

MSCA-NET  
STAFF EXCHANGES HANDBOOK  
CALL 2022  
Deliverable 3.8

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NETWORK OF THE MARIE SKŁODOWSKA-CURIE ACTIONS NATIONAL CONTACT POINTS

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Task 3.4	Handbooks
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## History of changes

Version	Date	Change	Page
V2 2023	14/2/2023	<b>MSCA Staff Exchanges essentials</b>	
		- Clarification on intersectoral secondments.....	2
		- Clarification of the Letter of commitment .....	3
		- Partnership agreement – deleted sentence “The PA must comply with the Grant Agreement” .....	3
		- Included Plan for the exploitation and dissemination of results including communication activities .....	3
		<b>Proposal template</b>	
		- Tags are removed through proposal template .....	10 – 38
- Chapter 1.1. deleted double stated weakness “ <i>The research and innovation objectives are defined only in broad terms, without going into detail about possible measurable outcomes for the individual goals.</i> ” .....	11		
- Implementation – updated deliverable <i>Plan for the dissemination and exploitation of results, including communication activities</i> with relevant MSCA Work programme 2021 – 2022 wording. ....	34		

## Table of Contents

<b>Abbreviations</b> .....	<b>0</b>
<b>Disclaimer</b> .....	<b>1</b>
<b>Acknowledgements</b> .....	<b>1</b>
<b>How to use the Handbook</b> .....	<b>1</b>
<b>MSCA Staff Exchanges essentials</b> .....	<b>2</b>
<b>Key tips for proposal template and layout</b> .....	<b>4</b>
<b>Definitions and key aspects</b> .....	<b>7</b>
1. <b>Excellence</b> .....	<b>10</b>
2. <b>Impact</b> .....	<b>20</b>
3. <b>Quality and Efficiency of the Implementation</b> .....	<b>30</b>
4. <b>Participating Organisations</b> .....	<b>38</b>
5. <b>Letters of Commitment</b> .....	<b>41</b>
5.1 <b>Template of Commitment letter for associated partners</b> .....	<b>42</b>
<b>Additional ethics information</b> .....	<b>43</b>

## Abbreviations

AC – Horizon Europe Associated Country  
CA – Consortium Agreement  
EC – European Commission  
FAQ – Frequently asked questions  
GA – Grant Agreement  
GfA – Guide for Applicants  
HE – Horizon Europe programme  
MS – Member States  
MSCA – Marie Skłodowska-Curie Actions  
NCP – National Contact Point  
PA – Partnership Agreement  
PIC - Participant Identification Code  
REA – European Research Executive Agency  
SE – Staff Exchanges

## Disclaimer

This Handbook is an UNOFFICIAL document prepared by MSCA-NET, the EU-funded project of National Contact Points (NCP) for the Marie Skłodowska-Curie Actions (MSCA). It is the continuation of the MSCA Handbooks prepared within the Net4Mobility+ project by the Irish Universities Association.

The information contained in this document is intended to assist and support, unofficially and practically, anyone submitting a proposal to the MSCA Staff Exchanges Call with the deadline of 8 March 2023. This document is not, by any means, a substitute for official documents published by the European Commission, which in all cases must be considered binding. As such, this document is to be used in addition to the official call documents: [MSCA Work Programme 2021-2022](#), [Guide for Applicants for Staff Exchanges 2022](#), and official FAQs prepared by the European Research Executive Agency (REA).

This document may not be considered in any way as deriving from and/or representing the views and policies of the European Commission (EC) and the REA. Likewise, it may not be considered as a document deriving from and/or representing the views and policies of the entities that are beneficiaries of the MSCA-NET project.

Please note that this document is susceptible to data corruption, unauthorized amendment, and interception by unauthorized third parties for which we accept no liability.

It is the responsibility of the applicant to remain aware of any updates and to use the latest version of the official call documents should they be published after the publication of this document.

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## Acknowledgements

We thank our NCPs colleagues, task members from the MSCA-NET project and the EC / REA Staff for checking the document, as well as the External Experts/ Scientists who have acted as Evaluators for past calls and have provided valuable insights.

## How to use the Handbook

This Handbook should be used in conjunction with the [MSCA Work Programme 2021 – 2022, Guide for Applicants, official FAQs](#) and proposal templates, and [Standard application form \(HE MSCA SE\)](#), downloaded from the call webpage on the [Funding & Tender Opportunities Portal](#). Please note that the information in this Handbook complements the information contained in the template for Part B of the proposal.

- ✓ Information from the original Part B proposal is written in black Times New Roman font.
- ✓ Additional suggestions & information for each section of the proposal (Parts B1 and B2) are written in blue bullets and **Calibri font**.
- ✓ Tables with the top 5 strengths and weaknesses of each sub-criterion illustrate comments by evaluators in previous Evaluation Summary Reports.

## MSCA Staff Exchanges essentials

Before you begin preparing your proposal, please ensure you are aware of the following facts and comply with the requested requirements:

<b>MSCA SE DEADLINE</b>	<ul style="list-style-type: none"> <li>❖ <b>08 March 2023, 17:00 Brussels time</b></li> <li>❖ You can submit your application at any time before the deadline. Once submitted you can reopen, edit and resubmit your proposal as many times as required before the call deadline. Only the last submitted version of the proposal will be evaluated. Please start early!</li> </ul>
<b>CONSORTIUM REQUIREMENTS</b>	<ul style="list-style-type: none"> <li>❖ At least three (3) independent legal entities in three different countries, two (2) of which established in a different EU Member State (MS) or Horizon Europe Associated Country (AC). Above this minimum, the consortium may include other legal entities, including International European Research Organisation (IERO) and entities from Third Countries (TC) under the conditions provided by the Horizon Europe Rules for Participation (for more details see the <a href="#">Horizon Europe Programme Guide</a>).</li> <li>❖ For Staff Exchanges, only legal entities established in EU Member States (MS) or Horizon Europe Associated Countries (AC) can be beneficiaries.</li> </ul>
<b>ELIGIBLE SECONDMENTS</b>	<ul style="list-style-type: none"> <li>❖ Secondments between institutions established in different EU Member States (MS) or Horizon Europe Associated Countries (AC) with institutions established in different non-associated Third Countries, EU MS or ACs.</li> <li>❖ Secondments between organisations within MS and AC should mainly be inter-sectoral (academic/non-academic sector); same-sector exchanges are also possible only if they are interdisciplinary (to a maximum 1/3 of total implemented secondments eligible for funding). Secondments must always be between different countries.</li> </ul>
<b>RESUBMISSION</b>	<ul style="list-style-type: none"> <li>❖ If you intend to re-submit a proposal, you must indicate re-submission in Part A of the project proposal, including the reference number of the previously submitted proposal.</li> </ul>

