



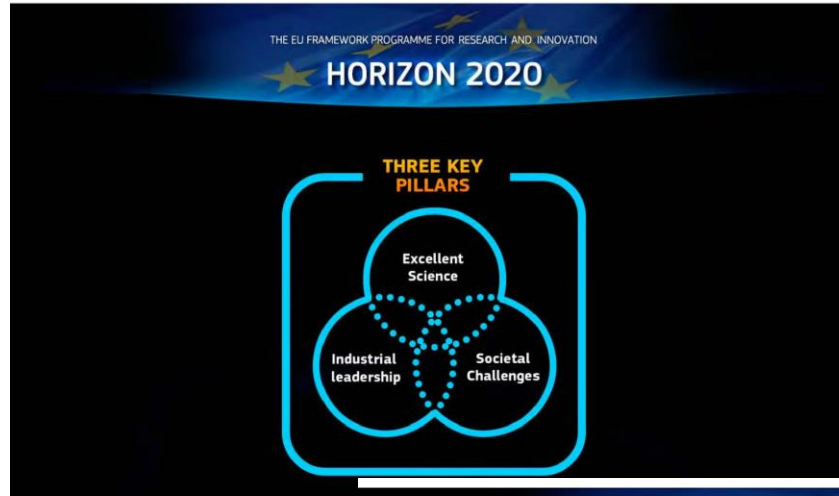
# Marie Skłodowska-Curie Actions in H2020

Work shop  
ESEIA  
2 December 2015

**Fredrik Olsson Hector**  
Research Executive Agency  
European Commission

MSCA  
Research  
Executive  
Agency

# Horizon 2020



THE EU FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

## HORIZON 2020

**HORIZON 2020**

**Budget €70 billion**

**Duration 2014-2020**

**A simpler programme**  
**Challenge based**  
**Coupling R&I**

THE EU FRAMEWORK PROGRAMME FOR RESEARCH AND INNOVATION

## HORIZON 2020

**€6162 million**

**Providing training & career development opportunities**



**Excellence**

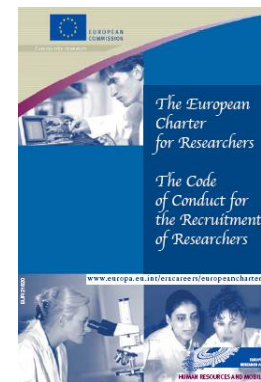
**Research**

**Training**

**Career Development**

**Skills**

**Mobility**





# MSCA main objective for H2020:

Ensure the optimum development and dynamic use of Europe's intellectual capital in order to generate new skills and innovation

**Total budget** (2014-2020): **€ 6 billion** (current prices)



# MSCA Objectives

- Attract and retain **research talent** in Europe
- Develop state-of-the-art, **innovative training schemes**, consistent with the requirements of R&I
- Promote sustainable **career development** in R&I
- Focus on **delivering new knowledge and skills**
- Back up **strong partnership with MS** via co-funding mechanism



- Open to **all domains of R&I** from **basic to market**
- Entirely bottom-up
- Participation of **non-academic sector** strongly encouraged
- **Mobility** key requirement - funding condition: participants move
- Promotion of **attractive working and employment conditions**
- Particular attention to **gender** balance
- **Public engagement** of supported researchers

# Who, what and where?



**Who? All levels** of research experience

**What? All areas** of research - bottom-up approach

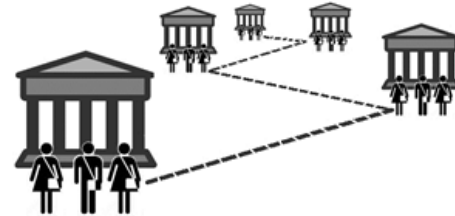
**Where? Anywhere:** any research performing organisation, public or private worldwide - there are actions for European and international mobility

**EU contribution based on unit costs** calculated on the basis of the number of researcher-months:

- *Allowances for researcher (living, mobility and family)*
- *Unit costs for research, training and networking*
- *Unit costs for management and overheads*



