



# Welcome to the webinar "How to write a successful MSC-IF proposal"

At the moment, you cannot hear anything

We will start the webinar at 2 pm CET sharp







## Table of contents

- General Information on MSCA Individual Fellowships (IF) Call 2018
- 2. Application procedure
- 3. Documents, submission and Scheduling
- 4. Writing IF-Proposal: Part B
- 5. General hints





# General Information IF Call 2018

- Budget: EUR 273 m: EF = 220 M; GF = 45 M; SE panel = 8 M
- Research areas: No pre-defined research topics (»bottom-up«)
- <u>Eligible</u>: Experienced Researchers (ERs):
  - doctoral degree (95% of the applicants) or
  - at the Call deadline (12.09.2018), at least 4 years research experience (full-time equivalent) after graduation
- <u>Working conditions</u>: Generally **full-time employment contract** including **social security no scholarships**
- <u>Application</u>: researcher together with the chosen supervisor at the chosen host institution in Germany

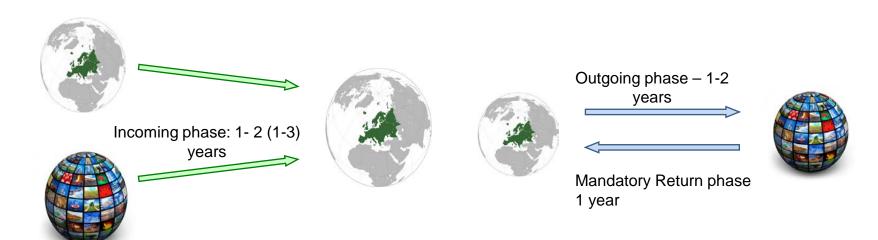




# IF programme lines: an overview

#### **European Fellowships**

### **Global Fellowships**



8 scientific panels (1 - 2 years)

3 multidisciplinary sub-panels:

Reintegration Panel (RI) (1 - 2 years)Society & Enterprise Panel (SE) (1 - 2 years)Career Restart Panel (CAR) (1 - 3 years)







# European Fellowships (EF)

Career development of experienced researchers

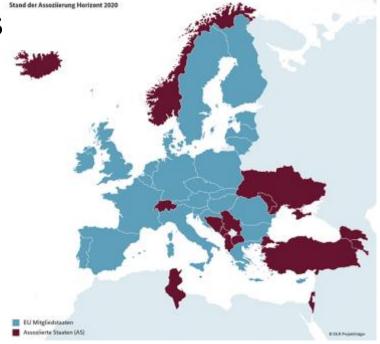




# **EF: Participating Countries**

# **Eligible countries:**

- EU Member States (MS)
- Associated Countries (AC)



## **General Mobility Rule**

Researchers **must not** have resided or carried out their main activity in the country of their host organization for more than **12 months in the previous 3 years** before the call deadline (12.09.2018)





# Standard European Fellowship

- 1 to 2-year research stay in Europe (MS/AC)
- Experienced researchers of any nationality
   (→ mobility rule)
- Host institution: must be active in Research & Development, e.g. University, Research Organization, Company (incl. SMEs), NGO, ...
- Submission and evaluation in eight scientific panels: CHE, SOC, ECO, ENG, ENV, LIF, MAT, PHY





# European Fellowships: Career Restart Panel (CAR)

- Assistance in resuming a scientific career after a break: (e.g. illness, parental leave, working outside research)
  - Researchers of any nationality are eligible:
     not have been active in research for at least 12 consecutive months in the 18 months prior to the call deadline (13.3.2017-12.9.2018)
  - Modified mobility rule: Researchers must not have resided or carried out their main activity in the country of their host organisation for more than 3 years in the 5 years immediately before the call deadline





# European Fellowships: Reintegration Panel (RI)

- Assistance in returning to Europe from a Third Country:
  - Researchers with MS/AC nationality or MS/AC long-term residence (at least 5 consecutive years)
     Periods of absence for long-term residents: no longer than 10 months in the 5 years. No longer than 6 consecutive months for one period. Altogether no longer than 10 months!
  - The researcher must move or have moved <u>directly</u> from a
     TC to the MS or AC where the host organisation is located
  - Modified mobility rule: Researchers must not have resided or carried out their main activity in the country of their host organisation for more than 3 years in the 5 years immediately before the call deadline





