



Marie Skłodowska-Curie Actions in Horizon Europe

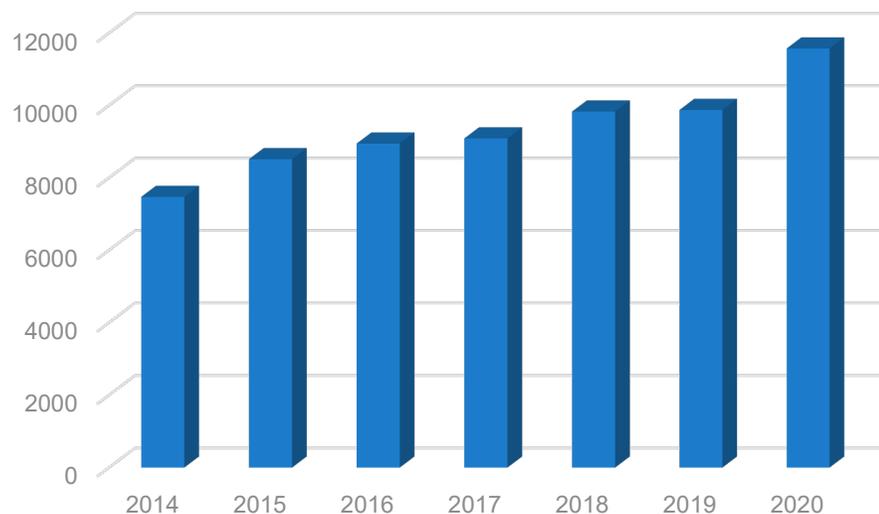
Focus on MSCA Postdoctoral Fellowships

28 June 2021

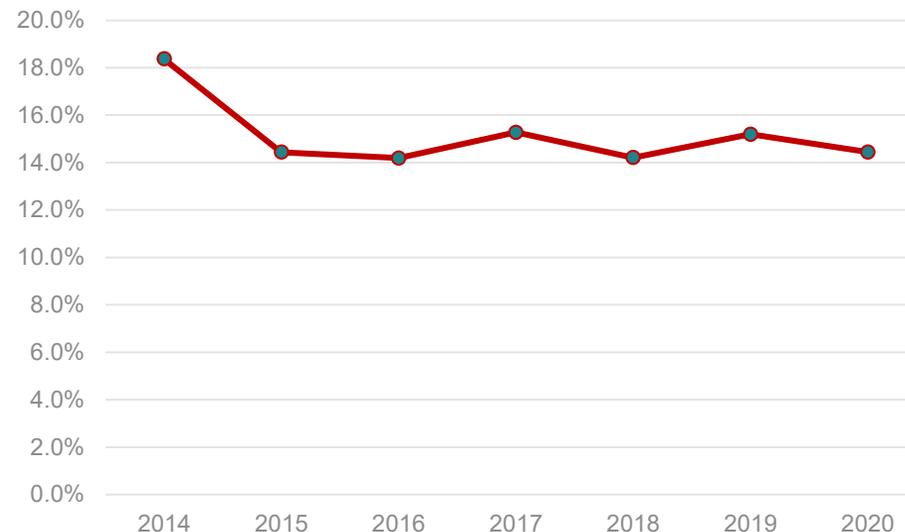
David WIZEL
REA.A4

