



FFG

Introduction to the Marie Skłodowska-Curie Individual Fellowships:

How does it work and what is funded?

- The Marie Skłodowska-Curie Individual Fellowship at a Glance: Why Funding? For Whom, What? Where and How Long?
- How it works: Who is Who, Budget calculation & Mobility Rule
- The different formats of an IF in detail

Excellent Science

1. European Research Council (ERC)
2. Future and Emerging Technologies (FET)
- 3. Marie Skłodowska-Curie Actions**
4. Research Infrastructures

Industrial Leadership

1. Leadership in Enabling and Industrial Technologies (LEIT) incl. Key Enabling Technologies (KETs)
2. Access to risk finance
3. Innovation in SMEs

Societal Challenges

1. Health, Demographic Change and Wellbeing
2. Food Security, Bioeconomy
3. Energy
4. Transport
5. Climate Action, Raw Materials
6. Inclusive, innovative and reflective societies
7. Secure societies

- Spreading excellence and Widening Participation
 - Science with and for Society
 - European Institute for Innovation- and Technology – EIT
 - Joint Research Centre – JRC



MARIE SKŁODOWSKA-CURIE ACTIONS – WHY?

?

Who applies for funding?

*a) the individual in cooperation with the future host institution?
b) one or several institutions (consortia)?*

Individual Fellowships
research, training and career development for individual researchers

Strengthen the number and the qualifications of researchers in Europe

Innovative Training Networks
networks for research training of early stage researchers

COFUND
Co-funding of regional, national and international programmes (doctoral & fellowship)

Research and Innovation Staff Exchange
international and intersectoral staff exchange

European Researchers' Night
bringing researcher closer to the general public

AIMS OF THE MSCA INDIVIDUAL FELLOWSHIP

Research, training and career development for individual researchers

- *Enhance the creative and innovative potential of experienced researchers through advanced training, international, interdisciplinary and intersectoral mobility*
- *Increase the set of skills, leading to improved employability and career prospects both in and outside academia*
- *Enhance cooperation and stronger networks*
- *Ensure a better transfer of knowledge between sectors & disciplines*

http://ec.europa.eu/research/participants/data/ref/h2020/wp/2016_2017/main/h2020-wp1617-msca_en.pdf

MSCA INDIVIDUAL FELLOWSHIP – FOR WHOM?

Experienced researcher (= fellow)

at the date of call deadline in the possession of a doctoral degree or at min. 4 years of full-time equivalent research experience

NB: research experience is measured from the date when the researcher obtained the degree entitling him/her to embark on a doctorate – even if a doctorate was never started or envisaged.

- no age restriction
- nationality in many cases not relevant

together with the host institution* (= beneficiary)

** legal entity in the academic or non-academic sector established in a European Union Member State or Associated Country (MS/AC)*



MSCA INDIVIDUAL FELLOWSHIP – FOR WHAT?

Bottom-up... the topic of the research project is chosen freely

Anything goes... **except for**

- areas of research covered by the EURATOM treaty
- activities prohibited in the EU, in particular
 - (a) aim at human cloning for reproductive purposes; (b) intend to modify the genetic heritage of human beings which could make such changes heritable (with the exception of research relating to cancer treatment of the gonads, which may be financed), or (c) intend to create human embryos solely for the purpose of research or for the purpose of stem cell procurement, including by means of somatic cell nuclear transfer.
- dual use - exclusive focus on civil applications



WHERE CAN I GO WITH AN INDIVIDUAL FELLOWSHIP?

„EUROPE“ or „European“ in MSCA covers:

- **all member states of the European Union („MS“)**
- **countries associated to Horizon 2020 („AC“)**

Iceland, Norway, Albania, Bosnia and Herzegovina, the former Yugoslav Republic of Macedonia, Montenegro, Serbia, Turkey, Israel, Moldova, Switzerland, Faroe Islands, Ukraine, Tunisia, Georgia, Armenia

ALL other countries are so called „THIRD COUNTRIES“ („TC“)

→ **Check the latest update** before applying for funding

http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/3cp/h2020-hi-list-ac_en.pdf



WHERE AND HOW LONG CAN I GO?

THE MSCA INDIVIDUAL FELLOWSHIP: 2 FORMATS

European Fellowships “EF”

Between 1-2 years at a “European” institution (MS/AC)
4 different subschemes

Global Fellowships “GF”

max. 3 years – starting outside “Europe” with an institution located in a third country (TC), followed by a return phase in Europe (MS/AC)

?
Remember the definition of „European“ and „third country“ in MSCA?

Good to know: During the fellowships secondments are possible – to other institutions in MS/AC

SECONDMENTS DURING THE FELLOWSHIP

IF aims: “international, intersectoral & interdisciplinary mobility”

→ secondments to gain intersectoral (academic → non-academic) and interdisciplinary experience / skills development etc.