# European Fellowship: Society and Enterprise Panel (SE)

- Assistance in conducting research in the non-academic sector
  - Host institution must be located in a MS/AC and be a non-academic institution (e.g. industry, business, NGO etc.)
  - Modified mobility rule: the researcher must not have resided and/or carried out his/her main activity for more than 3 years in the 5 years immediately before the call deadline
  - Applicants may be of any nationality







# Global Fellowships (GF)

Career Development outside of Europe





# Global Fellowships

- One to two-year research stay outside of Europe
   (→ mobility rule),
   mandatory one-year return phase in Europe (MS/AC)
- Experienced researchers with MS/AC nationality or MS/AC long-term residence (at least five consecutive years)
- Two host institutions
  - in a third country (partner organisation)
  - in MS/AC (return phase),
     contractual partner of the EU (employer for the whole time)
- Submission and evaluation in eight scientific panels: CHE, SOC, ECO, ENG, ENV, LIF, MAT, PHY





# Individual Fellowships – Secondments

- Optional secondment phase in MS/AC, preferably intersectoral
- Dividable into several shorter stays
- Significant contribution to the fellowship's impact
- To be justified in the proposal

**Secondment duration** 

≤ 18 month

≤ 3 month

> 18 month

≤ 6 month





# Individual Fellowships - Funding

- Only unit costs
- Living Allowance is multiplied by correction coefficient of the host country (DE: 97.0%)
- Allowances are employer's gross amounts\*

Researcher unit costs [person/month]			Institutional unit costs [person/month]	
Living Allowance*	Mobility Allowance	Family Allowance	Research, Training and Networking	Management and Overheads
4.880€	600€	500€	800€	650€





# Financing Example Incoming EF for Germany

A researcher without family obligations applies for a 12-month fellowship at a German university or research institution

Term	Calculation	Contribution	
Living Allowance CCC*	12*4.880 €= 58.560 € 97.0 %	56.803 €	
<b>Mobility Allowance</b>	12*600	7.200 €	
Employer's gross amo	64.003 €		
Institutional Unit Costs	12*800 + 12*650	17.400 €	
Maximum EC Contribu	81.403 €		

<sup>\*</sup> correction coefficient of the host country





# Success rates IF Call 2017

	Submitted	Evaluated	Selected for funding	Success rate in %
Standard-EF	7.154	7.065	1.029	14,6
EF-CAR	329	322	46	14,3
EF-RI	539	533	78	14,6
EF-SE	209	204	58	28,4
GF	858	833	137	16,4
Altogether	9.089	8.957	1.348	14,8





# Application procedure

- Call for applications once a year, dates can be found in the MSCA Work Programme 2018/20
- Time frame for application

 $\rightarrow$  12.04.2018 - 12.09.2018

Closing date: 12 September 2018, 5 p.m. (Brussels local time)

- Participant portal <a href="http://ec.europa.eu/research/participants/portal">http://ec.europa.eu/research/participants/portal</a>
   Call, documents (Work Programme, Guide for Applicants), proposal template, submission system (electronically)
- A personal EU Login account is required





# Submission and Scheduling

- Proposals are submitted in a single stage and evaluated in one step
- Evaluation: max. 5 months (results: 13 February 2019 at the latest)
- Preparation: max. 3 months to sign the grant agreement

Earliest possible starting date: beginning of the following month after signing the grant agreement

Latest possible starting date: 12 months after signing the grant agreement (exceptions are possible)





# The proposal

Parts of the proposal:

Part A: Administrative Data

Part B: proposal text





## **Documents**

#### Part A

- 1. General information (about proposal, including the abstract)
- 2. Administrative data of participating organisations
- 3. Budget
- 4. Ethics
- 5. Call specific questions





## **Documents**

Part B – Document 1 (to be uploaded as a PDF-Document)

- 1. Excellence
- 2. Impact
- 3. Quality and Efficiency of the Implementation

max. 10 pages





### **Documents**

Part B – Document 2 (to be uploaded as a PDF-Document)