IF under H2020

IF submission evolution

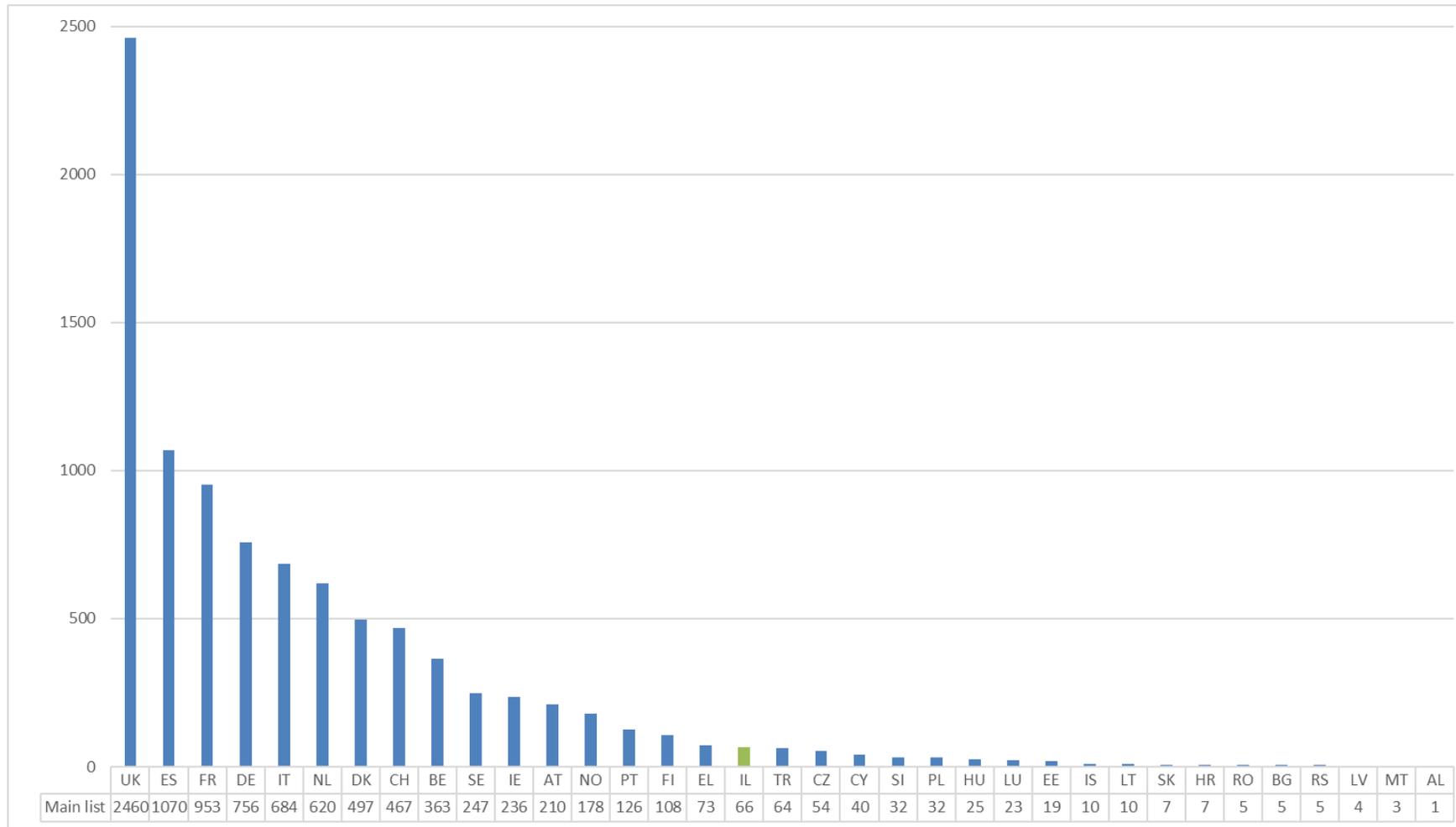


IF Success rate

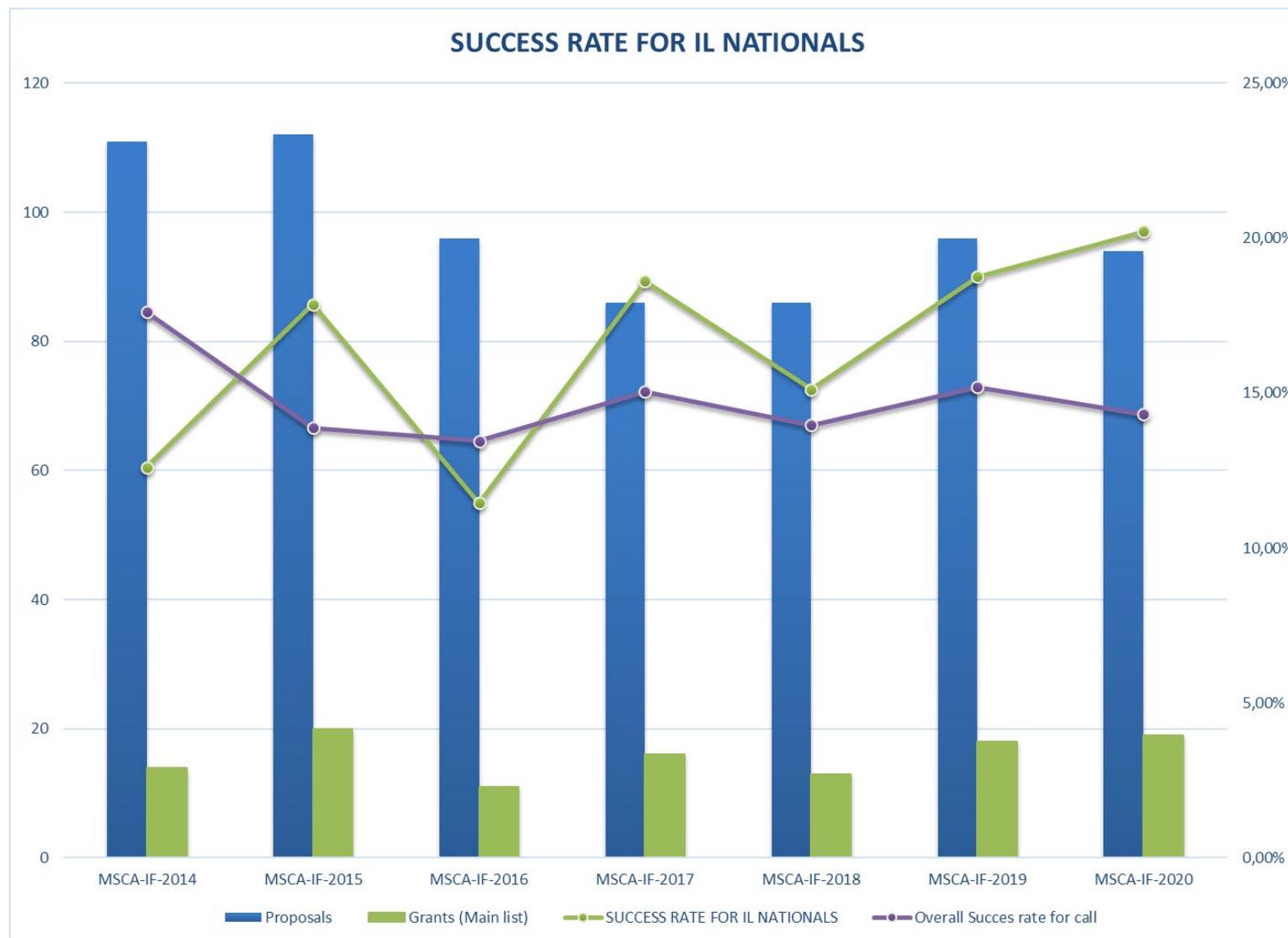


	2014	2015	2016	2017	2018	2019	2020
Proposal submitted	7472	8514	8946	9089	9830	9875	11573
Proposals evaluated	7409	8380	8829	8957	9676	9709	11382
WP budget M€	240,5	215	218,71	248	273	296,49	328
GA signed	1361	1210	1253	1368	1375	1475	1644
Success rate	18,4%	14,4%	14,2%	15,3%	14,2%	15,2%	14,4%