Secondment rules in IFs

- must significantly contribute to the impact of the fellowship – see above
- secondment ≠ short visit or field trips
- only to institutions located in “Europe” (MS or AC)
- depending on overall IF duration max. 3 or 6 months for secondments

Overall Duration of the Fellowship	Maximum Duration of the Secondment
< 18 months	max. 3 months
> 18 months	max. 6 months

Some statistics – Secondments & PhD [IF call 2014 results]



Secondments

- *Out of a total number of **7,409** evaluated proposals, **2,189** proposals included a secondment phase (percentage **29.5%**)*
- *Out of a total number of **1,305** retained proposals (main list), **441** proposals included a secondment phase (percentage **33.7%**)*

Fellows with PhD*

- *Out of a total number of **7,409** evaluated proposals, **6,803** fellows had a PhD degree (percentage **91.8%**)*
- *Out of a total number of **1,305** retained proposals (main list), **1,219** fellows had a PhD degree (percentage **93.4%**)*

**includes only fellows with a PhD. The rest either do not have a PhD or are in the process of obtaining one*



THE MSCA INDIVIDUAL FELLOWSHIP AT A GLANCE


- ... a **personalized research and training project** either at
 - a host institution in MS/AC – „Europe“ (**European fellowship**) or
 - a host institution in a TC – „outside Europe“ with a return phase spend at an institution located in Europe (**Global fellowship**)
- **for experienced researchers** (PhD or > 4 years research experience)
- **bottom-up**: research topic is defined by the researcher (future fellow)
- **duration: 1-2 years (European) and 2-3 years (Global fellowship)**
- **secondments** and **short trips** to other institutions are possible
- **no age limit**
- **no restrictions on nationality** (in almost all types of fellowships)
- **mobility rule** (in some types of fellowships: **extended mobility rule**)

- ✓ The Marie Skłodowska-Curie Individual Fellowship at a Glance: Why Funding? For Whom, What? Where and How Long?
- **How it works: Who is Who, Budget calculation & Mobility Rule**
- The different formats of an IF in detail

WHO IS WHO?

- Host organisation in MS/AC – „beneficiary“
- Partner organisation – „outgoing host“ (GF) or „secondment host“
- Experienced researcher or „the Fellow“
- Research Executive Agency (REA)

BUDGET CALCULATION



Country Code ³⁴	CCC
EU Member States	
AT	104.8%
BE	100.0%
BG	71.5%
CY	91.8%
CZ	83.8%
DE	98.8%
DK	135.3%
	78.3%

- Living costs & extra expenses (mobility and family) of fellows
- Research-, training-, networking costs for the project
- Management- und Overheadcosts

NB: Calculation of the budget is done based on fixed amounts or *units* multiplied by the number of months (=total duration) of the fellowships.

for more precise picture on income (living allowances) → check with your future host

Researcher unit cost (person/month)			Institutional unit cost (person/month)	
Living allowance*	Mobility allowance***	Family allowance ****	Research, training and networking	Management and overheads
4.650 €** (55.800 €/year)	600 €	500 €	800 €	650 €

Example IF budget from institutional perspective (without contry correction coefficient)

Global fellowship à 36 person months → sum of units *36 = appr. 259.000 €

European fellowship à 24 person months → sum of units * 24 = appr. 172.000 €

* Country correction coefficient has to be applied (AT: 104,8%)

** Basic gross amount (brutto/brutto, including compulsory deductions)

*** In Austria tax free; family allowance will be taxed

**** If married (or equivalent) and/or depending children; status taken from the time of the deadline

THE MOBILITY RULE

OPTIONS FOR THE FELLOW: TIME & PLACE



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15.9.2012



*Depending on the fellowship type:
Where have you carried out your main activity in the last 3 (5) years prior deadline?*

15.9.2014

MOBILITY RULE

„spent max. 1 year during the last 3 years in the country of the future host institution“
→ European Fellowship Standard & Global Fellowship – Outgoing host

EXTENDED MOBILITY RULE

„spent max. 3 years during the last 5 years in the country of the future host institution“

Call deadline
14th of
September
2017

- ✓ The Marie Skłodowska-Curie IF at a Glance:
Why Funding? For Whom, What? Where & How Long?
- ✓ How it works: Who is Who, Budget calculation & Mobility Rule
- **The different formats of an IF in detail**



European Fellowships “EF”

*Between 1 and 2 years at a “European” institution (MS/AC)
4 different subschemes: “Standard” - and 3 others...*

Global Fellowships “GF”

max. 3 years – starting outside “Europe” with an institution located in a third country (TC), followed by a return phase in Europe (MS/AC)

THE FIVE DIFFERENT FORMATS OF AN IF

Type of Action	Career Restart panel [MSCA-IF-EF-CAR]	START SUBMISSION
Topic	Individual Fellowships - MSCA-IF-2017	
Type of Action	Reintegration panel [MSCA-IF-EF-RI]	START SUBMISSION
Topic	Individual Fellowships - MSCA-IF-2017	
Type of Action	Society and Enterprise panel [MSCA-IF-EF-SE]	START SUBMISSION
Topic	Individual Fellowships - MSCA-IF-2017	
Type of Action	Standard EF [MSCA-IF-EF-ST]	START SUBMISSION
Topic	Individual Fellowships - MSCA-IF-2017	
Type of Action	Global Fellowships [MSCA-IF-GF]	START SUBMISSION
Topic	Individual Fellowships - MSCA-IF-2017	