**IF**  
Individual Fellowships



**RISE**  
Research and Innovation  
Staff Exchange



**ITN**  
Innovative Training  
Networks



**COFUND**



# MSCA in H2020

## A closer look at

- Individual fellowships
- Innovative Training Networks
- Research and Innovation Staff Exchange



European  
Commission

# Individual Fellowship





## IF- Individual Fellowship:

Post-doctoral fellowships for outstanding researchers

**Mono-beneficiary** project

Only for **experienced researchers**

- In possession of a doctoral degree, or have 4 years of full-time research experience at the time of the call deadline
- Two types depending on the mobility of the researcher

Within Europe - **European Fellowships**

Outside Europe - **Global Fellowships**



## Objective:

- **enhance** the creative and innovative **potential** of experienced researchers
- provide opportunities **to acquire new knowledge**, work on research projects in a European context or outside Europe,
- **resume a career** or **return to Europe** - Career Restart Panel and Reintegration Panel



- **Duration** of projects: 2 years (IF Global: 3 years)
- Support to experienced researchers of **any nationality**
- International mobility within or into Member States (MS) and Associated Countries (AC)
- **Experienced researchers** only
- Focus on **career development**, not necessarily experience
- Additional 3 or 6 month **secondment option**, within Europe & in another sector



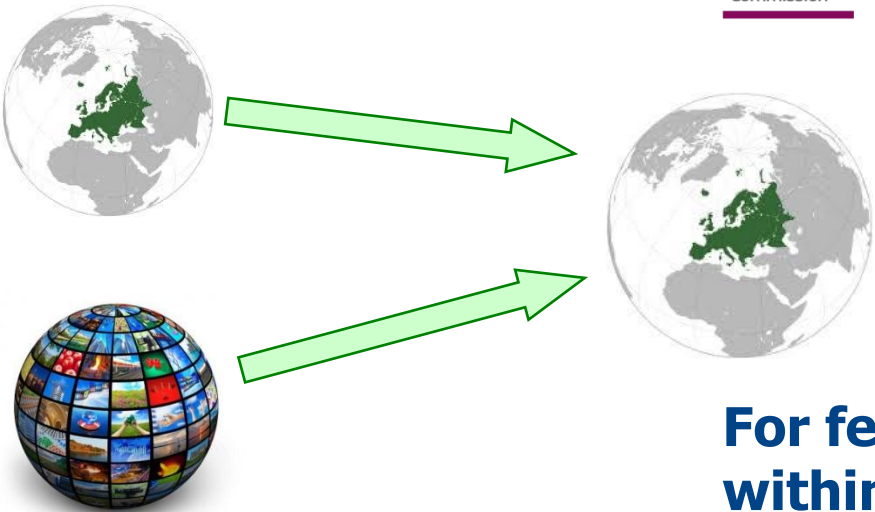
## European Fellowships Standard Scientific Panel

Career Restart Panel

Reintegration Panel

## Global Fellowships

# IF – Individual Fellowship



European Fellowships

**For fellows coming to or moving within Europe (12-24 months)**

**NB: Any Experienced Researcher may submit only one proposal to this call for proposals.**

Global Fellowships



**For fellows from Europe going to Third Countries (12-24 months) and returning (12 months)**



## European Fellowships

- **Duration** of projects: **1-2 years**
- International mobility **within or into** Europe (Member States (MS) and Associated Countries (AC))
- Experienced researchers of **any nationality**
- Applicants must not have resided or carried out their main activity in the country of the host organisation for more than 12 months in the 3 years immediately prior to the call.





## European Fellowships, Reintegration (RE) & Career restart Panels (CAR)

- **RE:** International mobility **into** Europe (Member States (MS) and Associated Countries (AC))
- **RE:** Experienced researchers with MS/AC nationality or long-term residents
- **CAR & RE: Relaxed mobility rule:** Applicant must not have resided or carried out their main activity in the country of the host organisation for more than 3 years in the 5 years immediately prior to the call.
- **CAR:** Applicant must **not** have been **active in research** for more than **12 months** prior to call deadline.