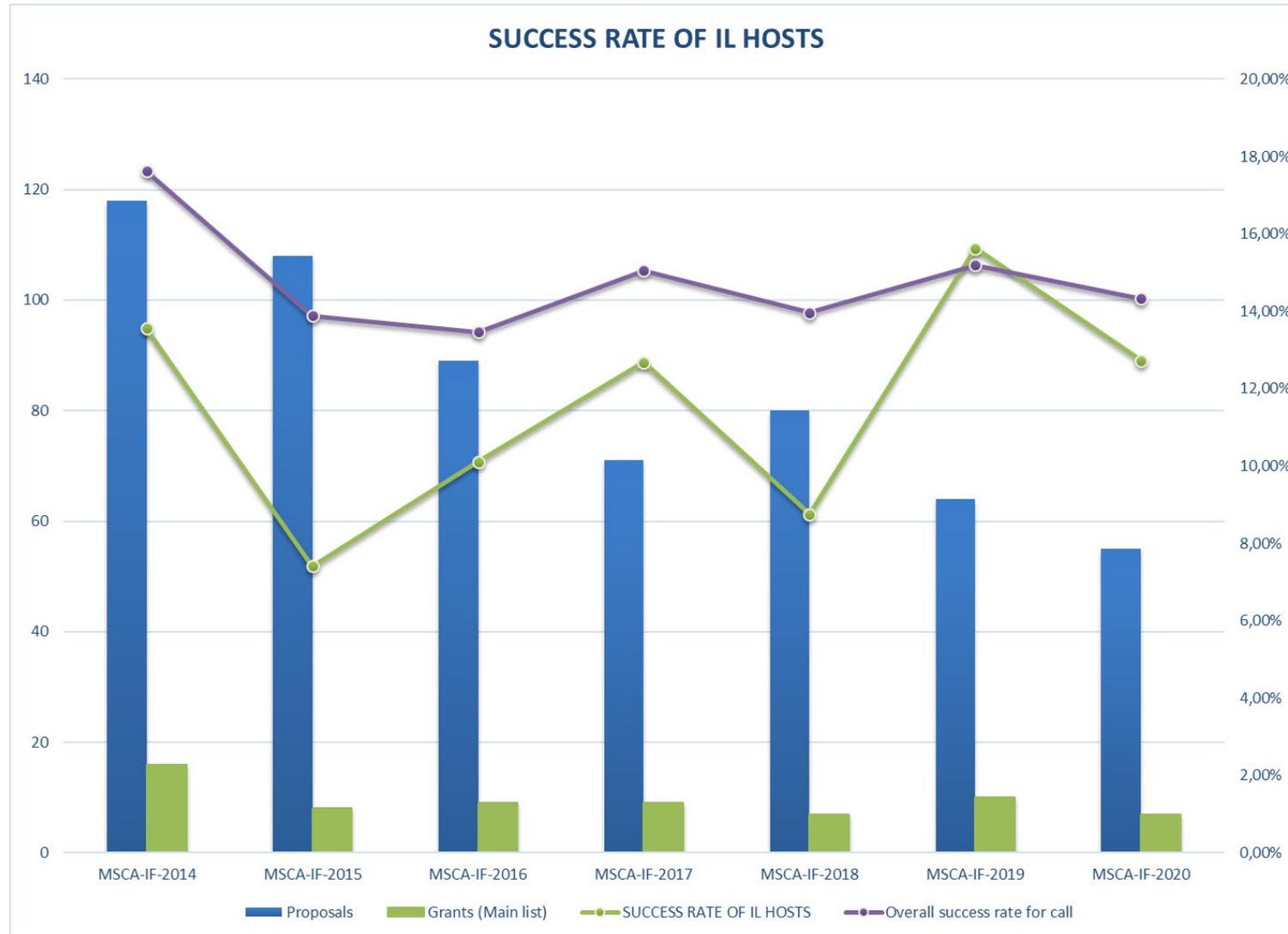
IF under H2020



IF under H2020



IF under H2020



Postdoctoral Fellowships

Main objectives:

- **Foster excellence** through implementation of a research project
- Enhance the **creative and innovative potential** of researchers **holding a PhD** (training on transferable skills & career development)
- Focus on **i3** (international, inter-sectoral, interdisciplinary) **mobility**
- Bridges and **exposure to the non-academic sector**

Postdoctoral Fellowships

Two main types of Fellowships:

- European Fellowships (EF)
- Global Fellowships (GF)

All research topics including Euratom areas new

- Estimated budget: EUR 1 million in 2021
- Competition within regular scientific panels, no separate ranking
- Stricter eligibility conditions linked to Euratom MS/AC

ERA Fellowships – duplication of qualifying proposals into separate call – similar to H2020 Widening Fellowships:

- Estimated budget: EUR 8 million in 2021
- Spreading excellence and contribute fostering balanced brain circulation in Widening Countries
- Similar implementation mode to H2020 WF Fellowships: duplication of successful proposals