Upon fulfilling requirements for this call, make sure you have also prepared the following:

<b>CONSORTIUM AGREEMENT</b>	<ul style="list-style-type: none"> <li>❖ During the preparation of the proposal, the coordinator should start negotiations and communications with the other beneficiaries on the main terms of the consortium: project implementation, internal organisation and management, project budget and distribution of EU funding, additional IP rules, rights and obligation of consortium partners, etc. You will also need to address how the consortium has agreed to manage IP under section 2.3. (The Strategy for the management of intellectual property, foreseen protection measures, etc.)</li> <li>❖ In most cases, the Consortium Agreement (CA) is signed before the signature of the Grant Agreement (GA) and should complement the GA but must not contain any provision contrary to it or the Work Programme.</li> </ul>
<b>LETTER OF COMMITMENT</b>	<ul style="list-style-type: none"> <li>❖ All associated partners (no matter if they are from EU MS, HE AC or TC) must include a Letter of Commitment in the proposal to ensure their active participation in the proposed network/action.</li> </ul>

	<ul style="list-style-type: none"> <li>❖ Experts will disregard the contribution of any associated partners if the corresponding Letter of Commitment is not present. They will evaluate also in consequence on the 3 award criteria (implementation).</li> <li>❖ The Letter of Commitment template is available in Part B2 – 5.</li> </ul>
<p style="text-align: center;"><b>PARTNERSHIP AGREEMENT</b></p>	<ul style="list-style-type: none"> <li>❖ When associated partners are involved, the beneficiary is encouraged to sign a Partnership Agreement (PA) with them to regulate the internal relationship between all participating organisations.</li> </ul>
<p style="text-align: center;"><b>GENDER EQUALITY PLAN</b></p>	<ul style="list-style-type: none"> <li>❖ For calls with deadlines in 2023, once a project proposal is selected, consortium partners concerned by the eligibility criterion will have until the Grant Agreement signature to confirm they have a Gender Equality Plan (GEP) in place.</li> </ul>
<p style="text-align: center;"><b>PLAN FOR THE EXPLOITATION AND DISSEMINATION OF RESULTS INCLUDING COMMUNICATION ACTIVITIES</b></p>	<ul style="list-style-type: none"> <li>❖ According to the <a href="#">Horizon Europe -Work Programme 2021-2022 General Annexes, general conditions</a> (part 13, page 4) as an admissibility condition, applications must include a plan for the exploitation and dissemination of results including communication activities, <u>unless provided otherwise in the specific call conditions</u>.</li> <li>❖ If the expected exploitation of the results entails developing, creating, manufacturing and marketing a product or process, or in creating and providing a service, the plan must include a strategy for such exploitation.</li> <li>❖ If the plan provides for exploitation of the results primarily in non-associated third countries, the legal entities must explain how that exploitation is still to be considered in the EU's interest.</li> </ul>
<p style="text-align: center;"><b>REQUIRED DOCUMENTS</b></p>	<ul style="list-style-type: none"> <li>❖ Read the required documents that contain the rules and conditions for the call, the template for proposals as well as the frequently asked questions (FAQs): <ul style="list-style-type: none"> <li>✓ <a href="#">Staff Exchanges Guide for Applicants 2022</a></li> <li>✓ <a href="#">MSCA Work Programme 2021 – 2022</a></li> <li>✓ <a href="#">Specific FAQs for Staff Exchanges call</a></li> <li>✓ <a href="#">Proposal template and instructions on how to fill it in</a></li> <li>✓ <a href="#">MSCA-NET FAQs</a></li> </ul> </li> </ul>
<p style="text-align: center;"><b>FAMILIARISE YOURSELF WITH THE SUBMISSION PROCESS</b></p>	<ul style="list-style-type: none"> <li>❖ Proposals must be created and submitted on the <a href="#">Funding &amp; Tender Opportunities Portal</a> by a contact person of the coordinating organisation – using the coordinator's Participant Identification Code (PIC) number.</li> <li>❖ Proposal templates (Part B) can be downloaded once the submission has been started and a proposal profile is created on the Funding &amp; Tender Opportunities Portal.</li> <li>❖ For more details on the submission process, you can consult the <a href="#">Proposal Submission Service User Manual</a>.</li> </ul>
<p style="text-align: center;"><b>UNDERSTAND WHAT IS REQUIRED FOR THE SUBMISSION</b></p>	<ul style="list-style-type: none"> <li>❖ <b>Administrative forms (Part A)</b> Part A constitutes an integral part of your proposal; it is the part of the proposal where you will be asked for certain administrative details that will be used in the evaluation and further processing of your proposal. For more information, please refer to the <a href="#">Standard application form (HE MSCA SE)</a> (pages from 1 to 19).</li> </ul> <p>Also, in Part A, it is not required for the beneficiaries or the associated partners, to fill in the list of up to five publications, relevant previous projects, or significant infrastructure. This information however will need to be described in the relevant sections of Part B2 (Section 4 – table 7).</p>

- ❖ **Narrative Part B** is composed of two separate PDF files (Part B1 and Part B2), which must be uploaded as separate PDF files:
- ❖ **Part B1**, containing a maximum of 32 A4 pages.
  - The Start Page must consist of 1 whole page.
  - The Table of Contents must consist of 1 whole page.
  - Section 1 (Excellence) must start on page 3 of the document.
  - The core of the proposal (section 1 – Excellence, section 2 – Impact and section 3 - Implementation) must have a maximum of 30 pages.
  - Any excess pages (i.e., numerical page 33 and beyond) will not be made available to the evaluators (automatically blanked out) and therefore will not be taken into account.
- ❖ **Part B2**, with no page limit, contains
  - Section 4. Participating organisations – one table of maximum one page for each beneficiary and half a page for each associated partner.
  - Section 5. Templates of Letter of Commitment
- ❖ Bear in mind that formatting (font type and size) for part B1 must be continued for part B2.

Applicants will **NOT** be able to submit their proposal in the submission system unless both parts 1 and 2 are provided in PDF format (Adobe version 3 or higher, with embedded fonts).

You should name your part B2 documents as:

- Proposal Number-Acronym-Part B1.pdf
- Proposal Number-Acronym-Part B2.pdf

**The maximum size of each document is 10 MB.**

#### NCP SUPPORT

- ❖ You can contact your MSCA National Contact Point via <https://msca-net.eu/contact-points/>

## Key tips for proposal template and layout

The following information is important to familiarise yourself with as it will make the review process for the evaluators easier.