## Global Fellowships

- **Duration** of projects: **2-3 years**
- International mobility from Europe (Member States (MS) and Associated Countries (AC)) **to a "non-European" country** (third country, for 1-2 y) **and mandatory return to Europe** (for 1y)
- Experienced researchers with MS/AC nationality or long-term residents
- Mobility rule: Must not have resided or carried out their main activity in the **country of the 3rd country organisation** for more than 12 months in the 3 years immediately prior to the call deadline

# IF – overview



INDIVIDUAL FELLOWSHIPS		EUROPEAN			GLOBAL
		Scientific	CAR	REINTEGRATION	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From OTC to MS or AC	From ANY country to OTC
		< 12 months in the last 3 years	< 36 months in the last 5 years	< 36 months in the last 5 years	< 12 months in the last 3 years
	Career break in research	-	≥ 12 months prior to call deadline	-	-
PARTICIPANTS	Beneficiary	MS or AC	MS or AC	MS or AC	MS or AC
	Partner Organisation	MS or AC (secondments)	MS or AC (secondments)	MS or AC (secondments)	<b>OTC (outgoing phase)</b>
MS or AC (secondments)					
DURATION months		12 - 24	12 - 24	12 - 24	12 to 24 + 12
SCIENTIFIC PANELS		8	8	8	8
RANKING LIST		8	1	1	8
BUDGET: €215 million		€ 188 million			€ 27 million



	Researcher unit cost [person/month]			Institutional unit cost [person/month]	
	Living allowance*	Mobility allowance	Family allowance	Research, training & networking costs	Management & overheads
<b>Individual Fellowships</b>	<b>4 650</b>	<b>600</b>	<b>500</b>	<b>800</b>	<b>650</b>

# Innovative Training Networks ITN





- Main EU programme for structured **doctoral training**
- Dedicated to **early-stage researchers** (no experienced researcher recruitment)
- Involving **wide partnership of institutions** from academic and non-academic sectors
- 3 modes:
  - **ETN (European Training Networks)**
  - **EID (European Industrial Doctorates)**
  - **EJD (European Joint Doctorates)**
- Combining scientific excellence with innovation-oriented approach
- Developing entrepreneurship and skills matching research labour market needs
- Enhancing employability of researchers
- Strong involvement of **commercial entities in training**





- Consortium applies for funding
  - consortium then recruits the researchers
- Employment contracts with full social security
- All projects publish their vacancies on EURAXES
  - automatically in *NatureJobs*
- Duration of projects: 4 years
- Consortium agreement: required only for EID, for others recommended
- Support to early-stage researchers only
- Fellowships of 3-36 months (normally 36 months)
- Maximum 540 researcher-months per consortium (180 for EID with 2 partners)



## ETN - European Training Networks

- at least 3 beneficiaries from 3 different EU MS or AC. Above this minimum any country can participate

## EID - European Industrial Doctorates

- at least 2 beneficiaries established in 2 different MS or AC.
- At least one beneficiary must be entitled to award doctoral degrees and at least one beneficiary must come from the non-academic sector, primarily enterprise.
- Each researcher - enrolled in a doctoral programme and spend at least 50% in the non-academic sector.
- The joint supervision of fellows by supervisors from each sector is mandatory.

## EJD - European Joint Doctorates

- at least 3 beneficiaries from different EU MS or AC which are entitled to award doctoral degrees.
- creation of joint doctoral programmes, leading to the delivery of joint, double or multiple doctoral degrees.





## EJD

- A **joint degree** refers to a single diploma issued by at least two higher education institutions offering an integrated programme and recognised officially in the countries where the degree-awarding institutions are located.
- A **double or multiple degree** refers to two or more separate national diplomas issued by two or more higher education institutions and recognised officially in the countries where the degree-awarding institutions are located.



