spreading Excellence and Widening Participation • Science with and for Society



## MSCA – General Features



## MSCA – General Features

- Ensure excellent and innovative research training as well as attractive career and knowledge-exchange opportunities through **cross-border and cross-sector mobility** of researchers/innovation staff
- Open to **all domains** of research and innovation /from basic to applied research (bottom-up approach)
- Open to researchers/innovation staff at **all career stages**
- Open to universities, Research institutions, Research infrastructures, businesses, other socio-economic actors
- Open to MS and third countries

## MSCA – General Features

- ➔ Aim: develop new knowledge / enhance skills of people behind research and innovation
- ➔ Operate in a 'bottom-up' basis , covering all scientific domains
- ➔ Level of involvement is proportional to the participant's needs
- ➔ Strong accent on participation of industry, SMEs and non-academia overall



## MSCA – 4 Types

ITN - Innovative Training Networks	<p>Support for doctoral and early-stage training European Training Networks (ETN), European Industrial Doctorates (EID), European Joint Doctorates (EJD)</p> <p><i>Indicative dates 12 Oct 2017 – 17 jan 2018</i></p>
IF- Individual Fellowships	<p>Support for experienced researchers undertaking international and inter-sector mobility: European Fellowships and Global Fellowships Dedicated support for career restart and reintegration</p> <p><b>Deadline -14 September 2017</b></p> <p><i>Indicative dates 12 Apr 2018 – 12 set 2018</i></p>
RISE - Research and Innovation Staff Exchange	<p>International and inter-sector cooperation through the exchange of staff</p> <p><i>Indicative dates 22 nov 2017 – 21 mar 2018</i></p>
COFUND - Co-funding of regional, national and international programmes	<ul style="list-style-type: none"> <li>- Doctoral programmes</li> <li>- Fellowship programmes</li> </ul> <p><i>Indicative dates 12 apr 2017 – 27 sept 2018</i></p>

Host-driven!

Individual-driven!

Host-driven!

Institutional  
(strategic, only  
50% funding)





## MSCA - Innovative Training Network ( ITN)



aim to **train a new generation of creative, entrepreneurial and innovative ESR\***, able to face current and future challenges and **to convert knowledge and ideas into products and services for economic and social benefit.**

- ➡ Competitively selected joint research training/doctoral programmes implemented by partnerships of academic and non-academic from different countries across Europe and beyond
- ➡ Focus on advancing scientific/ technological knowledge through research on individual projects
- ➡ Individual research project are carried out under supervision by ESR that are recruited to the network.



## MSCA - Innovative Training Network ( ITN)

- ➔ **Not a research project NOR a training programme** - it is a combination of both – advancing in the area of research whilst at the same time training early stage researchers (ESR)
- ➔ ESRs may register on a PhD programme ( key → transferable skills training for ESRs in addition to standard PhD training)
- ➔ Inclusion of non academic sector
- ➔ Triple I : International , Interdisciplinary and Intersectoral



## MSCA – ITN – Expected Impact

### @researcher level

- **Increased set of skills, both research-related and transferable ones, leading to improved employability and career prospects both in and outside academia** (leading in the longer-term to more successful careers)
- **Increase in higher impact R&I output and more knowledge and ideas converted into products and services**
- **Greater contribution to the knowledge-based economy and society**

## MSCA – ITN – Expected Impact

### @organisation level

- **Enhanced cooperation and better transfer of knowledge between sectors and disciplines**
- Improvement in the **quality of training programmes** and supervision arrangements
- Creation of **new networks and enhanced quality of existing ones**
- **Boosting R&I capacity** among participating organisations
- **Increased internationalisation** of participating organisations