### 1. General points and information on Part A

- ✓ **Acronym:** Use a self-explanatory title and a memorable acronym. Don't forget that you will not be able to change the acronym once you submit your proposal on the Funding and Tenders Portal.
  - ✓ The acronym will be on your proposal, and you will refer to it throughout your communication and dissemination activities. Ensure that the acronym is short, easy to pronounce, and easy to remember by the evaluators. Please also be careful that it cannot be construed as inappropriate or have a "double meaning" in another language.
- ✓ Here is a useful tool for creating an acronym: <http://acronymcreator.net/>
- ✓ Check [http://cordis.europa.eu/projects/home\\_en.html](http://cordis.europa.eu/projects/home_en.html) to see if an EU project with the same acronym already exists. An internet search could also be used to determine if the acronym is "protected".

- ✓ **For resubmissions**, don't just use the Evaluation Summary Report (ESR) from the previous submission. Review the proposal as a whole to find room for improvement. Your new proposal is not being evaluated in comparison with the old one.
- ✓ Evaluators will have access to the previous ESR after they have evaluated the new proposal.
- ✓ Part B might change slightly from one year to another (e.g., subheadings), so please be sure that you are using the template of the 2022 MSCA SE call.
- ✓ Be aware of the overall weighting of each criterion. You need to score well in all sections to be funded.
- ✓ **Descriptors & free keywords:** In Part A, 1. General Information, choose carefully up to 5 (and at least 3) descriptors among the fixed descriptors related to your chosen evaluation panel that best characterise the subject of your proposal, **in descending order of relevance**. You can also enter any words you think give extra detail of the scope of your proposal.
  - ✓ It is important to carefully choose your descriptors as they will be used to support REA services in identifying the best qualified evaluators for your proposal (matchmaking process between the descriptors of your proposal and the descriptors of the registered evaluators' expertise).
  - ✓ Description on how to select the keywords is available on a [specific FAQ](#).

## 2. Abstract

- ✓ The abstract is a short description of your project (maximum 2000 characters including spaces).
- ✓ The main elements are:
  - 1-2 sentences that put the project into context including the joint research and innovation objective
  - Background information on the state of the art
  - Specific aims and details of how this collaborative project will deliver its research and innovation objectives through the planned secondments and staff exchanges
- ✓ Abstracts in Part A should not contain sensitive information, as they will be made publicly available if the project is funded.
- ✓ An abstract should promote your project and be understandable to the non-expert.
- ✓ It should communicate the importance, impact and timeliness of the project and also convince the evaluator that it should be funded.
- ✓ It should **NOT** be the usual scientific abstract.
- ✓ See examples of existing projects in CORDIS (using filters [Projects – H2020 – Marie Skłodowska-Curie actions Research and Innovation Staff Exchange](#))

## 3. Proposal layout

- ✓ The page size is **A4**, and all **margins** (top, bottom, left, right) should be at least **15 mm** (not including any footers or headers).



- ✓ The reference font for the body text of proposals is **Times New Roman (Windows platforms), Times/Times New Roman (Apple platforms) or Nimbus Roman No. 9 L (Linux distributions)**.
  - ✓ The use of a different font for the body text is not advised and is subject to the cumulative conditions that the font is legible and that its use does not significantly shorten the representation of the proposal in several pages compared to using the reference font (for example to bypass the page limit).
- ✓ **The minimum font size allowed is 11 points.** Standard character spacing and a minimum of single line spacing are to be used.
- ✓ Use charts, diagrams, text boxes, and figures to explain aspects of the project. Do not just use blocks of text. Don't forget to add sequential numbers and captions to the charts/diagrams/ figures/ text boxes.
- ✓ If needed, use **tables** for illustrating the core text of the proposal (**minimum font size 9**). Tables should not be used to circumvent the minimum font size indicated for the main text.
- ✓ Ensure that any colour diagrams, etc., are legible when printed (also if printed in black and white).
- ✓ Use highlighting where appropriate (bold, underline, italics) but don't overdo it!
- ✓ **Literature references should appear in the footnotes, font size 8.** All footnotes will count towards the page limit.
- ✓ Avoid hyperlinks to information that is designed to expand the proposal. Evaluators will be instructed to ignore them. Include the relevant information in your text.

#### 4. Proposal template

- ✓ Use the proposal template provided, including the exact sub-headings, because:
  - ✓ It matches the evaluation template and helps you to put the right information in the right place for the evaluators to find it.
  - ✓ Evaluators use a "checklist" approach to marking – if the information is not in the correct section, it may be a risk that can have an effect on the final evaluation score.
- ✓ The proposal acronym must be placed in a header on each page (in both, part B1 and part B2) in addition to already placed information: Call: - HORIZON-MSCA-2022-SE-01 – MSCA Staff Exchanges 2022.
- ✓ All pages should be numbered in a single series on the footer of the page to prevent errors during handling. It is recommended to apply the following numbering format: "Part B - Page X of Y".
- ✓ You should name your part B1 and part B2 as follows: Proposal Number – Acronym-Part B1.pdf / Proposal Number – Acronym – Part B2.pdf.

#### 5. Page limitations

- ✓ Part B1: Sections 1, 2 and 3 together **must not be longer than 30 pages**. With the start page, the table of contents and Part B sections 1-3, part B1 must not exceed **32 pages**.

- ✓ All tables, figures, references and any other element about these sections must be included as an integral part of these sections and they are counted towards this page limit.
- ✓ After the deadline, excess pages (in over-long proposals) will be automatically blanked, and therefore will not be taken into consideration by the evaluators.

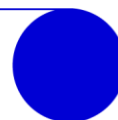
## 6. Proposal language

- ✓ The proposal should be written in English.
- ✓ Explain any abbreviations the first time you use them.
- ✓ Use simple clear text to be sure that it reads well.
- ✓ Avoid long sentences. Avoid too much repetition. Sign-post or put reference to other parts of the proposal if necessary.
- ✓ Do not copy & paste information from other documents/websites. Instead, tailor information to fit your proposal.

## Definitions and key aspects

**DISCLAIMER:** For the purpose of this MSCA SE Handbook, authors may interpret official EU definitions that are stated in the official SE call documents. Any interpretation by the authors will be indicated in blue font.