- 4. CV of the experienced researcher (5 pages)
- 5. Capacities of the participating organisations (1 page each)
- 6. Ethical aspects
- 7. Letters of commitment of partner organisation (GF only)





# Part B – Evaluation Criteria

- 1. Excellence (50%)
- 2. Impact (30%)
- 3. Quality and Efficiency of the Implementation (20%)

(cf. MSCA Work Programme 2018/20, pp. 67-70)

Impact	Quality and officiency	
impact	Appropriateness of the allocat of tasks and resources  Appropriateness of the allocat of tasks and resources  Appropriateness of the management structure and procedures, including risk management	
Enhancing the potential and future career prospects of the researcher		
Quality of the proposed measures to exploit and disseminate the project results		
Quality of the proposed measures to communicate the project activities to different target audiences		
	Appropriateness of the institutional environmen (infrastructure)	
30%	20%	
Weighting		
2	3	
	Cuality of the proposed measures to exploit and disseminate the project results  Quality of the proposed measures to communicate the project activities to different target audiences  30%  Weighting	





# Part B – Proposal text

#### **Format**

- Use footnotes (for references exclusively) at the bottom of each page – endnotes or citations within the text are not allowed
- Use font size 11 in running text, font size 8 in footnotes and tables
- Line spacing: **single**; not multiple or 1 ½
- Use Arial, Arial Narrow or TNR you can save at least ½ page by using TNR compared to Arial – do not use Verdana (font of the template)
- Respect the page limit by all means





B.1.1 Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects

- Introduction and state of the art: do not write an abstract, write an introduction (not as a start: "This research project focuses…", but "Since Einstein's ground-breaking theory of relativity, curvature of space is …" draw the bigger picture and raise curiosity.
- Objectives (i.e. research goals) and overview of the action (Research Work Packages should be mentioned here): describe your research goals and how they are embedded into your work plan (the research work packages)





- Research methodology and approach: highlight the type of research and innovation activities proposed and connect them distinctively to your objectives
- Originality and innovative aspects of the research
   programme → how does the research project contributes to the
   advancement of the field? (use words like "novel", "innovative",
   "first-time", "advance", "inter-/multidisciplinary")





Interdisciplinary aspects of the action (if relevant)

 Gender dimension in the research content (if applicable): must be mentioned in case of being a crucial part of the research project, i.e. sociological surveys, clinical trials, etc. with gender aspects





### Important aspects apart from the mentioned sub criteria

### Strengths

- Inter/multidisciplinary as well as innovative aspects are emphasized distinctively
- Research methodology is attuned to the research object and objectives explicitly
- Introduction is a launch to the overall topic, not an abstract of the proposal
- Brief mentioning of potential risks of the research project





### Important aspects apart from the mentioned sub criteria

#### Weaknesses

- Lack of current state of the art; most recent international results/developments are not mentioned
- Methodology is described in no satisfying conjunction with the objectives; pros and cons of the methodology are not explained explicitly enough
- Description of advancement of the field is missing
- No potential risks are mentioned (briefly)





# B.1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host

- How will the researcher acquire new scientific skills and transferable skills?
- Relevance and quality of the additional scientific education and the training of transferable skills
- Global Fellowship: How will the newly acquired skills be transferred back to the European host institution?





# B.1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host

### Separate chapter for:

- Scientific skills
- Transferable skills
- Transfer of knowledge from the researcher to the host
- → Mention the career development plan





#### Scientific skills:

- Which new techniques and methods will be acquired?
- How will they be acquired? Through research or trough specific courses?
- Training on "Research integrity", "big data/open science", digital techniques, tools, new techniques





### **Transferable skills (examples):**

- Teaching as well as tutoring/mentoring of students and doctoral candidates (→ leadership/communication skills)
- Project-/Financial-/Organisational Management (project planning, organization of a conference)
- Development and organisation of follow-up projects (fund raising, proposal writing)
- Acquisition/Development of abilities in working in an international environment (communication, building networks)
- Business Thinking (through your own project)
- Handling IPR, training in patent law
- Course in gender awareness