Postdoctoral Fellowships

Project duration:

- **European Fellowships:** between 12 and 24 months
- **Global Fellowships:** outgoing phase between 12 and 24 months in TC, followed by a mandatory 12 month return phase in EU MS/AC

Possibility to add a **non-academic placement at the end of the project for a duration of up to 6 months** (EF and GF) new

Placement < > secondment ! (*see below*)

Postdoctoral Fellowships

Eligible organisations:

European Fellowships:

- One host organisation in EU MS / AC (any sector)

Global Fellowships:

- One host organisation in EU MS / AC (any sector)
- One associated partner organisation in a TC (any sector)

Optional for EF and GF: non-academic partner organization in view of an optional placement at the end of the project

Postdoctoral Fellowships

Eligible organisations:

Academic sector

Public or private **High Education Institutions**
awarding academic degrees

Public or private **non-profit research organisations**

International **European interest**
organisations

Non-academic sector

Broad definition:

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

Postdoctoral Fellowships

Eligible researchers – European Fellowships:

Nationality	Any
Mobility	The researcher cannot have resided or carried out his/her main activity (work, studies, etc.) in the country of the beneficiary for more than 12 months in the three years immediately prior to the call deadline
Research experience (FTE)	Maximum 8 years from date of award of the (first) doctoral degree new This limit can be extended for the following reasons (to be encoded in the submission forms): <ul style="list-style-type: none">- Maternity leave (18 months – i.e. 548 days) per child born after the PhD award date, or exact duration of leave taken, whichever is longest);- Paternity leave (exact duration per child born after the PhD award date);- Research in a non-associated TC (only for nationals or long-term residents of MS or AC, wishing to reintegrate in Europe); For EF ONLY- Compulsory national service;- Time spent not working in research- Long-term sick leave (periods longer than 30 days).

new

Doctoral Degree (or, date of successful defense) should be obtained before call deadline

Postdoctoral Fellowships

Eligible researchers – Global Fellowships:

Nationality	Nationals or long-term residents of EU MS or HE AC.
Mobility	The researcher cannot have resided or carried out his/her main activity (work, studies, etc.) in the country of the associated partner (in the third country) for more than 12 months in the three years immediately prior to the call deadline
Research experience (FTE)	<p>Maximum 8 years from date of award of the (first) doctoral degree new</p> <p>This limit can be extended for the following reasons (to be encoded in the submission forms):</p> <ul style="list-style-type: none">- Maternity leave (18 months – i.e. 548 days) per child born after the PhD award date, or exact duration of leave taken, whichever is longest);- Paternity leave (exact duration per child born after the PhD award date);- Compulsory national service;- Time spent not working in research (also applies to part-time contracts);- Long-term sick leave (periods longer than 30 days).

new

Doctoral Degree (or, date of successful defense) should be obtained before call deadline

Postdoctoral Fellowships

(Optional) Secondments vs placements:

	Secondment		Non-academic placement
Maximum Duration new	<i>EF:</i> Up to 1/3 of the normal project duration	<i>GF:</i> Up to 1/3 of the duration of the outgoing phase	Up to 6 months duration
Timing	<i>EF:</i> At any time during the standard project duration	<i>GF:</i> - up to three months possible at the start of the outgoing phase at the beneficiary (to be included within the 1/3 maximum duration) - not allowed during the mandatory 12 month return phase new	Additional period after the standard duration of the fellowship
	Can be divided in several smaller periods new		
Mobility	Any country <i>worldwide</i>		EU Member State or Horizon Europe Associated Country
Sector	Any sector		Non-academic sector only
Encoding in part A	Yes. In "Call Specific Questions" - complete all required information.		Yes. The associated partner must be encoded as a participating organisation.
Description in part B1	Yes. Its relevance and quality will be assessed by the evaluators.		Yes. Its relevance and quality will be assessed by the evaluators.
Supporting Doc in part B2	None.		Yes. A letter of commitment is required.