<b>DEFINITIONS</b>	
<b>Deliverable</b>	A report that is sent to the Commission or Agency providing information to ensure effective monitoring of the project. There are different types of deliverables (e.g., a report on specific activities or results, data management plans, ethics or security requirements).
<b>Impacts</b>	Wider long-term effects on society (including the environment), the economy and science, enabled by the outcomes of R&I investments (long term). Impacts generally occur sometime after the end of the project.
<b>Objectives</b>	The goals of the work performed within the project, in terms of its research and innovation content. This will be translated into the project's results. These may range from tackling specific research questions, demonstrating the feasibility of an innovation, sharing knowledge among stakeholders on specific issues. The nature of the objectives will depend on the type of action, and the scope of the topic.
<b>Outcomes</b>	The expected effects, over the medium term, of projects supported under a given topic. The results of a project should contribute to these outcomes, fostered in particular by the dissemination and exploitation measures. This may include the uptake, diffusion, deployment, and/or use of the project's results by direct target groups. Outcomes generally occur during or shortly after the end of the project.
<b>Pathway to impact</b>	Logical steps towards the achievement of the expected impacts of the project over time, in particular beyond the duration of a project. A pathway begins with the projects' results, to their dissemination, exploitation and communication, contributing to the expected outcomes in the work programme, and ultimately to the wider scientific, economic and societal impacts of the work programme destination.



	The work programme destination refers to the specific contribution of the project to the work programme’s expected impacts. Impacts generally occur sometime after the end of the project.
<b>Research output</b>	Results generated by the action to which access can be given in the form of scientific publications, data or other engineered outcomes and processes such as software, algorithms, protocols and electronic notebooks.
<b>Results</b>	What is generated during the project implementation. This may include, for example, know-how, innovative solutions, algorithms, proof of feasibility, new business models, policy recommendations, guidelines, prototypes, demonstrators, databases and datasets, trained researchers, new infrastructures, networks, etc. Most project results (inventions, scientific works, etc.) are ‘Intellectual Property’, which may, if appropriate, be protected by formal ‘Intellectual Property Rights’.

<b>ADDITIONAL DEFINITIONS and KEY ASPECTS from the EC that can be useful while preparing your Staff Exchanges project proposal</b>	
<b>Associated Partners</b>	<p>Associated Partners are entities which participate in the action but without the right to directly charge costs or claim contributions. They contribute to the implementation of the action (training and/or hosting seconded staff) but do not sign the Grant Agreement.</p> <p>For the Staff Exchanges, only secondments from associated partners located in low to middle-income third countries included in the <a href="#">List of Participating Countries in Horizon Europe</a> are eligible for funding.</p>
<b>Associated Partners linked to a beneficiary</b>	<p>Associated Partners linked to a beneficiary are organisations with an established capital or legal link with the beneficiary, which is not limited to the action nor specifically created for its implementation.</p> <p>The Associated Partners linked to a beneficiary do not have the right to claim unit contributions. They can host and second staff in Staff Exchanges.</p> <p>For secondments from associated partners linked to a beneficiary, only the sector (academic or non-academic) of the beneficiary counts; the linked associated partners will be considered to belong to the same sector as their beneficiary.</p> <p>In addition, they must fulfil the eligibility conditions for participation and funding applicable to the beneficiary to which they are linked.</p> <p>The type of link and involvement of such entities must be clearly described in the proposal and will be assessed as part of the evaluation.</p>
<b>Interdisciplinarity</b>	<p>It means the integration of information, data, techniques, tools, perspectives, concepts or theories from two or more scientific disciplines. The term discipline refers to the first level of <a href="#">MSCA keywords</a>.</p>
<b>Critical risk</b>	<p>A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.</p> <p>Level of likelihood to occur (low/medium/high): The likelihood is the estimated probability that the risk will materialize even after taking account of the mitigating measures put in place.</p> <p>Level of severity (low/medium/high): the relative seriousness of the risk and the significance of its effect.</p>

<b>CA - Consortium Agreement</b>	<p>The Consortium Agreement (CA) is a private agreement between the beneficiaries, to set out the rights and obligations amongst themselves. It does not involve the European Commission or REA.</p> <p>It sets the framework for successful project implementation and exploitation of results including intellectual property management, and is meant to settle, where possible, all issues that might hamper the smooth and seamless cooperation of the different actors for the different parts of the project.</p> <p>The members of the consortium must sign a CA.</p>
<b>GA – Grant Agreement</b>	<p>The Grant Agreement is the legal instrument that provides for EU funding of a successful proposal. The following link outlines the process: <a href="#">Grant Agreement preparation procedure</a> and takes precedence over any agreement that may be reached among members of the consortium.</p>
<b>MSCA Green Charter</b>	<p>The MSCA Green Charter is a code of good practice for individuals and institutions that receive MSCA funding. It promotes the sustainable implementation of research activities. The goal of the Green Charter is to encourage sustainable thinking in research management. This document can give you some ideas while writing your project proposal:</p> <p><a href="https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-green-charter">https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-green-charter</a>.</p>
<b>PA - Partnership Agreement</b>	<p>Partnership Agreements (PA) are private agreements concluded with the purpose to regulate the relationship between beneficiaries and Associated Partners, including the secondment period framework. Beneficiaries must be careful to conclude these agreements in compliance with their obligations laid down in the Grant Agreement and the Consortium Agreement as well.</p>

**START PAGE COUNT – MAX 30 PAGES**

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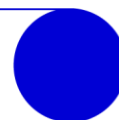
**1. Excellence****1.1. Quality and pertinence of the project's research and innovation objectives (and the extent to which they are ambitious, and go beyond the state of the art)**

- In this opening section, introduce the evaluators to the research problem your project will address and explain why this problem is important and needs to be solved. Consider including your project's overarching goal - keeping in mind the objectives of the SE call.

Required sub-headings:

- Introduction, objectives and overview of the research and innovation programme. Detail the research and innovation objectives. Are the objectives measurable and verifiable? Are they realistically achievable?
- Outline the key specific Research Objectives of the programme (emphasising their novelty and interdisciplinarity). Use a bulleted list, text box or table to make them stand out. Have in mind that research objectives should correspond to the Work Packages under section 3.1.
- Make sure research objectives are SMART (Specific, Measurable, Attainable, Relevant and Time-Bound).
- Why do you need to work together on this research? Explain why a collaborative approach is needed to solve the problem and briefly why your consortium is best placed to do so. Describe the importance of the intersectoral and interdisciplinary approach.
- Refer openly to the innovative elements of this project (topic, consortium, synergies...)
  