## MSCA – ITN – Expected Impact

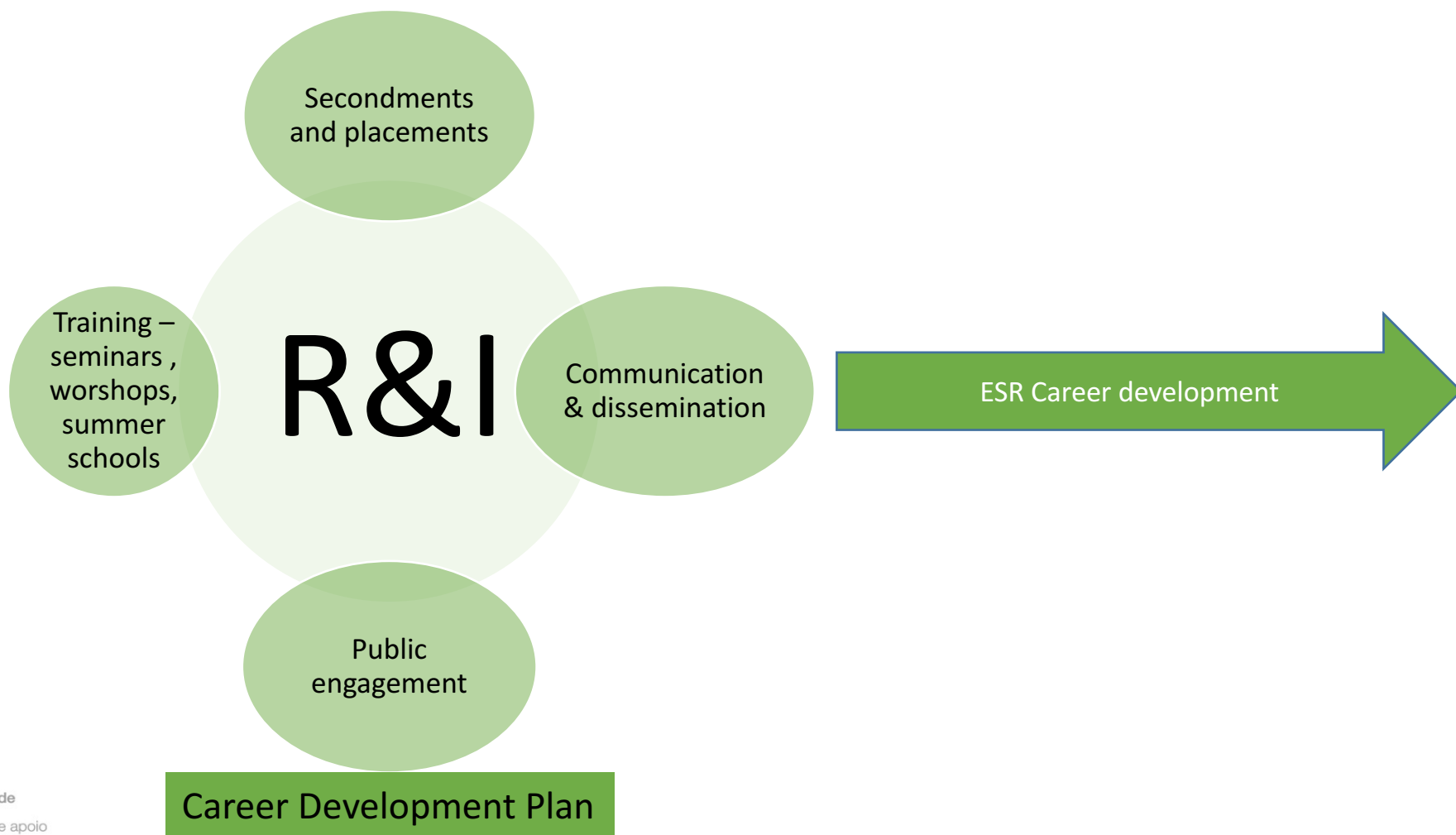
### @system level

- Increase in **international, interdisciplinary and intersectoral mobility** of researchers in Europe
- **More structured and innovative doctoral training**, enhanced **implementation of the European Charter and Code and the EU Principles for Innovative Doctoral Training**
- Stronger links between the European Research Area (ERA) and the European Higher Education Area (EHEA), notably through supporting the knowledge triangle between research, innovation and education
- **Improvement in the working and employment conditions** for doctoral candidates in Europe
- **Increased societal and economic relevance** of European higher education
- **Strengthening Europe's human capital base in R&I** with a new generation of more entrepreneurial and highly-skilled early career researchers
- **Increase in Europe's attractiveness as a leading research destination**, accompanied by a rise in the numbers of talented researchers attracted and retained from abroad
- **Better quality research and innovation** contributing to Europe's **competitiveness and growth**



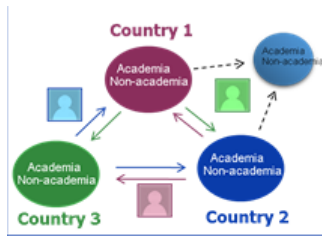


## MSCA - Innovative Training Network ( ITN) – Typical Activities



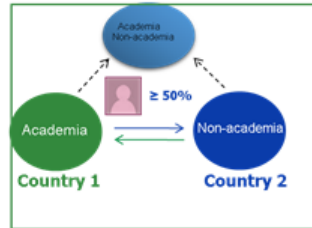
# MSCA - Innovative Training Network ( ITN) – 3 types

