

INFO SESSION ON MSCA 2017: an «expert»'s point of view

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Experts for MSCA evaluations

- ◆ <http://ec.europa.eu/research/participants/portal/desktop/en/experts/index.html>
- ◆ Must be an «expert» in a relevant field (in higher education or private sector)
- ◆ Must register in EU database
- ◆ If selected, must declare any Conflict of Interest issues
- ◆ Guiding principles: Independence, impartiality, objectivity, accuracy, consistency

The evaluation process

- ♦ Allocation of experts (REA, Chairs, VCs): match proposals with evaluators's expertise
- ♦ Remote Individual Evaluations (Experts, assisted by VCs)
- ♦ Remote Consensus Phase (Experts, assisted by VCs): all experts now see each other's comments and scores; they discuss and reach consensus on comments and scores
- ♦ Panel Meeting in Brussels (REA, Chairs, VCs): Quality check, ex-aequos, etc...

The evaluation process

Guiding principles

- ***Independence***
 - You are evaluating in a personal capacity
 - You represent neither your employer, nor your country!
- ***Impartiality***
 - You must treat all proposals equally and evaluate them impartially on their merits, irrespective of their origin or the identity of the applicants
- ***Objectivity***
 - You evaluate each proposal as submitted; meaning on its own merit, not its potential if certain changes were to be made
- ***Accuracy***
 - You make your judgment against the official evaluation criteria and the call or topic the proposal addresses, and nothing else
- ***Consistency***
 - You apply the same standard of judgment to all proposals

Guide for Applicants

- ♦ http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-if_en.pdf
- ♦ Contains **ALL** the **IMPORTANT** and **NECESSARY** information!
- ♦ Read it **COMPLETELY** and **CAREFULLY**
- ♦ **USE IT!!!**

Eligibility

- ♦ Read carefully the eligibility criteria!
- ♦ **EVERYTHING IS CHECKED BY REA AND BY THE EXPERTS!**
- ♦ If not eligible, proposal is not evaluated!

EF, GF, CAR, RI, SE

- ♦ **EF**: Standard european fellowship
- ♦ **CAR**: Career restart
- ♦ **RI**: Reintegration
- ♦ **SE**: Society and enterprise
- ♦ **GF**: Global fellowship
- ♦ Different schemes, different eligibility criteria, different evaluation criteria!
- ♦ Choose carefully where to apply!

IF, GF, CAR, RI, SE

INDIVIDUAL FELLOWSHIPS		EUROPEAN (EF)				GLOBAL
		ST	CAR	RI	SE	GF
EXPERIENCED RESEARCHERS	Nationality	ANY	ANY	MS, AC or long-term residents	ANY	MS, AC or long-term residents
	Mobility	From ANY country to MS or AC	From ANY country to MS or AC	From TC directly to MS or AC <i>(location of the host institution)</i>	From ANY country to MS or AC	From ANY country to TC then to MS/AC
		≤ 12 months in the last 3 years	≤ 36 months in the last 5 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 Non-academic only	MS or AC
	Entity with a capital or legal link	MS or AC	MS or AC	MS or AC	MS or AC Non-academic only	MS or AC
	Partner Organisation	MS or AC	MS or AC	MS or AC	MS or AC (both academic and non-academic)	Outgoing phase (mandatory): TC Secondment (optional): MS or AC
DURATION (months)		12 to 24	12 to 24	12 to 24	12 to 24	12 to 24 + 12
SCIENTIFIC AREAS		8	8	8	8	8
NUMBER OF RANKING LISTS		8	1	1	1	8
BUDGET (total EUR 248.7 million)		EUR 205 million			EUR 10 million	EUR 33.70 million

♦ Panels:
PHY
CHE
MATH
SOC
ENG
ENV
LIFE
ECO

Only 1 ranking list

Proposals

- ♦ **Follow the guidelines from the Guide for Applicants!**
- ♦ **Address EVERY criteria and sub-criteria!**
- ♦ Explain everything in your proposal (**experts evaluate each proposal as submitted**) - even «negative» events such as a small break in your career (maternity leave, sickness, failure to get a job, etc...), a drop in your publication rate (can be due to lots of reasons), any unusual circumstances...: the experts are humans!

Evaluation criteria

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 potential and future career prospects of the researcher	Coherence and effectiveness of the work plan
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 allocation of tasks and resources
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 management structure and procedures , including risk management
Capacity of the researcher to reach or re-enforce a position of professional maturity/independence		Appropriateness of the institutional environment (infrastructure)
50%	30%	20%
Weighing		
1	2	3
Priority in case of <i>ex aequo</i>		

Experts are asked to evaluate every **CRITERIA**

and **SUB-CRITERIA**

Slightly different for the different schemes

Evaluation criteria

http://ec.europa.eu/research/participants/data/ref/h2020/call_ptef/ef/2016-2017/h2020-call-ef-msca-if-2016-17_en.pdf

-----> Self-evaluation form

Ask someone else to evaluate your proposal following this form

Evaluation criteria

1. EXCELLENCE

The following aspects will be considered when assigning an overall score for this criterion:

- Quality and credibility of the research/innovation action** (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects)
- Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**
- Quality of the supervision and of the integration in the team/institution**
- Capacity of the researcher to reach or re-enforce a position of professional maturity/independence**

Strengths of the proposal (in bullet point format):

-
-
-

Weaknesses of the proposal (in bullet point format):

-
-
-

Overall comments:

(reflecting the relative importance of the above-mentioned strengths and weaknesses)

-
-
-

Score Criterion 1
(out of 5):

→ only if it concerns the
research topic

Evaluation criteria

1. EXCELLENCE

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- Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**
- Quality of the supervision and of the integration in the team/institution**
- Capacity of the researcher to reach or re-enforce a position of professional maturity/independence**

The training
(supervisor towards
applicant) **MUST** be
described in detail

The applicant must learn something
NEW and he/she must be able to
transfer his knowledge to the host
lab as well

Evaluation criteria

1. EXCELLENCE

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- Quality and credibility of the research/innovation action** (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects)
- Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**
- Quality of the supervision and of the integration in the team/institution**
- Capacity of the researcher to reach or re-enforce a position of professional maturity/independence**

concerns the supervision,
not the supervisors!!!