- Pertinence and innovative aspects of the research programme (in light of the current state of the art and existing programmes / networks). Describe how your project goes beyond the state-of-the-art, how the overall research programme will deliver scientific breakthroughs, and the extent to which the proposed work is ambitious.
- Expand on the state of the art to explain why the research is original, innovative and timely compared to the state of the art in the research area.
- Describe how the research objectives address the gaps in the state-of-the-art.
- Use footnotes to cite key and relevant sources – make sure to cite consortium members' work and show the high-level of expertise within the consortium.
- Benchmark against other EU funded projects in the same/similar field - but do not limit your benchmarking to EU funded consortia. You can check [http://cordis.europa.eu/projects/home\\_en.html](http://cordis.europa.eu/projects/home_en.html) to see EU funded projects.
- In relation to the scope of the call – address why you need to work together, innovative nature (topics, consortium, synergies...).

The action should be divided in **Work Packages** and described in the table below. The Work Packages should reflect the research objectives. Only brief headings and overviews of the Work Packages should be presented in Table 1. More details in terms of actual implementation should be provided in the tables under section 3.1.

Table 1 – Work Package<sup>1</sup> (WP) List

Work Package No	Work Package Title	Activity Type (e.g., Research, Training, Management, Communication, Dissemination) <sup>2</sup>	Number of person-months involved per secondment <sup>3</sup>	Lead beneficiary	Start month	End month

The title of the scientific Work Packages should give a good idea of the scope of the research & innovation objectives of that Work Package.

- Break down the research programme into (typically) 3-4 discrete research Work Packages (WP) relating to the research objectives.
- Each WP should be understood as a thematic container. Together, all your WPs should address the overarching research goals of your project.

#### STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

1. *The project objectives are clearly formulated and extremely relevant from both theoretical and policy points of view. Concrete indicators for their measurement are properly defined.*
2. *The research and innovation objectives are very well specified and convincing. The specific training, dissemination and collaboration objectives are also carefully prepared and detailed, which is further clarified by providing a comprehensive breakdown of each type of objective with some level of quantification.*
3. *The quality and novelty of the planned research activities are sufficiently demonstrated and they are relevant to the current state-of-the-art.*
4. *The theoretical framework of the project is sound and of high quality. The proposal presents a convincing state-of-the-art analysis, providing a contextual background to the research. Advancements beyond state-of-the-art have also been sufficiently developed.*
5. *The proposed research and innovation objectives are clearly described, easily measurable and verifiable; the innovative aspects are highly relevant.*

#### WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

1. *The research and innovation objectives are defined only in broad terms, without going into detail about possible measurable outcomes for the individual goals.*
2. *The proposed goals and the related work seem overambitious regarding the many different methods and materials.*
3. *The state-of-the-art is not elaborated and referred to the latest literature in sufficient detail. It is not fully clear how the proposed studies will go beyond the state-of-the-art as the specific materials and foreseen applications are not well defined.*
4. *The innovative aspects of the proposal are rather weak since the proposed methods and approaches have already been developed.*

<sup>1</sup> A work package is defined as a major subdivision of the proposed project.

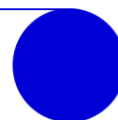
<sup>2</sup> Encode person months for R&I activities only

<sup>3</sup> The same person-month should not be declared in multiple WPs.

## 1.2. Soundness of the proposed methodology (including international, interdisciplinary and inter-sectoral approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality of open science practices)

Required sub-headings:

- Overall methodology: Describe and explain the overall methodology including the concepts, models and assumptions that underpin your work. Explain how this will enable you to deliver your project's objectives. Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them.
- Explain how you will deliver on your project's objectives (equipment, techniques, assays, types of research etc.)
- Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them.
- You need to provide enough information so that the evaluator can understand how you will tackle the problem at hand.
- You need to show what is innovative about your particular approach, and how it can be achieved through secondment of staff (and subsequent reintegration in their own organisation).
- Integration of methods and disciplines to pursue the objectives: Explain how expertise and methods from different disciplines will be brought together and integrated in pursuit of your objectives (fill in Table 2 with the interdisciplinary secondments). If you consider that an interdisciplinary approach is unnecessary in the context of the proposed work, please provide a justification.
- Explain the added value of both the interdisciplinary approach in terms of addressing your research objectives and to the transfer of interdisciplinary knowledge during the reintegration phase of seconded staff.
- Ask yourself why this consortium is the best team to address these research objectives from a cohesive, interdisciplinary, and intersectoral point of view. Highlight the role of each consortium member in the research programme.
  - *Same-sector secondments (that meet the interdisciplinary conditions) in EU Member States and Horizon Europe Associated Countries (MS/AC) are eligible for funding for up to 1/3 of the project total eligible person-months funded by the EU.*
  - *Secondments are considered as Interdisciplinary if the activities performed during the secondment integrate aspects (information, data, techniques, tools, perspectives, concepts or theories) from two or more different scientific disciplines. In assessing the interdisciplinary dimension of proposals, expert evaluators will consider the descriptors (keywords) available in part A of the proposal form making reference, in principle, to the **first level of MSCA keywords**. You may refer to a few examples in our [FAQ](#).*
- A list of MSCA keywords is available on: <https://rea.ec.europa.eu/system/files/2021-10/MSCA%20Keywords.pdf>



**Table 2 – Interdisciplinary secondments between partners within EU MS/AC participants in the same sector (aca-aca / non-aca-non-aca)**

N.	(from) Sending MS/AC partner Organisation short name*	Country	Sector	Keyword/Discipline	(to) Receiving MS/AC partner organisation short name*	Country	Sector	Keyword/Discipline	Total Person months (p/m) for the partner**
1	Organisation 1 short name	IT	Aca	S3-Law	Organisation 2 short name	ES	Aca	L1-Molecular and Structural Biology	26
2	Organisation 1 short name	IT	Aca	S3-Law	Organisation 5 short name	BE	Aca	S7-Education	7
3	Organisation 3 short name	PT	Non-Aca	S6 - Philosophy	Organisation 4 short name	NL	Non-Aca	G1-Computer science and informatics	19

- It is important to make sure secondments keep within the secondment rules:
- Secondments within EU Member States or Horizon Europe Associated Countries must be between different sectors (academic and non-academic), except for interdisciplinary secondments, which must be limited to a maximum of one third of the total months spent under the action.
  - Examples of what constitutes an interdisciplinary secondment are available on **REA FAQ**.
  - Secondments from 'Associated Partners' (no matter from where they come, EU MS, HE AC or Third Countries) are not eligible for funding. An exception is valid for low to middle-income Third Countries listed in the Horizon Europe Programme Guide; these are eligible to receive funding for seconding a staff member to an EU MS and HE AC institution. These secondments don't count as interdisciplinary ones.