new

MSCA in HE – PF

Award criteria

PF – award criteria

Excellence	Impact	Quality and efficiency of the implementation
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)	Credibility of the measures to enhance the career perspectives and employability of the researcher and contribution to his/her skills development	Quality and effectiveness of the work plan , assessment of risks and appropriateness of the effort assigned to work packages
Soundness of the proposed methodology (including <i>interdisciplinary</i> approaches, consideration of the <i>gender</i> dimension and other <i>diversity</i> aspects if relevant for the research project, and the quality of <i>open science</i> practices)	Suitability and quality of the measures to maximise expected outcomes and impacts , as set out in the dissemination and exploitation plan, including communication activities	Quality and capacity of the host institutions and participating organisations , including hosting arrangements
Quality of the supervision, training and of the two-way transfer of knowledge between the researcher and the host	The magnitude and importance of the project’s contribution to the expected scientific, societal and economic impacts	
Quality and appropriateness of the researcher’s professional experience , competences and skills		
50%	30%	20%

PF – award criteria

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)

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, including sharing and management of research outputs and engagement of citizens, civil society and end users, where appropriate)

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

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

PF – award criteria

Excellence:

Changes to H2020:

- H2020 subcriterion 1.1 split in two parts in HE (now 1.1 and 1.2)
- H2020 subcriteria 1.2 and 1.3 merged into one in HE (now 1.3)

New in HE:

- Optional placement in non-academic sector assessed under HE criterion 1.3
- Gender dimension and open science to be addressed

PF – award criteria

Impact:

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

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

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

PF – award criteria

Impact:

Changes to H2020:

- H2020 subcriteria 2.2 and 2.3 merged into one in HE (now 2.2)

New in HE:

- Addition of subcriterion 2.3: Impact assessed not only in scientific area, but also on societal and economic levels

PF – award criteria

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

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

PF – award criteria

Quality and efficiency of the implementation

Changes to H2020:

- Re-arranging and merging of three H2020 subcriteria into 2 HE subcriteria

MSCA in HE – PF

Budget structure

PF – budget structure

Contributions for recruited researchers Per person-month					Institutional unit contributions Per person-month	
Living allowance	Mobility allowance	Family allowance (if applicable)	Long-term leave allowance (if applicable)	Special needs allowance (if applicable)	Research, training and networking contribution	Management and indirect contribution
EUR 5 080	EUR 600	EUR 660	EUR 5 680 x % covered by the beneficiary	Requested unit ¹ x (1/number of months)	EUR 1 000	EUR 650

* Living allowance is adapted with the country correction coefficient listed in the WP
 EF= 1 coefficient for the country of the beneficiary
 GF= 1 coefficient for the country of the beneficiary + 1 coefficient for the associated partner hosting the outgoing phase

PF – budget structure

Living allowance to cover personnel costs for the employment of researchers with full social security coverage.

Mobility allowance to cover additional, private (not professional) mobility-related costs, e.g. travel and accommodation costs.

Family allowance covers mobility-related costs of researchers with family obligations – defined by:

- (i) marriage
- (ii) relationship with equivalent status to marriage (under the law of the country or region in which this relationship was formalised)
- (iii) dependent children who are actually being maintained by the researcher

new

The allowance is due if the researcher has or *acquires* family obligations during the action's implementation.

PF – budget structure

The **Research, Training and Networking** costs contribution should cover:

- costs for training and networking activities that contribute directly to the researchers' career development (e.g. participation in conferences, trips related to work on the action, training, language courses, seminars, lab material, books, library records, publication costs, research expenses)
- visa-related fees and travel expenses, additional costs arising from optional secondments (e.g. travel and accommodation costs).

The **Management and Indirect** costs contribution should cover the beneficiary's additional costs in connection with the action (e.g. personnel costs for project management, indirect costs)..

All above rates apply to postdoctoral researchers devoting themselves to their project on a **full-time basis**. Part-time (max. 50%) for personal, family, professional reasons subject to REA approval.