----> how will the researcher and the supervisor interact, frequency of meetings,...

Integration in the research team/
department

----> how will the applicant interact with the other researchers, technicians, etc... in the team

Evaluation criteria

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- Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**
- Quality of the supervision and of the integration in the team/institution**
- Capacity of the researcher to reach or re-enforce a position of professional maturity/independence**

The most difficult and somewhat subjective sub-criterion to evaluate from the expert's point of view. Mostly based on the CV of the researcher, on whether this project will broaden his research experience, on whether he/she will be given the opportunity to gain independence and leadership skills

Evaluation criteria

The CV should give useful information...

e.g.: a list of publications is useless if the personal contribution of the applicant is not described.

Should provide explanations for any unusual situation.

Should describe your previous experience, also in terms of outreach etc... (to assess if the actions proposed are realistic)

Evaluation criteria

2. IMPACT

~~The following aspects will be considered when assigning an overall score for this criterion:~~

- Enhancing the potential and future career prospects of the researcher**
- Quality of the proposed measures to exploit and disseminate the action results**
- Quality of the proposed measures to communicate the action activities to different target audiences**

**Very important: NEW SKILLS
SHOULD BE ACQUIRED**

**Should lead to improved
EMPLOYABILITY**

Evaluation criteria

2. IMPACT

The following aspects will be considered when assigning an overall score for this criterion:

- ~~Enhancing the potential and future career prospects of the researcher~~
- Quality of the proposed measures to exploit and disseminate the action results**
- Quality of the proposed measures to communicate the action activities to different target audiences**

Be as detailed and as precise as possible
.....but not unrealistic!

Publications: scientific papers, books, etc...

Internet: web page, databases, open access repositories, ...

Conferences: national, international, ...

Patents: if applicable

Social media

ETC.....

Evaluation criteria

2. IMPACT

The following aspects will be considered when assigning an overall score for this criterion:

- Enhancing the potential and future career prospects of the researcher
- Quality of the proposed measures to exploit and disseminate the action results
- Quality of the proposed measures to communicate the action activities to different target audiences

Examples of target audiences: scientists, industries, children, general public, students, etc...

Be inventive, creative, imaginative ... but realistic!

Use the social media

DO NOT simply propose to participate in existing activities at the host!!!

Evaluation criteria

3. IMPLEMENTATION

~~The following aspects will be considered when assigning an overall score for this criterion:~~

- Coherence and effectiveness of the work plan**
- Appropriateness of the allocation of **tasks and resources**
- Appropriateness of the management structures and procedures**, including risk management
- Appropriateness of the institutional environment** (infrastructure)

Strangely, very often missing or incomplete...

Include, if appropriate, milestones, deliverables,
timeline, ...

Evaluation criteria

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The following aspects will be considered when assigning an overall score for this criterion:

- Coherence and effectiveness of the work plan**
- Appropriateness of the allocation of tasks and resources**
- Appropriateness of the management structures and procedures, including risk management**
- Appropriateness of the institutional environment (infrastructure)**

The distribution of tasks in the project, between the applicant and his co-workers, should be very clearly described.

Resources include (as needed): financial, lab equipment, technicians, computer time (CPU access), etc...

Evaluation criteria

3. IMPLEMENTATION

The following aspects will be considered when assigning an overall score for this criterion:

- Coherence and effectiveness of the work plan
- Appropriateness of the allocation of tasks and resources
- Appropriateness of the management structures and procedures, including risk management
- Appropriateness of the institutional environment (infrastructure)

Usually ok

VERY IMPORTANT, often missing or incomplete

Identify ALL the risks (human, scientific, equipment,...)

Propose adequate measures/solutions; project should remain excellent if need to go to plan B or C.

Evaluation criteria

3. IMPLEMENTATION

The following aspects will be considered when assigning an overall score for this criterion:

- Coherence and effectiveness of the work plan**
- Appropriateness of the allocation of tasks and resources**
- Appropriateness of the management structures and procedures, including risk management**
- Appropriateness of the institutional environment (infrastructure)**

Proposal is evaluated «as such»:
Even if host is well known, infrastructures AS
THEY RELATE TO THE PROJECT should be
described

Re-submissions

- ◆ Do not simply re-submit last year's proposal!
- ◆ Different call => different eligibility criteria, slightly different evaluation criteria,...
- ◆ UPDATE CV and research project !!!!!

- ◆ Proposals are evaluated criteria per criteria, not just on the scientific quality of the research project or on the applicant's CV
- ◆ The project should never be a «simple continuation of the applicant's current project», even if going to an excellent institution or facility: it should increase the future employability of the applicant by broadening his research experience, and by providing him with new skills.

AGAIN:

Guide for Applicants

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- ◆ Contains **ALL** the **IMPORTANT** and **NECESSARY** information!
- ◆ Read it **COMPLETELY** and **CAREFULLY**
- ◆ **USE IT!!!**