## European Training Networks



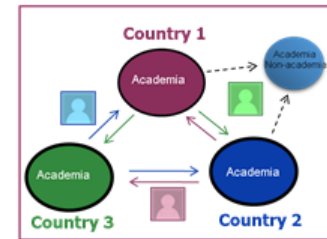
- Network aimed at training highly-skilled researchers and stimulating entrepreneurship, creativity and innovation
- At least 3 beneficiaries from at least 3 different MS or AC
- 6 to 10 beneficiaries, different sectors
- All beneficiaries must recruit and host at least 1 researcher (ESR)
- Joint supervision encouraged
- ESR contract 3-36 months

## European Industrial Doctorates



- Minimum 1 academic and 1 non academic beneficiary from MS or AC
- Obligatory non academic beneficiary ( usually industry)
- ESRs contracts are for 36 months and must be enrolled on PhD at the academic beneficiary
- ESRs must spend at least 50% of their time in the non academic sector
- Mandatory joint selection, training and supervision of ESRs

## European Joint Doctorates



- minimum of 3 academic organisations
- aim of delivering joint, double or multiple degrees.
- Joint supervision of the research fellow and a joint governance structure are mandatory.
- ESR contracts are 36 months



# MSCA – ITN - Award Criteria

ITN: Marie Skłodowska-Curie Innovative Training Networks		
Excellence	Impact	Quality and efficiency of the implementation
Quality, innovative aspects and credibility of the research programme (including intermultidisciplinary, intersectoral and, where appropriate, gender aspects)	Enhancing the career prospects and employability of researchers and contribution to their skills development	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources, (including awarding of the doctoral degrees for EID and EJD projects)
Quality and innovative aspects of the training programme (including transferable skills, intermultidisciplinary, intersectoral and, where appropriate, gender aspects)	Contribution to structuring doctoral / early-stage research training at the European level and to strengthening European innovation capacity, including the potential for:  a) meaningful contribution of the non-academic sector to the doctoral/research training, as appropriate to the implementation mode and research field  b) developing sustainable joint doctoral degree structures (for EJD projects only)	Appropriateness of the management structures and procedures, including quality management and risk management (with a mandatory joint governing structure for EID and EJD projects)
Quality of the supervision (including mandatory joint supervision for EID and EJD projects)	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the infrastructure of the participating organisations
Quality of the proposed interaction between the participating organisations	Quality of the proposed measures to communicate the project activities to different target audiences	Competences, experience and complementarity of the participating organisations and their commitment to the programme
50%	30%	20%
Weighting		
1	2	3
Priority in case of ex aequo		

Threshold applies – 70 %



## MSCA – IF - Objectives & Opportunities

- to enhance the **creative and innovative potential of experienced researchers to diversify their individual competence in terms of skill acquisition through advanced training, international and intersectoral mobility**
- to acquire and transfer new knowledge and to work on research and innovation in a European context (EU Member States and Associated Countries) or outside Europe
- supports the return and reintegration of researchers from outside Europe who have previously worked here
- develops or helps to restart the careers of individual researchers that show great potential, considering their experience

## MSCA – IF – Expected Impact

### @researcher level

- Increased set of skills, both research-related and transferable ones, leading to improved employability and career prospects both in and outside academia
- Increase in higher impact R&I output, more knowledge and ideas converted into products and services
- Greater contribution to the knowledge-based economy and society

## MSCA – IF – Expected Impact

### @organisation level

- Enhanced cooperation and stronger networks
- Better transfer of knowledge between sectors and disciplines
- Boosting of R&I capacity among participating organisations

## MSCA – IF – Expected Impact

### @system level

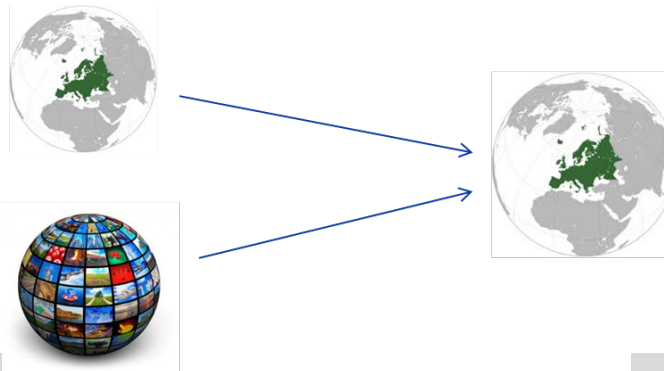
- Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe
- Strengthening of Europe's human capital base in R&I with more entrepreneurial and better trained researchers
- Better communication of R&I results to society
- Increase in Europe's attractiveness as a leading destination for R&I
- Better quality research and innovation contributing to Europe's competitiveness and growth