## Beneficiaries

*Sign the Grant Agreement and **claim costs***

*Are responsible for the execution of the programme*

## Partner Organisations

*Do not sign the Grant Agreement and do not claim costs*

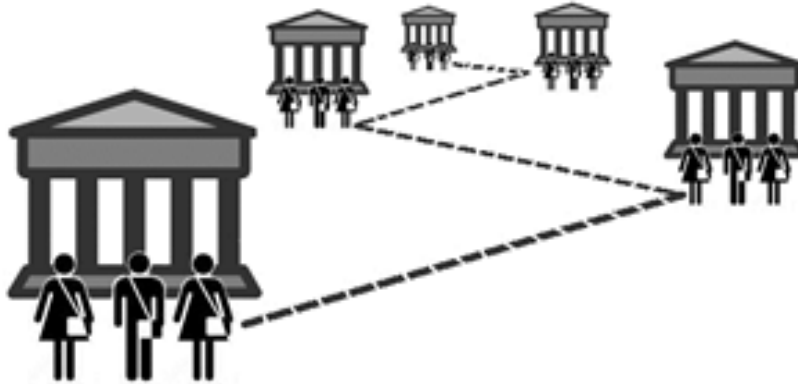
*Must include a **letter of commitment** in the proposal*

# ITN – Financial



	Researcher unit cost [person/month]			Institutional unit cost [person/month]	
	Living allowance*	Mobility allowance	Family allowance	Research, training & networking costs	Management & overheads
<b>ITN</b>	<b>3 110</b>	<b>600</b>	<b>500</b>	<b>1 800</b>	<b>1 200</b>

# Research and Innovation Staff Exchange RISE





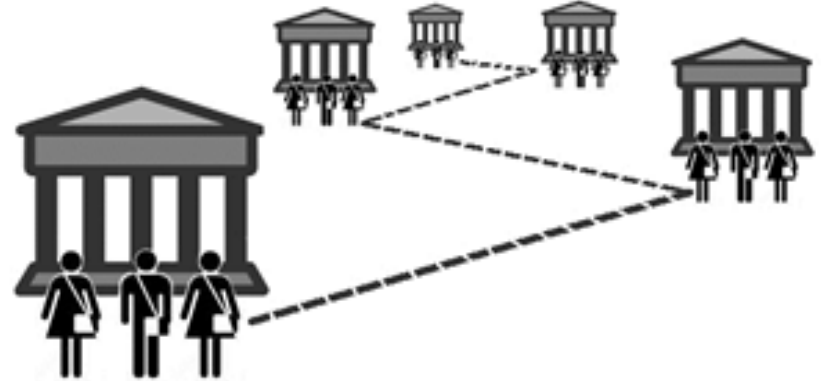
European  
Commission

# MSCA in H2020



**IF**

Individual Fellowships



**RISE**

Research and Innovation  
Staff Exchange



**ITN**

Innovative Training Networks



**COFUND**

# Research & Innovation Staff Exchange (RISE)

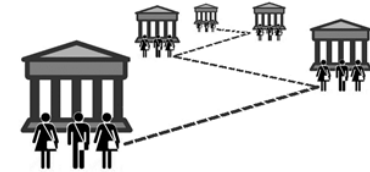


- New type of exchange of staff action to stimulate **transfer of knowledge**
- **Academic and non academic** participants (business-academia)
- Flexible inter-sector (within Europe) and international (with 3rd countries) exchange of highly skilled research and innovation staff members
- No recruitment foreseen
- Based on a common project on research and innovation
- Bottom up approach, 8 evaluation panels

# The RISE scheme supports 2 possible dimensions



*projects promoting staff exchanges between:*

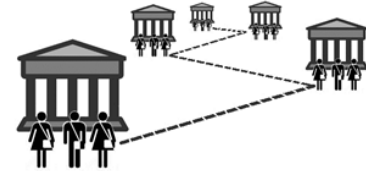


- **MS/AC and TC (international)**



- **Intra european (MS/AC) inter-sectoral (academic and non-academic sectors)**



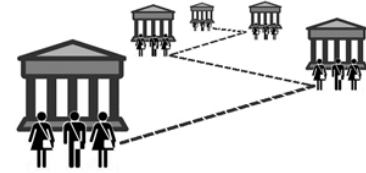


- **All Countries** can participate in RISE, but **not all are eligible for funding**

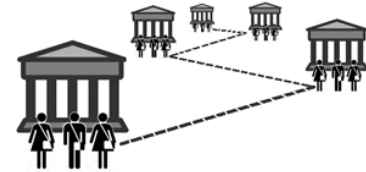
- **All institutions** fulfilling the requirements of the *Horizon 2020 Rules for Participation* can participate in RISE