### Transfer of knowledge to the host institution

- Transfer of special scientific (unique) expertise to the host institution through the fellow
- Transfer of expertise to the host institution via teaching and mentoring undergraduates and PhD students
- Providing new network opportunities for the host institution





Important aspects concerning the training (scientific training as well as training of transferable skills)

### Concerning the qualifications (esp. transferable skills):

- They must be helpful to reach an independent position in research (relevant for career development)
- Must be complementary to yet existing abilities





### Frequently expressed criticism

- Description of training aspects too short (how the goals will be achieved)
- Transferable skills are not described significantly enough (holistic development of the researcher is important, not only scientific development)
- Lack of a concrete training scheme and its phases
- Lack of indicators/milestones to screen the training progress
- Training scheme is too ambitious
- Particular training elements are missing (esp. secondment to the industrial sector if possible/appropriate)





Adjust training and transfer of knowledge to the specific needs of the 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 → unrealistic
- Acquire management and leadership skills → you will need them in your (non-)academic future as an independent and mature researcher

Why is the host institution the **perfect match** regarding your accumulated (scientific and transferable) needs?

How can your expertise promote the host institution?





## B.1.3 Quality of the supervision and of the integration in the team/institution

Qualifications and experience of the supervisor(s)

- Track record (academic positions short)
- Level of experience on the proposed research topic
- How many publications (number) + most important journals?
   H-Index? Any major patents?
- Major international Collaborations + renowned Prices/Awards/Grants
- How many PhD students/Postdocs so far? → "success stories" are they now in leading positions?





#### **Hosting Arrangements**

- Further members of the research group
- Further chairs/working groups at the institution
- Interdisciplinary discourse at the institutions collective colloquia?
- Integration into (inter-)national networks

In case of a <u>Global Fellowship</u>: explain the practical issues and the help by the Welcome Centre/International: flat hunting, insurances, dealing with public authorities...





## B.1.4 Potential of the researcher to reach and re-enforce professional maturity/independence during the fellowship

#### **Keep it short**

- Research experience and results
- International publications (first authorships/single authorships)
- Experience in project implementation/management
- Fellowships/awards
- Experience in supervision/teaching
- Experience in the industrial sector
- International collaborations so far





#### **Self Description**

Do not be too modest (but stay authentic), your competitors are not modest either

Describe your individual achievements and potential

- → Explain why
- your scientific background is (to a certain degree) unique
- you have excellent potential
- you are perfectly able to carry out the project
- you would greatly benefit from this project





## B.1.4 Potential of the researcher to reach and re-enforce professional maturity/independence during the fellowship

- 7 publications so far → 4 more during the fellowship
- xy international cooperations so far → new networks
- no supervision/mentoring/tutoring so far → will gain first experience in this field
- some experience/skills in organisational/project management
   ⇒ will gain new skills (which are necessary for the next step in 2.1.)





#### **B 1.4 – What experts appreciated to date**

- Being proactive/showing one's own initiative (initiation of cooperation (also with the industry or foreign countries), research stays abroad, short research stays in well-respected labs/research groups, organisation of scientific events)
- Proactive pushing of research activities, participation in project management, procuration of third-party funds
- Publications as single/first author
- Supervision of students/doctoral candidates





## **B.2.1 Enhancing the future career prospects of the researcher** after the fellowship

Illustration of how the research and training activities (incl. secondments) make a positive impact on the researcher's career (after the fellowship)

→ Where do you want to go? How does the IF contribute to getting there?

And: Impact on European Research Area (ERA) and European society/economy (only briefly)





#### Impact – Impact on personal career development

- Now you are at 80% → the MSC-IF gives you the missing 20%
  - You will be integrated in existing European and international networks of the host institution as well as have created your own (transnational) networks
  - You will apply the project management experience in the future
  - You will apply your leadership skills you learnt through the supervision of undergraduates and PhD students in the future
  - You will be able to work in an international and interdisciplinary research environment





#### Impact – Impact on personal career development

- You will be more visible in the scientific community as you will have produced great publications
- You will have gained teaching experience necessary to get a call for a professorship
- You will know perfectly how to write research proposals