## MSCA – IF – 2 types of Grants

### European Fellowships

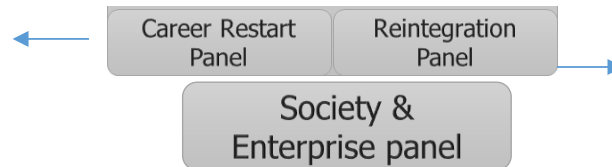
1 – 2 years

open to researchers either coming to Europe from any country in the world or moving within Europe. The researcher must comply with the rules of mobility in the country where the European Fellowship is held



researchers must have been active in research for at least 12 months immediately prior to the deadline for submission.

12-36 months



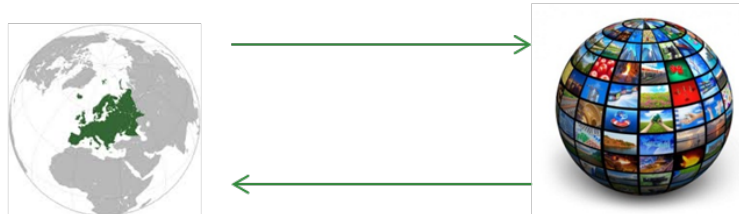
Return and reintegration of researchers into a longer term research position in Europe, including in their country of origin there shall be mobility into Europe

Researchers seeking to work on research and innovation projects in an organisation from the non-academic sector will be supported via a separate multi-disciplinary society and enterprise panel

## MSCA – IF

### Global Fellowships

based on a secondment to a third country and a mandatory 12 month return period to a European host. The researcher must comply with the rules of mobility in the country where the Global Fellowship secondment takes place, not for the country of the return phase.



⇒

24-36 months (12-24 months for outgoing phase+ 12 month return phase in Europe)



In the main, cannot apply for a fellowship in a country where you have lived for **>12 months** in the **3 years** before the Call deadline

### Currently studying in PT?

- European Fellowship: must apply with host outside PT (i.e. move country)
- Global Fellowship: rule applies to country outside Europe, so can apply to come back to PT host (or anywhere else in Europe). If you're not European, must have lived in Europe for 5 years before applying for GF.

### Recently moved to PT?

- Could apply for EF with current host, and GF if you've been in Europe for  $\geq 5$  years before applying

## Who applies?

Individual with organisation



**IF**

Individual Fellowships

## MSCA – IF - Secondments

Duration of IF project	Max. secondment duration
≤18 months	3 months
>18 months	6 months

- Highly recommended as a tool for knowledge transfer and training opportunity
- Must take place in MS/AC (but shorter visits to Third Countries eligible)
- Can be split into shorter periods
- Expected to take place in a different sector (non-academic/academic)

## MSCA : IF – Thinking in applying? Some advice...

### Prospective Fellow

#### STEP 1:

**Find a host organisation** (University, research institute, SME, other company...) **and a supervisor**

(2 of each for Global Fellowship)

Look for ads on EURAXESS

Then:

- Ask your supervisor for recommendations
- Write the application together
- Submit application together
- Use the University's support offices!

( strategic advise, official information,  
editing of the proposal, IPR issues , etc)

### Prospective Supervisor

#### STEP 1:

**Find the best candidate!**

Look for CV's on EURAXESS

Networking on conferences

Then:

- Ask research collaborators for recommendations
- Write the application together
- Submit application together
- Use the University's support offices!

( strategic advise, official information,  
editing of the proposal, IPR issues, etc)



## MSCA – IF - Award Criteria

IF: Marie Skłodowska-Curie Individual Fellowships		
Excellence	Impact	Quality and efficiency of the implementation
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the future career prospects of the researcher after the fellowship	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the management structure and procedures, including risk management
Quality of the supervision and of the integration in the team/institution	Quality of the proposed measures to communicate the project activities to different target audiences	Appropriateness of the institutional environment (infrastructure)
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship		
50%	30%	20%
Weighting		
1	2	3
Priority in case of ex aequo		

**Threshold applies – 70 %**

## MSCA - RISE - Research and Innovation Staff Exchange

- ➔ Promote international and inter-sector collaboration through research and innovation staff exchanges
- ➔ Organizations from **academic and non-academic sectors**, based in MS and AC and outside Europe (third countries)
- ➔ Exchanges of both ESR and ER, as well as administrative, managerial and technical staff supporting the research and innovation activities of the proposal
- ➔ Common research and innovation project (proposals should highlight **networking opportunities, sharing of knowledge** and the **skills development** of staff members)
- ➔ Highly skilled research and innovation staff
- ➔ **at least three partners from 3 different countries** (universities, research institutions, or non-academic organisations. Small and medium-sized enterprises (SMEs) are encouraged to participate.)
- ➔ secondment of staff members for **one month to one year**. Funding for a RISE project can last up to **four years**.