# Project Main Aspects



- Project built on **joint** research and innovation activities
- Project implemented through the **secondment of staff** (no recruitments)
- **Each staff** member seconded for a period of **1 to 12** months
- The **maximum** size for a project is **540** person months
- **No minimum** size explicitly defined for the project, but substantial impact is expected
- Maximum project duration is **4 years**

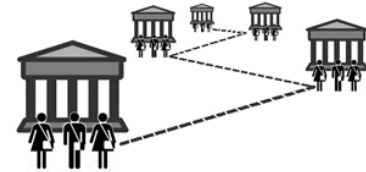


## - Beneficiaries

- Sign the Grant Agreement and claim costs
- Are responsible for the execution of the programme
- Are established in a Member State/Associated Country

## - Partner Organisations

- Do not sign the Grant Agreement and do not claim costs
- Must include a letter of commitment in the proposal
- Are established in a Third Country (i.e. neither MS nor AC)



The sector of an organisation is defined automatically

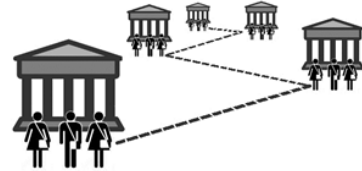
## - Academic Sector

- Higher education establishments (public or private)
- Non-profit research organisations (public or private)
- International European interest organisations

## - Non-Academic Sector

- Any socio-economic actor not included in the academic sector and fulfilling the requirements of the *Horizon 2020 Rules for Participation* (typical examples: multinationals, NGOs, museums, etc.)

# Staff Members



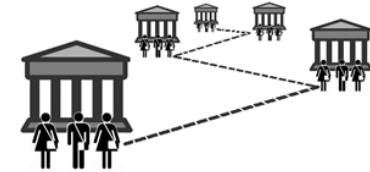
- Actively engaged in or linked to research/innovation activities for at least **6 months** prior to first secondment

- Types of staff members:

- **ESR** (no PhD and < 4 years experience)
- **ER** (PhD or > 4 years experience)
- **Managerial** staff
- **Administrative or Technical** staff

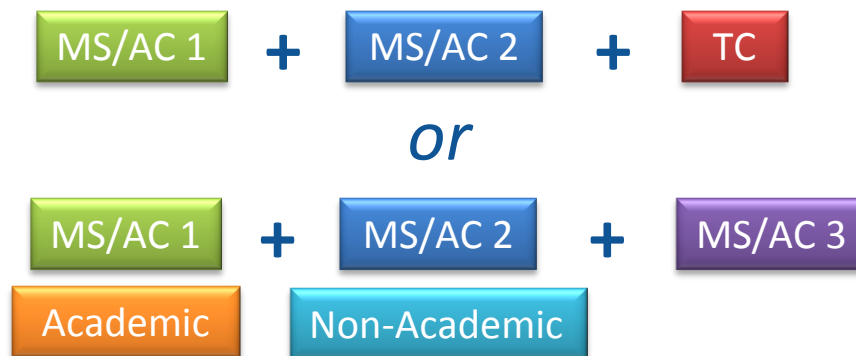
- In-built **return** mechanism

# Minimum Eligibility Conditions

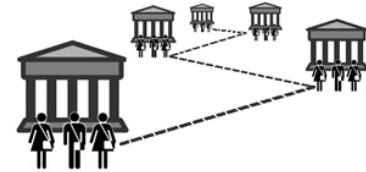


- At least **3 independent participants** in 3 different countries.  
(At least 2 participants from **2 different MS/AC**)
- **If all in MS/AC**: at least 1 academic and 1 non-academic

*In practice, 2 possible minimum settings:*

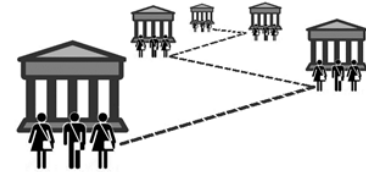


# Countries Eligible For EU Funding



- EU Member States
- Overseas Countries and Territories linked to the MS  
(As defined on page 3 of *General Annex A to the Horizon 2020 Work Programme 2014-2015*)
- Horizon 2020 Associated Countries  
(In principle, the same as FP7, but subject to the adoption of the association agreements)
- The Third Countries listed  
(On page 3 of **General Annex A** to the *Horizon 2020 Work Programme 2014-2015*)