Ideally, all this will bring you in a position to be a fully independent researcher, to apply e.g. for an ERC grant, to be a group leader/junior professor, to get a call for a chair, to initiate your own international collaborations as the coordinating person





#### Impact on ERA

- Your research contributes to Europe strengthening its worldleading position in your field of research (if Europe holds this position now), or
- Your research will help to reduce or close the gap to e.g. the USA/Asia (if they are currently leading)
- And: the new networks will be sustainable and contribute to European researcher's mobility in the future





#### Impact on European society/economy

- There is the Europe 2020 strategy
   (https://ec.europa.eu/info/business-economy-euro/economic-and-fiscal-policy-coordination/eu-economic-governance-monitoring-prevention-correction/european-semester/framework/europe-2020-strategy\_en)
- and there are 7 major societal challenges Europe has to face (<a href="http://ec.europa.eu/programmes/horizon2020/en/h2020-section/societal-challenges">http://ec.europa.eu/programmes/horizon2020/en/h2020-section/societal-challenges</a>)
- Inform yourself about and try to embed your research into one of these challenges and shortly mention it





#### These 7 societal challenges are:

- Health, demographic change and wellbeing;
- Food security, sustainable agriculture and forestry, marine and maritime and inland water research, and the Bio-economy;
- Secure, clean and efficient energy;
- Smart, green and integrated transport;
- Climate action, environment, resource efficiency and raw materials;
- Europe in a changing world inclusive, innovative and reflective societies;
- Secure societies protecting freedom and security of Europe and its citizens





## B.2.2 Quality of the proposed measures to exploit and disseminate the project results

- Identify your target groups (not just the scientific community, it can be e.g. politics, think tanks, special interest groups, companies, etc. as well)
- Dissemination via journals: explicitly name the journals, do not just write "high impact journals/most renowned journals"
- Dissemination via conferences: explicitly name the conferences you are going to attend, do not just write "the results will be presented at the international conferences of the field"





 Always mention open access – though it is mandatory in MSCA anyway, one has to mention that there will be open access, but -> not only publications in open access journals! Fees can be paid with the institutional unit costs

 If there are further stakeholders: invite them to a talk, arrange a special section for them when organising a conference/workshop etc. – explain why your results will be of interest to them

Bonn, 3 May 2018 5<sup>-</sup>





#### **Exploitation of results and intellectual property**

- At best, the results respectively new techniques/methods are applicable immediately
- Applicability of the product in the industrial sector
- If not applicable directly: give a prospect how your results may be applicable in the long-term (pure research is seldom applicable immediately)
- Mention possible patents
- IPR must be respected in any case: refer to IP Department of your institution who will handle it, refer to the partnership agreement, refer to the accordance with IP Guidelines of Horizon 2020 (<a href="https://www.iprhelpdesk.eu/FS\_IP\_Management\_H2020\_proposal">https://www.iprhelpdesk.eu/FS\_IP\_Management\_H2020\_proposal</a>)





## B 2.3 Quality of the proposed measures to communicate the projects activities to different target audiences

The project must reach a broad public (the tax payers, who, in fact, finance your research), not only a broad scientific community (considered as essential).

Adequate measures to reach this goal are:

- Collaborations with schools
- Participation in Girls' Day/Boys' Day or similar events
   Sepecially in science to reach the underrepresented females





- Open Lab Days, participation in science nights (MSCA Researchers' Night)
- Participation in scientific events, e.g. science slams
- Interviews with newspapers, articles in local press or articles in journals of popular science
- Public lectures (can be in the context of conferences)
- Apply for "MSCA fellow of the week" on Facebook (<a href="https://www.facebook.com/Marie.Curie.Actions">https://www.facebook.com/Marie.Curie.Actions</a>) or use other social media (create a Youtube-channel, write a blog, etc.)
- In case of installing a website: make sure it is linked to further sites to generate enough visitors (MPG, your university/institutes website and their social media sites)





#### **Communication and Public Engagement**

- These activities must be credible and, at best, in accord with own experience as well as existing activities of the host institution
- Always refer to the support of the institution's Press Office and Event Office and their contacts to the media etc.
- Explain why you are going to participate: Do not just write you will participate in the Girls' Day you will participate because one cannot start early enough to try to raise curiosity for research (pupils) and, in this special case, to attract women for science (as they are underrepresented in e.g. Physics)