## MSCA – RISE – Expected Impact

### @staff level

- Increased set of skills, both research-related and transferable ones, leading to improved employability and career prospects both in and outside academia
- Increase in higher impact R&I output, more knowledge and ideas converted into products and services
- Greater contribution to the knowledge-based economy and society



## MSCA – IF – Expected Impact

### @organisation level

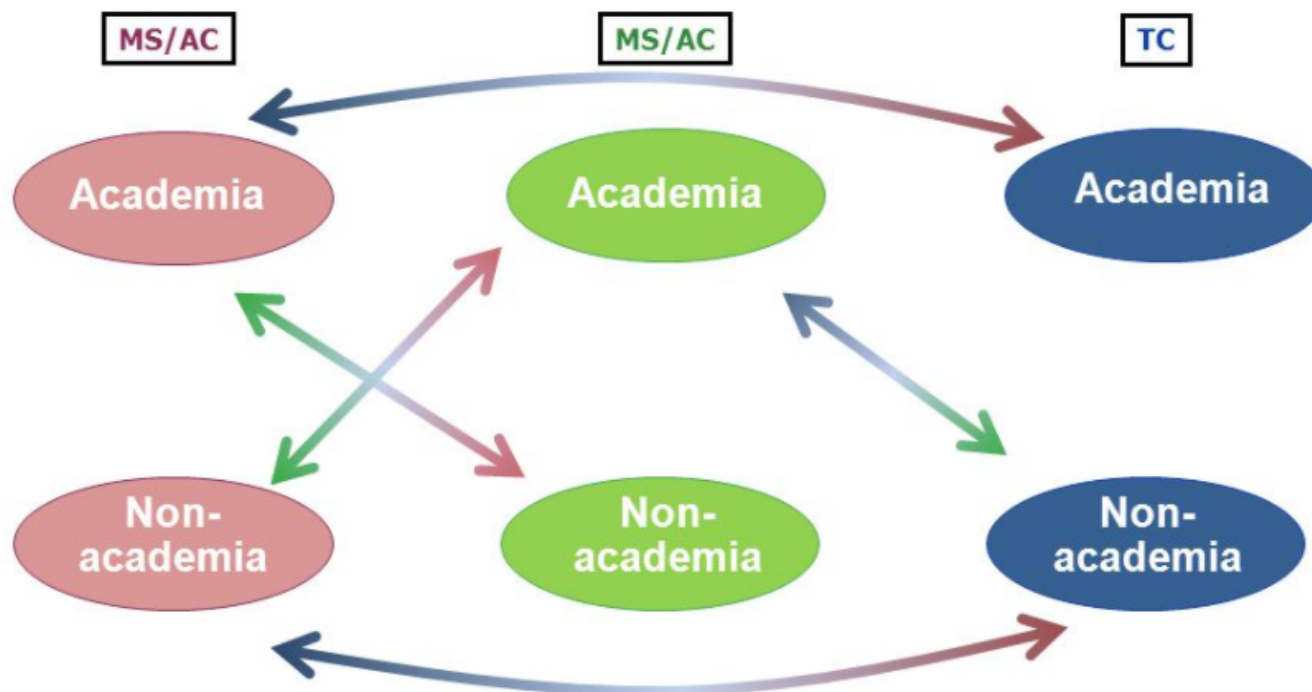
- Enhanced cooperation and transfer of knowledge between sectors and disciplines
- Strengthening of international and intersectoral collaborative networks
- Boosting of R&I capacity among participating organisations

## MSCA – IF – Expected Impact

### @system level

- Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe
- Strengthening of Europe's human capital base in R&I
- Increase in Europe's attractiveness as a leading destination for R&I
- Better quality R&I contributing to Europe's competitiveness and growth

## MSCA - RISE - Exchanges



Secondment duration – 1-12 months  
Action duration – 48 months from starting date