# Countries Not Eligible For EU Funding

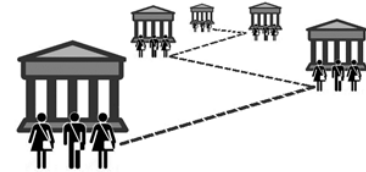


## Countries not listed previously are not eligible for EU funding

*In practice, those countries are mainly:* Australia, Brazil, Canada, China, India, Japan, Mexico, New Zealand, Republic of Korea, Russia, United States.

In very exceptional cases, partners from those countries might be funded. But the following conditions have to be fulfilled:

- a) This partner has competences/expertise that no organisation in MS/AC has
- b) The relevant transfer of knowledge can only be done via a secondment in the direction TC → MS/AC
- c) Points a) and b) must be endorsed by the expert evaluators
- d) The experts' endorsement (point c) must be confirmed by the REA



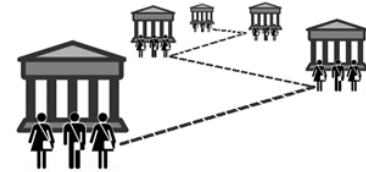
## Unit costs per researcher per month of secondment

### For secondments eligible for funding

Marie Skłodowska-Curie Action	Staff member unit cost * <i>person/month</i>	Institutional unit cost * <i>person/month</i>	
		Research, training and networking costs	Management and indirect costs
Research and Innovation Staff Exchange	2 000	1 800	700

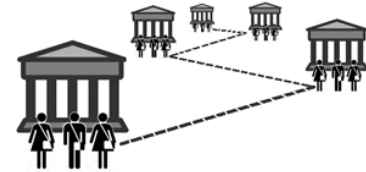
\*These unit costs are subject to a funding rate of 100% and no country coefficients apply.





The **Staff member unit cost** is intended to support the **travel, accommodation and subsistence costs** linked to the respective secondments. Participants are expected to **continue paying the salary** of the seconded staff during the period of exchange.

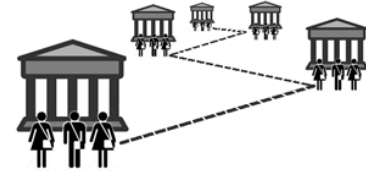
*Ensure that the EU contribution is **fully used** for the benefit of the **seconded staff** members.*



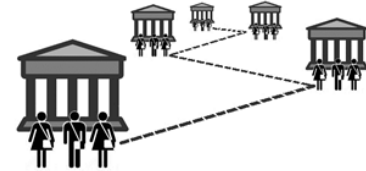
It can be:

**paid directly** to the seconded staff member or  
**managed centrally** by the beneficiary  
according to the specific needs of the  
secondment.

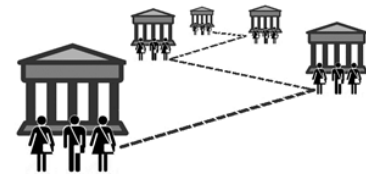
**Detailed arrangements** for the use of the  
contribution may also be agreed internally  
between beneficiaries and partner organisations,  
to **address the specific financial needs of  
each secondment.**



The ***Research, training and networking costs*** cover the costs of research and innovation related activities of the project such as purchasing of consumables, laboratory costs, participation to conferences, workshops, coordination and review meetings, and networking activities.



***Management and indirect costs*** cover all general costs connected with the organisation and implementation of the secondments (administrative and financial management, logistics, ethics, human resources, legal advice, documentation, etc.).