## B.3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

Write an introductory phrase that the plan is perfectly thought through,

then: shortly describe **each work package** (research work packages should have been described in the Excellence chapter in more detail) with its corresponding **Deliverables** and **Milestones** (and the secondment, if applicable) → in running text, marked (**D1.1**, **D1.2** ..., **M1.1** ...) in heavy print – **you do not have to use tables which waste space** 





#### Gantt Chart (not more than 1/3 or 1/2 page)

You do not have to use the one from the Guide for Applicants, this is just an example; put it in **grouped style** according to the text

							Ye	ar 1											Yea	ar 2											Yea	ar 3					
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

Deliverable

M D





## B.3.1 Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources

- Describe how the work planning and the resources mobilised will ensure that the research and training objectives will be reached
- Explain why the amount of person-months is appropriate in relation to the activities proposed

Brief justification why your research will be conducted exactly the way as proposed





## B.3.2 Appropriateness of the management structure and procedures, including risk management

#### Organisation and management structure

Experience of the involved scientists and the finance department with the implementation of third-party funded projects; allocation of tasks in the project (who manages what?); progress monitoring mechanisms (e.g. bi-weekly meetings, short progress reports, attending colloquia to get feedback, CDP etc.)





Research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur

 Risk evaluation (research risks), especially if the project depends on external parameters/preconditions; outline alternatives in case of problems – if there is no risk at all, then maybe it is not first-class research

If no risks and corresponding alternative strategies are mentioned, it is considered a major weakness





## **B.3.3** Appropriateness of the institutional environment (infrastructure)

- Describe your workplace offered by the institution (equipment) and the institute (very briefly)
- Describe the key facilities (laboratories, libraries (access to how many e-journals etc.) necessary for your project
- Mention further institutions in the region (other MPIs with their facilities (if applicable), universities (if applicable), access to other libraries (Landes-/Staatsbibliothek as well) – draw a picture of an inspiring research region





Mention under any circumstances the Welcome
 Centre/International Office (support in flat-hunting, dealing with public authorities and insurances, organisation of events for incoming fellows etc.), the Career Centre (that offers the training courses) and if your host is a family-friendly workplace (childcare etc.)





**Description of the main tasks** and commitment of the beneficiary and all partner organisations (if applicable)

In my opinion, everything that is required here, should have been already said in the proposal. Write a

Short and concise statement why this project in exactly this constellation (you, the host (expertise and infrastructure), the proposed research with its great goals and expected results) must be considered as outstanding / is a perfect match. It is synergetic and bigger than the sum of its parts.

Make the reviewer think "Wow! This has to be funded without ifs and buts."





#### General hints

- Write the proposal in cooperation with the supervisor/host institution
- Let others (non-experts as well) read your proposal
- Avoid too many spelling errors → make use of professional proofreading if necessary
- Adhere closely to the given format
- Readability: Make it easy to find the relevant aspects in the text, use figures, emphasise by formatting (heavy type), separate sections, use footnotes sparingly (just documentation, no important information), ...
- Do not overuse graphs etc.





#### General hints

- Do not use super special language exclusively (experts are not necessarily from your exact field of research)
- Avoid a manifold usage of external resources (links to websites)
- The **beginning** of your proposal must arouse curiosity and impression, the **end** must be a harmonious final chord → these two paragraphs are of special importance in any kind of text
- Do not underestimate any category of a proposal with less value concerning the evaluation criteria → All parts of the proposal are important to be successful
- Do not write a technical report tell a story, sell a story
- Do not hesitate to contact your EU Liaison Office and the National Contact Point





#### Links

http://www.net4mobility.eu/ncp-doc.html

- Guide outreach activities
- IF Survivors' Guide
- Guide proposal Writing
- Guide IP-Management





# The German National Contact Point for Marie Skłodowska-Curie actions

www.nks-msc.de/en/

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Now we are making a 5-minute break and will be answering your questions via the chat function afterwards.