## MSCA – RISE - Award Criteria

RISE: Marie Skłodowska-Curie Research and Innovation Staff Exchange		
Excellence	Impact	Quality and efficiency of the implementation
Quality and credibility of the research/Innovation project; level of novelty and appropriate consideration of Inter/multidisciplinary, Intersectoral and gender aspects	Enhancing the potential and future career prospects of the staff members	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Quality and appropriateness of knowledge sharing among the participating organisations in light of the research and innovation objectives.	Developing new and lasting research collaborations, achieving transfer of knowledge between participating organisations and contribution to improving research and innovation potential at the European and global levels	Appropriateness of the management structures and procedures, including quality management and risk management
Quality of the proposed interaction between the participating organisations	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the institutional environment (hosting arrangements, infrastructure)
	Quality of the proposed measures to communicate the project activities to different target audiences	Competences, experience and complementarity of the participating organisations and their commitment to the project
50%	30%	20%
Weighting		
1	2	3
Priority in case of ex aequo		

**Threshold applies – 70 %**



## MSCA : RISE – Example of project

### An example of a RISE project<sup>1</sup>

*RISE offers appropriate funding for secondments of staff members including funding for research, innovation, training and networking activities.*

*Based upon previous experiences, a typical project could last 48 months and involve, on average 4-7 organisations from the academic and/or non-academic sector (in particular SMEs) from MS/AC and TC which contribute directly to the implementation of the joint research and innovation activities by seconding and/or hosting eligible staff members. Depending on the size of the partnership and the nature of the research and innovation project that is jointly implemented, between 200 and 400 person months for secondments (with a maximum of 540 person months) could be envisaged in order to allow for a significant and sustainable impact of the RISE project. Appropriate supervision and support is provided to staff members during their period of secondment by the host organisation.*

*The sustainability of the research and innovation project will be reinforced through joint activities to which the project participants as a whole or part would participate. Within the framework of a RISE project, the consortium is therefore expected to implement the research/innovation activities by means of functional secondments and organising/taking part in training courses, workshops, summer schools, seminars, conferences etc. aimed at sharing knowledge, acquiring new skills and developing careers for consortium staff members.*

*Regular meetings (at least once per year) will be the backbone for the planning and the implementation of the research and innovation project. The compulsory mid-term review meeting after the first year will allow for the provision of direct feedback from the Research Executive Agency (REA) Project Officer.*

*Proposals should consider these elements and provide a convincing concept and work plan going beyond the simple scheduling of staff secondments.*

3 proposals approved ( last call)  
2 coordinations





## MSCA Budget & Funding Issues

Unit costs expressed in person-months → Automatic calculation –  
Easy budgeting!



Marie Skłodowska-Curie Action	Researcher unit cost person/month			Institutional unit cost person/month	
	Living allowance*	Mobility allowance	Family allowance	Research, training and networking costs	Management and indirect costs
Innovative Training Networks	3270	600	500	1 800	1 200
Individual Fellowships	4880	600	500	800	650
Marie Skłodowska-Curie Action	Staff member unit cost Top-up allowance person/month			Institutional unit cost person/month	
				Research, training and networking costs	Management and indirect costs
Research and Innovation Staff Exchange	2 100			1 800	700

\* A country correction coefficient applies to the living allowance. This coefficient is the one applicable to the country of the beneficiary, as listed in Table 2. The only exception are IF Global Fellowships with two different country correction coefficients:

- for the outgoing phase: the coefficient of the country where the researcher is hosted (i.e. the country of the partner organisation)
- for the return phase: the coefficient of the country where the researcher returns to (i.e. the country of the beneficiary).





## MSCA Budget & Funding Issues

Marie Skłodowska-Curie Action	Staff member unit cost [per person-month of secondment] [EUR]	Institutional unit cost [per person-month of secondment]	
		Research, training and networking costs [EUR]	Management and indirect costs [EUR]
RISE	2,000	1,800	700

- Staff-member unit cost – support to travel, accommodation and subsistence costs for the staff during the secondment : the salary is not covered-beneficiaries and partner organizations are expected to continue paying staff's salary during their stay abroad
- Research, training and networking costs- cover consumables, laboratory costs, participation of conferences, workshops, seminars, coordination and review meetings and networking activities



## MSCA – Documents and useful links

[http://ec.europa.eu/research/participants/data/ref/h2020/other/guides\\_for\\_applicants/h2020-guide-appl-msca-if\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-if_en.pdf)

[http://ec.europa.eu/research/participants/data/ref/h2020/call\\_ptef/ef/2016-2017/h2020-call-ef-msca-if-2016-17\\_en.pdf](http://ec.europa.eu/research/participants/data/ref/h2020/call_ptef/ef/2016-2017/h2020-call-ef-msca-if-2016-17_en.pdf)