*5 forms of
MSCA
Individual
Fellowships:
4 x EF + GF*

EUROPEAN FELLOWSHIP



- **research & training for 12-24 months in an MS/AC**
- **four different types:**
 - (1) Standard
 - (2) Career Restart: restart of research career after a break of at least 1 year
 - (3) Reintegration: researcher moves from a TC back to “Europe”*
 - (4) Society & Enterprise: fellowship at a non-academic institution
- **mobility rule (extended mobility rule):** relates to the country of the future host organisation in “Europe”: Has the fellow spent in this country more than 12 (36) months during the last 3 (5) years immediately prior deadline?
- **nationality of the fellow: irrelevant in most cases**

***! Exception:** For the EF-type “Reintegration” nationality of the fellow matters: Researcher with a nationality of a TC are only eligible for the EF-type “Reintegration”, if they have spent at least a period of 5 consecutive years with full-time research activity in a EU-MS/AC*

THE EXTENDED MOBILITY RULE



FFG

15.9.2012

15.9.2014

Call deadline
14th of
September
2017

?

Depending on the fellowship type: Where have you carried out your main activity in the last 3 (5) years prior deadline?

„spent max. 1 year during the last 3 years in the country of the future host institution“ (EF-ST, GF)
the researcher has not resided or carried out his/her main activity (work, studies etc.) for more than 12 months during the last three years before the call deadline in the country of the future host institution (beneficiary; for GF: outgoing host in TC).

„spent max. 3 years during the last 5 years in the country of the future host institution“
(Extended mobility rule for EF types CAR, RI, SE only)
the researcher has not resided or carried out his/her main activity (work, studies etc.) in the country of the future host institution (beneficiary) for more than 36 months in the 5 years before the deadline.

- **2 host organisations: 1 located in MS/AC & 1 located in TC**
- **overall duration is 24-36 months split in 2 phases**
“Outgoing phase” in a TC (12-24 months) and a
“Return phase” in an MS/AC (12 months fix)
→ during the whole fellowship, the fellow is employed by the return host
- **mobility rule:** is related to the country of the future Outgoing host organisation (TC) and the question: Has the fellow spent more than 12 months in this country during the last 3 years prior deadline?
- **nationality of the fellow is relevant:** *Researcher with a nationality of a TC can apply for a global fellowship if they have spent at least a period of 5 consecutive years with full-time research activity in a EU-MS/AC*

THE MOBILITY RULE AT A GLANCE



FFG

15.9.2012

15.9.2014

Call deadline
14th of
September
2017

?

*Depending on the
fellowship type:
Where have you
carried out your
main activity in
the last 3 (5) years
prior deadline?*

„spent max. 1 year during the last 3 years in the country of the future host institution“ (EF-ST, GF)
the researcher has not resided or carried out his/her main activity (work, studies etc.) for more than 12 months during the last three years before the call deadline in the country of the future host institution (beneficiary; for GF: outgoing host in TC).

**„spent max. 3 years during the last 5 years in the country of the future host institution“
(Extended mobility rule for EF types CAR, RI, SE only)**
the researcher has not resided or carried out his/her main activity (work, studies etc.) in the country of the future host institution (beneficiary) for more than 36 months in the 5 years before the deadline.

Thematic Panels (EF Standard & GF)

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

Multidisciplinary Panels (for the specific European fellowships)

- Re-Integration (RI)
- Career Restart (CAR)
- Society & Enterprise (SE) – **new in WP 2016-2017!**

THE PERFECT MATCH FOR YOUR NEXT CAREER STEP



FFG

Keep in mind:
The IF is a personalized
research & training
project to support you to
develop your career
**YOU & your career
aims**

... with the
support of the
ideal host(s) for
your plans

The *experienced researchers* must provide a track record, and this may include, if applicable:

1. **Publications** in peer-reviewed scientific journals, peer-reviewed conference proceedings and/or monographs of their respective research fields, indicating also the number of citations (excluding self-citations) they have attracted.
2. Granted **patent(s)**.
3. **Research monographs, chapters** in collective volumes and any translations thereof.
4. **Invited presentations** to peer-reviewed, internationally established conferences and/or international advanced schools.
5. **Research expeditions** that the *experienced researcher* has led.
6. **Organisation of International conferences** in the field of the researcher (membership in the steering and/or programme committee).
7. Examples of **participation in industrial innovation**.
8. **Prizes and Awards**.
9. Funding received so far
10. Supervising, mentoring activities, if applicable.

Beneficiary X	
General Description	
Role and Commitment of key persons (supervisor)	(names, title, qualifications of the main 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 <i>experienced researcher</i>
Independent research premises?	Please explain facilities – by it? Are other entities involved? Partner Organisation Y beneficiary's research facilities are rented
Previous Involvement in Research and Training Programmes	Detail any international which the Key Persons and Expertise (supervisor)
Current involvement in Research and Training Programmes	Detail the Key Research facilities, Infrastructure and equipment
Relevant Publications and/or research/innovation products	(Max 5) Previous and Current Involvement in Research and Training Programmes
	Relevant Publications and/or research/innovation product (Max 3)

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