*1, 2 and 3 are just examples. Please, remove them from your proposal.*

*\* Please use the same organisation short name as provided in Part A - Section 3 - Budget table*

*\*\* Please, list only the total amount per partner and do not list all individual secondments*

- **Gender dimension and other diversity aspects:** Describe how the gender dimension and other diversity aspects are taken into account in the project's research and innovation content. If you do not consider such a gender dimension to be relevant in your project, please provide a justification.
- Remember that this question relates to the content of the planned research and innovation activities, and not to gender balance in the teams in charge of carrying out the project.
- Where applicable, gender aspects in research activities where human beings are involved as subjects or end-users, gender differences may exist. In these cases, the gender dimension in the research content has to be addressed adequately.
- Sex, gender and diversity analysis refers to biological characteristics and social/cultural factors respectively. For guidance on methods of sex / gender analysis and the issues to be taken into



*account, please refer to [Gender equality in research and innovation | European Commission \(europa.eu\)](#). For further information, you can refer to the [“gendered innovation” project page on Europa website](#), where a report with methodology and tools on integration of gender dimension in research content is available.*

- In other words, ask yourself the following questions:
  - Will the results of the research, now or at any point in the future, be applicable to humans? If so, gender/intersectionality needs to be considered.
  - Will the results of the project affect males and females in the same way?
  - Does the methodology ensure that (possible) gender differences will be investigated: that sex/gender-differentiated data will be collected and analysed throughout the research cycle?
  - Are questionnaires, surveys, focus groups, etc., designed to unravel potentially relevant sex and/or gender, or other diversity differences in your data?
  - Are the groups involved in the project (e.g., samples, testing groups) gender-balanced?
- A gender dimension may apply to research involving the **use of animals too**. If this applies to your research programme, you must briefly explain how you have taken gender into account in the research methodology, e.g., using animal models of genders, and separation of research subjects into male and female groups.
- Apart from gender dimension in research, and if applicable, include **other diversity aspects** to better address the multiple and interacting factors of inequality experienced by R&I actors, such as other social categories and identities: e.g.; ethnicity and race (including migrants and refugees), social class and wealth, human physical parameters (size, weight), gender identity, sexual orientation, LGBTI+ issues, disability and age.
- More questions on the gender aspect in research are available on [https://docs.wixstatic.com/ugd/17c073\\_22d7b327acc8434a91dbceba1898e7d2.pdf](https://docs.wixstatic.com/ugd/17c073_22d7b327acc8434a91dbceba1898e7d2.pdf)
- The European Commission produced a video on Understanding the Gender Dimension for MSCA projects <https://www.youtube.com/watch?v=Hq4eWo30Rfy>
- The European Commission has published a [Toolkit gender in EU-funded research](#)
- The [Horizon Europe programme guide](#) is a good source of information and contains links to further sources, including examples (chapter 9).
- *If you plan to use, develop and/or deploy artificial intelligence (AI) based systems and/or techniques you must demonstrate their technical robustness. AI-based systems or techniques should be, or be developed to become:*
  - *technically robust, accurate and reproducible, and able to deal with and inform about possible failures, inaccuracies and errors, proportionate to the assessed risk they pose*
  - *socially robust, in that they duly consider the context and environment in which they operate*
  - *reliable and function as intended, minimizing unintentional and unexpected harm, preventing unacceptable harm and safeguarding the physical and mental integrity of humans*
  - *able to provide a suitable explanation of their decision-making processes, whenever they can have a significant impact on people's lives.*

- If your project has AI usage, you must address their technical robustness here. You must also mention it in the Part A Ethics Assessment table. More information is available in [Guidelines on ethics by design/operational use for Artificial Intelligence](#).
- **Open science practices:** Describe how appropriate open science practices are implemented as an integral part of the proposed methodology. Show how the choice of practices and their implementation are adapted to the nature of your work, in a way that will increase the chances of the project delivering on its objectives. If you believe that none of these practices is appropriate for your project, please provide a justification here.
 

Open science is an approach based on open cooperative work and systematic sharing of knowledge and tools as early and widely as possible in the process. Open science practices include early and open sharing of research (for example through preregistration, registered reports, pre-prints, or crowd-sourcing); research output management; measures to ensure reproducibility of research outputs; providing open access to research outputs (such as publications, data, software, models, algorithms, and workflows); participation in open peer-review; and involving all relevant knowledge actors including citizens, civil society and end users in the co-creation of R&I agendas and contents (such as citizen science).

  - *Please note that this question does not refer to outreach actions that may be planned as part of communication, dissemination and exploitation activities. These aspects should instead be described below under ‘Impact’*
- You must provide concrete information on how you plan to comply with the mandatory, and when relevant, recommended open science practices – at consortium and beneficiary levels.
- In section 3, while describing the consortium as a whole, you can point out that the involved organisations apply open science strategies, especially if they implement some specific strategies.

Mandatory OS practice
<ul style="list-style-type: none"> <li>✓ open access to scientific publications under the conditions required by the Grant Agreement;</li> <li>✓ responsible management of research data in line with the FAIR principles of ‘findability’, ‘accessibility’, ‘interoperability’ and ‘reusability’;</li> <li>✓ information about the research outputs/tools/instruments needed to validate the conclusions of scientific publications or to validate/re-use research data;</li> <li>✓ digital or physical access to the results needed to validate the conclusions of scientific publications, unless exceptions apply;</li> <li>✓ in cases of public emergency, if requested by the granting authority, immediate open access to all research outputs under open licenses or access under fair and reasonable conditions to legal entities that need the research outputs to address the public emergency.</li> </ul>

Recommended OS practice
<ul style="list-style-type: none"> <li>✓ Open Science practices beyond the mandatory ones, such as involving all relevant knowledge actors, including citizens, early and open sharing of research, output management beyond research data, open peer-review, pre-registration of research, (i.e. specifying your research plan in advance of your research and submitting it to a registry).</li> </ul>

- Describe how the project will ensure that the relevant OS practices will be implemented as an integral part of the proposed methodology, therefore increasing the chances of the project delivering on its objectives.
- In addressing OS practices, take into account:
  - ❖ **Early and open sharing:** specific information on what type of early and open sharing is appropriate (if applicable) for your discipline and project, such as preprints or preregistration/registration reports, and which platforms you plan to use.

- ❖ **Reproducibility of research outputs:** you should outline the measures planned in the project that tend to increase reproducibility. Such measures may already be mentioned in other parts of the methodology of a proposal (such as transparent research design, the robustness of statistical analyses, addressing negative results, etc.) or in mandatory/non-mandatory open science practices (e.g., the Data Management Plan, early sharing through preregistration and preprints, open access to software, workflows, tools, etc.).
- ❖ **Open access (OA):** Provide specific information on how you will meet the OA requirements, that is deposition and immediate open access to publications and OA to data through a trusted repository, and under open licenses. You may elaborate on the publishing locations that you will use and/or trusted repository/repositories through which OA to publication and research data will be provided.