# Thank You & Contact Us!!!

**Vice-Rector for Research and Doctoral School**

**Prof. Dr. José Fernando Mendes** - [jfmendes@ua.pt](mailto:jfmendes@ua.pt)

**Luísa Fernandes Sal** - [luisa.fernandes@ua.pt](mailto:luisa.fernandes@ua.pt)  
Phone: (+351) 234370848, ext. 52113  
Fax: (+351) 234370089

**Tatiana Lima Costa** - [tatiana.costa@ua.pt](mailto:tatiana.costa@ua.pt)  
Phone: (+351) 234247190, ext. 22016  
Fax: (+351) 234370089

**Vera Fernandes** - [verafernandes@ua.pt](mailto:verafernandes@ua.pt)  
Phone: (+351) 234401571, ext. 22098  
Fax: (+351) 234370089





## MSCA – Application – Participant’s Portal

Type of Action	<a href="#">Career Restart panel [MSCA-IF-EF-CAR]</a>	<a href="#">START SUBMISSION</a>
Topic	Individual Fellowships - MSCA-IF-2017	

Type of Action	<a href="#">Reintegration panel [MSCA-IF-EF-RI]</a>	<a href="#">START SUBMISSION</a>
Topic	Individual Fellowships - MSCA-IF-2017	

Type of Action	<a href="#">Society and Enterprise panel [MSCA-IF-EF-SE]</a>	<a href="#">START SUBMISSION</a>
Topic	Individual Fellowships - MSCA-IF-2017	

Type of Action	<a href="#">Standard EF [MSCA-IF-EF-ST]</a>	<a href="#">START SUBMISSION</a>
Topic	Individual Fellowships - MSCA-IF-2017	

Type of Action	<a href="#">Global Fellowships [MSCA-IF-GF]</a>	<a href="#">START SUBMISSION</a>
Topic	Individual Fellowships - MSCA-IF-2017	

[registration to Participant Portal](#) needed!

## MSCA – Application

- on an application made jointly by the researcher and the beneficiary in the academic or non-academic sectors (host)
- the host organisation, is represented by the supervisor
- submission falls under the responsibility of the supervisor
- Apply to specific discipline panel
- Host organisation ('Supervisor' or other 'Contact') or the Fellow registers the draft proposal
  - PIC code
  - Draft acronym, draft summary, choice of panel
- Supervisor, other Contact or Fellow give each other access onto the proposal
- Proposal should be submitted by the Supervisor
  - Submission system checks ('Validate forms' and 'Print preview')
  - 'Submit' as many times as required until the deadline

## MSCA – Application

A **Career Development Plan** should be established jointly by the supervisor(s) and the researcher. In addition to research or innovation objectives, this plan comprises the **researcher's training and career needs, including training on transferable skills, planning for publications and participation in conferences.**



# MSCA- IF- Proposal

## → Administrative Proposal Submission form

Information on PI, host institution, budget  
including Ethics Review Table  
Filled on line

## → The Research Proposal, Parts B1

uploaded and submitted PDF files

is the part of the Proposal which contains the details of the proposed research and training programme along with the practical arrangements planned to implement them

The minimum font size allowed is 11 points. The page size is A4 (with single line spacing). Side margins should be at least 20 mm and the bottom and top margins at least 15 mm

For the Gantt Chart and any Tables, the minimum font size is 8 points. Literature references should be listed in footnotes, font size 8 or 9. All footnotes will count towards the page limit.



# MSCA- IF- Proposal

In drafting PART B of the proposal, applicants must follow the structure outlined below.

## LIST OF PARTICIPANTS

START PAGE COUNT

1. EXCELLENCE
2. IMPACT
3. IMPLEMENTATION

10 pages

STOP PAGE COUNT

4. CV OF THE EXPERIENCED RESEARCHER (max 5 pages)
5. CAPACITIES OF THE PARTICIPATING ORGANISATIONS
6. ETHICAL ASPECTS

+ Letters of commitment of partner organisations (GF only)