# ***Statistics from RISE 2014***



# Some examples from RISE 2014

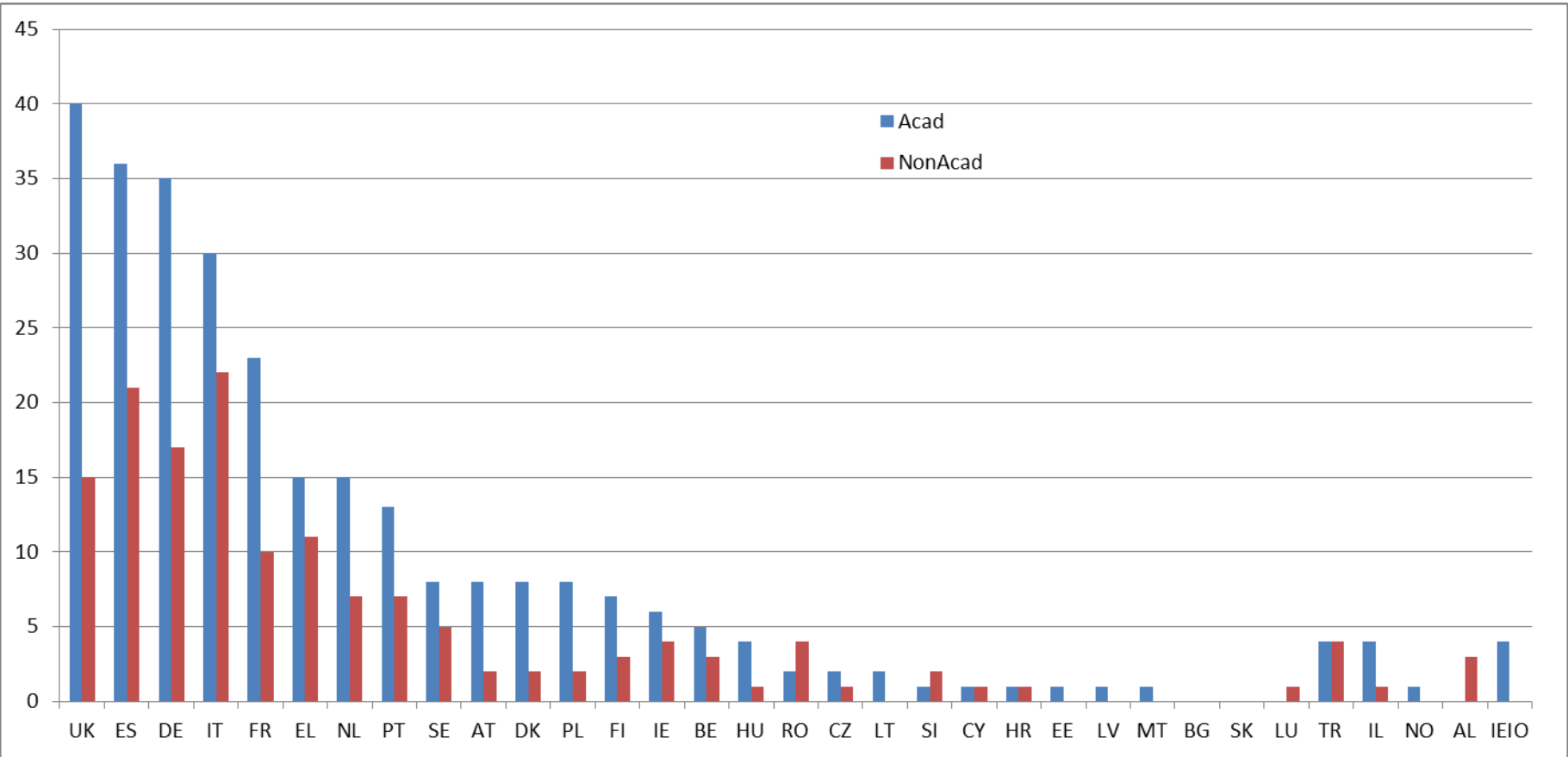
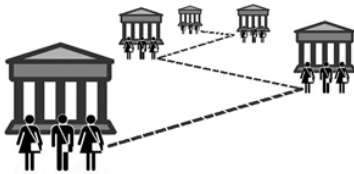


	Average	MAX	MIN
EC Contribution	783.933	2.430.000	144.000
N. Secondments	174	540	32
Duration	2,3	12	1
Participants	7	24	3

# Participants



# MS AC IEIO



# Participants



# Third Country