OA should be “**as open as possible and as closed as necessary**”, remaining “open” in order to foster accessibility, reusability, and accelerate research, but at the same time information should be “closed” to safeguard the privacy of the subjects (protection of the private data), protecting results that can reasonably be expected to be commercially or industrially exploited, keeping confidentiality in connection with security issues.

As a general rule, OA to other research outputs such as software, models, algorithms, workflows, protocols, simulations, electronic notebooks, and others is not required but strongly recommended. Access to ‘physical’ results like cell lines, biospecimens, compounds, materials, etc., is also strongly encouraged.

- ❖ **Open peer review:** Whenever is possible, you are invited to prefer open peer review for your publications over traditional (‘blind’ or ‘closed’) peer review. When this is the case, you should provide specific information regarding the publishing locations you envisage using, and highlight those that would qualify as providing open peer review.
  - As a peer-reviewed publishing service, you can also use **Open Research Europe**, the European Commission’s open access publishing platform for scientific articles for Horizon 2020 and Horizon Europe.
- ❖ **Citizen, civil society and end-user engagement:** Provide clear and succinct information on how citizen, civil society and end-user engagement will be implemented in your project, where/if appropriate. The kinds of engagement will depend on the type of research activities envisaged and may include activities such as:
  - Co-design activities (such as workshops, focus groups or other means to develop R&I agendas, roadmaps and policies);
  - Co-creation activities (involving citizens and/or end-users directly in the development of new knowledge or innovation, for instance through citizen science and user-led innovation);
  - Co-assessment activities (such as assisting in the monitoring, evaluation and feedback to the governance of a project, projects, policies or programmes on an iterative or even continual basis).
- It is recommended that you provide OA to research outputs beyond publications and data (software tools, models, apps, etc.) and share them as early and openly as possible – providing guidance for potentially interested users.
- A clear explanation of how the consortium will adopt recommended practices, as appropriate for projects, will result in a higher evaluation score.

- Justification is needed in case you believe that none of these practices are appropriate for your project.
  - Research data management and management of other research outputs: Applicants generating/collecting data and/or other research outputs (except for publications) during the project must provide maximum one page on how the data will be managed in line with the FAIR principles (Findable, Accessible, Interoperable, Reusable), addressing the following (the description should be specific to your project):
    - If you expect to generate or re-use data and/or other research outputs (except for publications), you are required to outline (including OS practices) how these will be managed.
    - Research Data Management (RDM), in line with the FAIR principles, is a requirement that should be carried out regardless of whether the data generated and re-used in the project is intended to be openly accessible, or if access restrictions are foreseen.
      - Types of data/research outputs/research outputs (e.g., experimental, observational, images, text, numerical) and their estimated size; if applicable, combination with, and provenance of, existing data.
      - Findability of data/research outputs: Types of persistent and unique identifiers (e.g., digital object identifiers) and trusted repositories that will be used.
      - Accessibility of data/research outputs: IPR considerations and timeline for open access (if open access not provided, explain why); provisions for access to restricted data for verification purposes.
      - Interoperability of data/research outputs: Standards, formats and vocabularies for data and metadata.
      - Reusability of data/research outputs: Licenses for data sharing and re-use (e.g., Creative Commons, Open Data Commons); availability of tools/software/models for data generation and validation/interpretation /re-use.
      - Curation and storage/preservation costs; person/team responsible for data management and quality assurance.
  - If using the **European Open Science Cloud (EOSC)** federated repositories, you should explicitly discuss their use in the proposal.
  - Show best practice in RDM – including provisions required to be in place to ensure that data is managed responsibly (e.g., the right location is chosen for deposition, legal provisions such as general data protection regulation (GDPR) are respected, etc.).
  - FAIR data is not equivalent to open data (publicly available to everyone to access and reuse). Data can and should be FAIR, even when access is restricted.
  - More details should be provided in a data management plan (DMP), which is not required at submission stage, but it is a mandatory deliverable at month 6. In the text, explain that further details will be provided in the DMP.
  - The **Horizon Europe programme guide** is a good source of information and contains links to further sources, including examples on Open Science practices and research data management (chapter 16).
    - *Proposals selected for funding under Horizon Europe will need to develop a detailed data management plan (DMP) for making their data findable, accessible, interoperable and reusable (FAIR) as a deliverable at mid-term and revised towards the end of a project's lifetime.*
    - *For guidance on open science practices and research data management, please refer to the relevant section of the [Horizon Europe Programme Guide on the Funding & Tenders Portal](#).*

**STRENGTHS FROM THE EVALUATION SUMMARY REPORTS**

1. *The overall methodology is appropriate and very well describes the challenges to be faced. Integration of methods and disciplines to pursue the objectives is well above average.*
2. *The project benefits from a very good methodology. It emphasizes the challenges which could be met during the realization of the foreseen tasks.*
3. *The interdisciplinary and intersectoral nature of planned activities is well demonstrated: the proposed activities will bring together a comprehensive international multidisciplinary network of experts, and will be supported by a well-structured secondment programme.*
4. *The gender dimension is well addressed in terms of the research with consideration of female preferences and requirements being considered, and also in terms of project implementation through a gender equality plan.*
5. *Open data sharing between partners has been adequately described based on previous experiences and development of tools for data sharing. An extensive data management plan according to the FAIR principles is provided.*

**WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS**

1. *The different methodologies to be used have not been sufficiently illustrated and, it is not sufficiently clear and specific how they can be linked to the identified scientific objectives to guarantee their achievement. The provided description does not offer sufficiently convincing evidence that all the defined objectives can be realistically achievable.*
2. *The proposal does not sufficiently demonstrate the interactions that could lead to interdisciplinarity. The potential interactions are listed generically; these do not convincingly demonstrate the integration of the current expertise and methods with the disciplines mentioned.*
3. *The intersectoral, international and interdisciplinary aspects of the proposed secondments between participants are not sufficiently demonstrated.*
4. *The gender dimension of the research topic is not taken into account and a justification for this is missing from the proposal.*
5. *Open science is discussed in a short and not very detailed format. A data management plan is only superficially addressed and no data handling according to the FAIR principles is mentioned.*

**1.3. Quality of the proposed interaction between the participating organisations in light of the research and innovation objectives**

Required sub-headings:

- Contribution of each participating organisation in the activities planned, with particular emphasis on the scientific objectives described in section 1.1.
- Clearly state what each participating organisation will contribute towards achieving the research and knowledge transfer objectives – you can use a table for brevity and clarity.
- Include their expertise, their contribution to networking events, and their level of participation in the secondments.
- There should be an explicit link between networking activities and specific objectives of the project.
- Include details on how many secondments are planned for the project and how many person months in total.