MSCA in HE – PF

Proposal submission

PF – proposal submission

Key features:

Part A: use of submission wizard (same principle as H2020)

Researcher information:

- PhD award date only, no other qualification fields available
- Residency and activity table : same principle as H2020
- Table for extensions on the 8-year post PhD limit – number of days/category only, beneficiary to keep relevant records

Beneficiary information:

- PIC based: same principle as H2020
- Non-academic placement host and secondment host
- Gender Equality Plan

Budget:

- Family allowance (selection box as H2020)
- Long term leave allowance and special needs allowance (not visible in proposal as cannot be requested at that stage)

PF – proposal submission

Key features:

new

Ethics self-assessment

Security self-assessment (*corporate approach*)

Call specific questions (non-exhaustive)

- Euratom: applicant to confirm if they qualify for the Euratom topics/conditions
- **ERA Fellowships: applicant to confirm if they wish to be considered for ERA call (question appears based on qualifying PIC country)**
- Secondment information
- Optional non academic placement information

Keywords are updated for HE

- main principle remains: KW's 1, 2 mandatory and of selected scientific panel, KW 3 mandatory and of any panel, KW's 4 and 5 optional and of any panel

Resubmissions

- question will appear in the forms, however resubmission restrictions do not apply for HE-MSCA-PF-2021 call

PF – proposal submission

Important:

Part B-1 is strictly restricted to 10 pages.

=> a cover page, table of contents, ...on page 1, 2, will count towards the page limit and automatically result in excess pages that cannot be evaluated

=> the Part B-1 should start with “1. Excellence” (instructions, definitions to be deleted before submission)

Part B-2 (no page restriction):

- Researcher’s CV
- Letters of commitment (*host for outgoing phase of GF or non-academic placement host*)
- *Participating organisations (max 1 page for beneficiary, max ½ page others)*
- *Ethics & Security (additional info, if needed)*

MSCA in HE – PF

Evaluation

PF – evaluation

Evaluation process

- **No major changes** compared to H2020:
 - use of external experts
 - SEP platform
 - Three evaluation criteria, scored out of 5, using decimals
 - Overall threshold of 70% (restricting resubmissions in 2022)
- Establishment of **ranking lists**:
 - Ex-aequo criteria **new**
 - Euratom proposals considered as the other ones
 - ERA Fellowships ranked

PF – evaluation

The priority order for **ex-aequo proposals** will be established as follows:

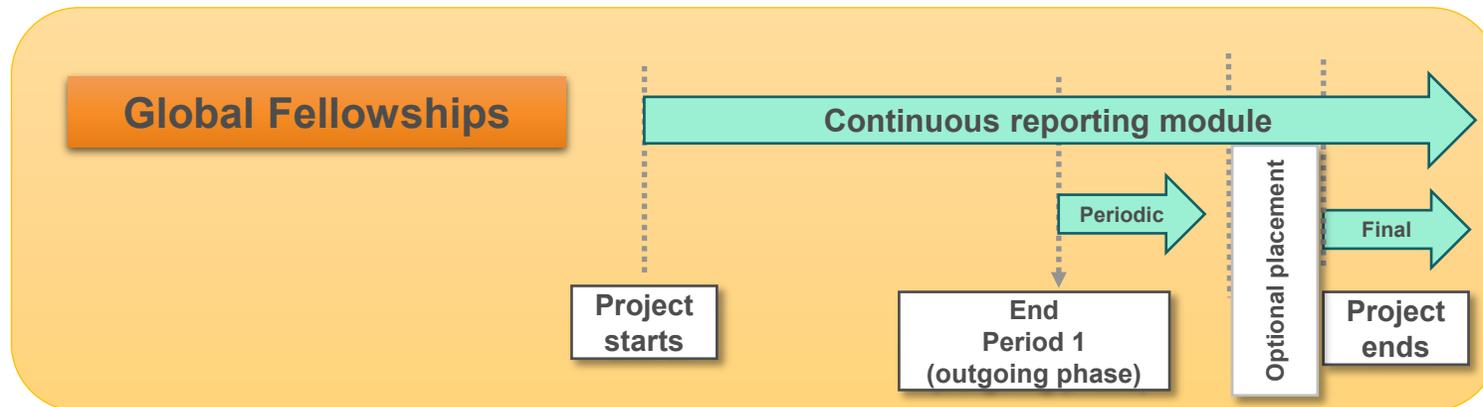
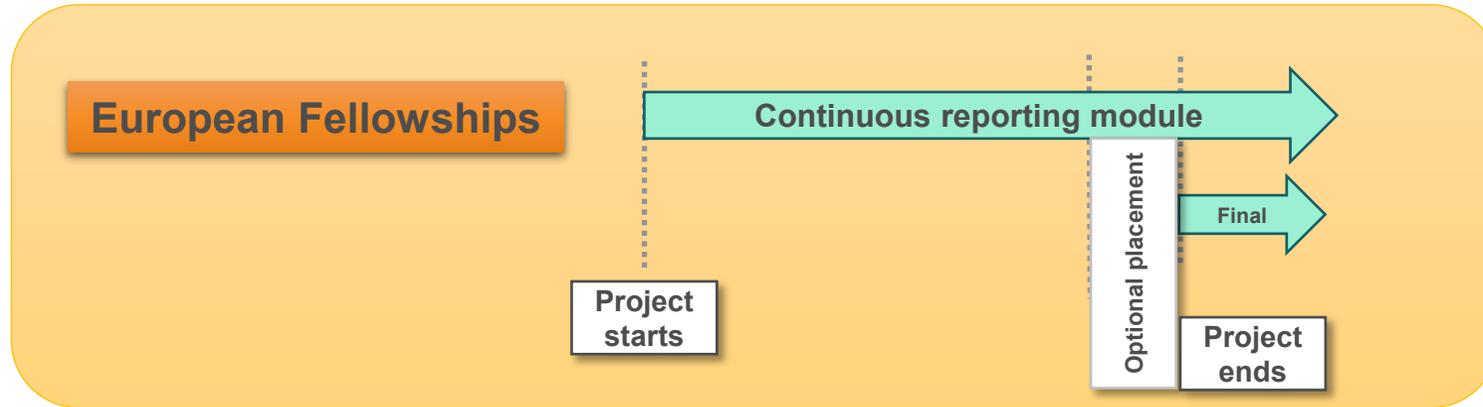
- Score awarded for the criterion ‘Excellence’
- In case of equality, scores awarded for the criterion ‘Impact’
- If necessary, the gender balance among PF fellows
- If a distinction still cannot be made, the panel may decide to further prioritise by considering other factors, such as:
 - *gender and other diversity aspects in the research activities*
 - *participation of the non-academic sector (including involvement of SMEs)*
 - *geographical diversity*
 - *favourable employment and working conditions*
 - *relationship to the Horizon Europe objectives, in general.*

MSCA in HE – PF

Project implementation

PF – project implementation

same principle as in H2020



PF – project implementation

- **Continuous Reporting Module:**

- activated at project start and remains activated beyond its end
- project-related updates:
 - Publishable summary
 - Deliverables
 - Publications
 - Dissemination and Communication activities
 - Patents (IPRs)

new

- **The (Researcher) Mobility Declaration:** enables the beneficiary to encode the start date of the project, suspend the project, etc. simply by updating it when required.

- **Periodic/Final Reporting Module:**

- activated at the end of the reporting period
- **Part A:** structured information gathered by the portal
- **Part B:** narrative description of work performed
- To be submitted **within 60 days after the end of the reporting period**

PF – project implementation

Formal deliverables

- new** • The **Mobility Declaration**: to be submitted within 20 days of the start of the research training activities (and updated, *if needed*)
- new** • **Career Development Plan**: due by month 6, and updated if needed throughout the project.
- new** • **Dissemination and Exploitation Plan**: due “towards the end of the project”.
 - **Questionnaires**: evaluation questionnaire by the recruited researcher at end of the fellowship, plus a follow-up after two years
 - **Data management plan**: due by month 6; same as in H2020, with automatic opt-in but possibility to opt out

MSCA in HE – PF

2021 – 2022 Call details

PF – call details

Call	2021		Call	2022	
	Opening Closing	Budget (M€)		Opening Closing	Budget (M€)
Postdoctoral Fellowships	22 June 2021 12/10/2021	242	Postdoctoral Fellowships	13/04/2022 14/09/2022	257

- *ERA Fellowships call: budget of EUR 8 million in 2021*
- *Euratom: indicative contribution of EUR 1 million in 2021*

Toda Raba

European Research Executive Agency
https://rea.ec.europa.eu/index_en