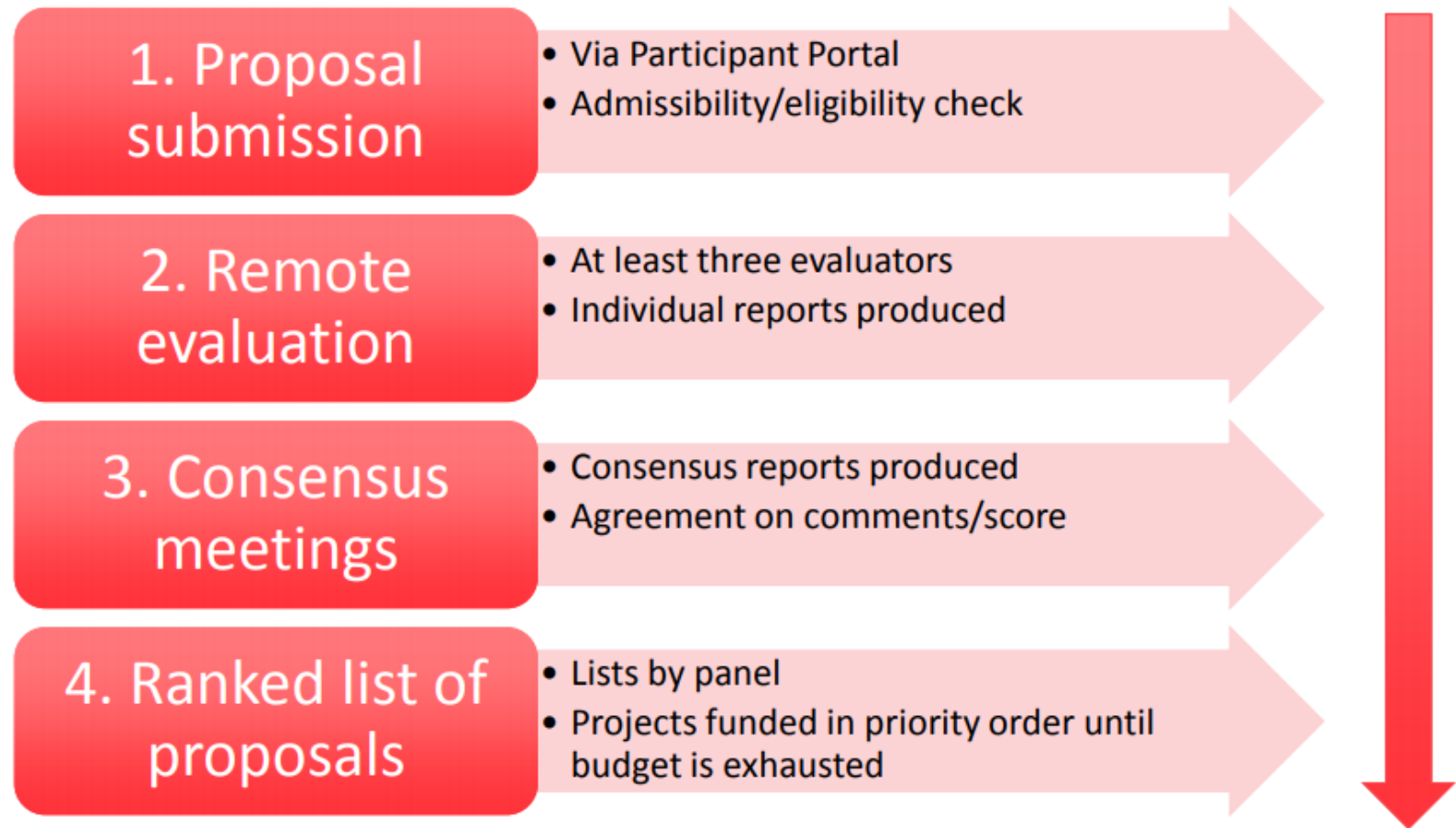
# MSCA- IF- Proposal

## Responsible Research and Innovation

- **Open science** (obligation)
- **Gender** (always mention in proposal)
- **Ethics** (always consider in proposal)
- **Public engagement** (iterative and inclusive participatory multi-actor dialogues)
- **Science education**
- **Outreach and communication**



# MSCA- IF- Evaluation Process



# MSCA- IF- Evaluation - Panels

## Evaluation panels

- Chemistry (CHE)
- Social Sciences and Humanities (SOC)
- Economic Sciences (ECO)
- Information Science and Engineering (ENG)
- Environment and Geosciences (ENV)
- Life Sciences (LIF)
- Mathematics (MAT)
- Physics (PHY)

## Additional multidisciplinary panel for IFs

- Career Re-start Panel
- Reintegration Panel
- Enterprise and Society Panel

## MSCA- IF- Evaluation - Scoring

Excellence  
(50%)

Impact  
(30%)

Implementation  
(20%)

- Evaluation scores awarded for each criterion from 0 to 5
- Each award criterion has a weighting
- Total score is subject to a threshold of 70% - competitive proposals need to aim at a score of 90+%
- Evaluation summary reports provided as feedback to applicants along with score and funding decision
- No restrictions on re-application, but applicants discouraged from making references to previous evaluation results