- Justification of the main networking activities (e.g., workshops/trainings/conferences, etc.).
- Describe the networking activities that will be organised to share knowledge e.g., workshops, meetings, trainings, online networking and knowledge sharing. Highlight interdisciplinary and intersectoral aspects to the networking and training activities.
- Justify how these will contribute to the knowledge-sharing objectives – explain why you have chosen these particular activities and how are they related to the research objectives.
- It could be valuable to open up some events to the wider research community, e.g., a final conference or summer schools open to researchers who are not part of the network/consortium.
- Use a diagram to show the flow of people around the consortium.

#### STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

1. *The proposed secondments between participants in EU/AC in the same sector are considered to be interdisciplinary and are accepted, up to the maximum of 1/3 of the total months funded by EU.*
2. *The proposal demonstrates a broad interdisciplinary and inter-sectoral network for research and knowledge sharing, achieved through well balanced and well-justified secondments in terms of the MSCA - SE scheme.*
3. *Each partner's contribution to the project and their expertise and involvement in the scientific activities are convincingly presented. Particularly the diagrams showing the interactions between work packages and the secondment periods between participants are clear and informative.*
4. *The proposal provides credible details on the expertise of each participant and how they are brought together to achieve the project's objectives.*
5. *The contribution of each participating organization to the planned activities and suitable knowledge sharing is well balanced and of good quality.*
6. *The benefits of the main networking activities via training, courses, and seminars are well justified by the proposal.*

#### WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

1. *The approach ensuring knowledge sharing between participants is not explained with the necessary level of detail and activities devoted to knowledge transfer are not clearly described.*
2. *The proposal does not sufficiently demonstrate the interactions that could lead to interdisciplinarity. The potential interactions are listed generically; these do not convincingly demonstrate the integration of the current expertise and methods with the disciplines mentioned.*
3. *The interactions between participating organisations, particularly between academic and non-academic beneficiaries, and for staff exchanges, are insufficiently elaborated. Specifically, networking activities, including the workshops and thematic schools, are not sufficiently detailed in relation to individual contributions.*
4. *The challenges for each WP and the means to be used by the participants to address and overcome these possible challenges are not credibly identified.*
5. *The proposed contribution of critical resources for industry and evidence-based information for policymakers is somehow overstated.*
6. *The justification of networking activities is offered in general terms, mainly presenting the expected activities rather than their purpose.*

## 2. Impact

### 2.1. Developing new and lasting research collaborations, achieving transfer of knowledge between participating organisations and contribution to improving research and innovation potential at the European and global level

Required sub-headings:

- Describe the development and sustainability of new and lasting research collaborations resulting from international, interdisciplinary and/or inter-sectoral secondments and the networking activities implemented.
- Explain how the secondments and networking activities and the knowledge-transfer achieved via those mechanisms will help to develop a lasting collaboration between the participants.
- Outline your plans for building the collaboration and continuing it after the project has ended (e.g., potential new collaborative projects under MSCA, COST, Erasmus+, the European Institute of Innovation and Technology (EIT) ...)
- Describe how the project will generate knowledge transfer that will benefit the participating organisations.
- Describe the overall strategy for knowledge-sharing and provide an explanation about the secondment programme and networking events.
- Description of secondments should include:
  - how the secondments will contribute to the knowledge sharing objectives,
  - what knowledge will be gained,
  - who is the knowledge provider and recipient,
  - how will transfer of knowledge be achieved (also to home organisation during the reintegration phase).
- Make sure that both doctoral students and postdocs are doing secondments (longer visits >4 months for young researchers have bigger impact).
- Remember that this is the impact section so focus on the impact of the knowledge transfer and how the participating organisations will benefit from it.
- Describe the contribution of the action to the improvement of the research and innovation potential within Europe and/or worldwide.
- Explain how the research programme and the staff's activities will contribute to strengthening Europe's capacity for research and innovation from a human capital perspective (in section 2.4 you can provide more details on economic and social impact). Make a link to relevant EU research / policy goals.
- Show the importance of the research in addressing a challenge/priority at a European/Global level:
  - European Green Deal
  - EU missions under Horizon Europe
  - UN Sustainable Development Goals
- Describe the impact of the *triple-I* dimension (international, interdisciplinary and intersectoral collaboration) on strengthening the research and innovation potential within Europe.

**STRENGTHS FROM THE EVALUATION SUMMARY REPORTS**

1. *The proposal credibly addresses a strategy that will support lasting research collaborations. Existing collaborations and new opportunities for partnerships among the partners are well explained. The interaction with non-EU partners will promote research and innovation worldwide.*
2. *The consortium brings together participants with different profiles, involving experts from different areas, which makes the project interesting for both academia and industry.*
3. *The proposal shows a good plan of action that will result in knowledge transfer between organizations, including event details, scope and delivery plans, locations, and a Work Package shared for all partners. Academic partners will also benefit from new training course development.*
4. *The project will convincingly consolidate established collaborations. The respective contribution to the research enhancement of each partner is well described.*
5. *The impact of project activities on the participants is generally well presented and credible. The knowledge exchanges and the expertise acquired during the secondments are expected to enhance the potential and future career perspectives of the participating staff members (both experienced and early-stage researchers).*
6. *The project clearly contributes to supporting the ERA's R&I performance and enhance EU economic competitiveness in accordance with the Europe 2020 strategy.*

**WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS**

1. *The sustainability of the research collaborations beyond the duration of the proposed activities is not convincingly demonstrated. No future scientific plans are presented, and the proposal does not indicate any concrete strategies and actions expected to secure the sustainability of the newly created collaborations.*
2. *The knowledge sharing during the secondments and the distribution of the knowledge and skills between the partners have not been sufficiently described. It is not clear how the TC partners will benefit from the knowledge transfer, as no secondments are planned to the European partners (except for one TC partner).*
3. *The inter-sectorial and intra-sectorial transfer of knowledge is not well defined and it is unclear as to how the knowledge transfer will directly contribute to achieving the aims of the R&I activities.*
4. *New transfer of knowledge between the partners is insufficiently explained. Many of the proposed network collaborations result from the implementation of a previous RISE network.*
5. *The proposal has only partially demonstrated how the project will improve the research and innovation potential within Europe and/or worldwide. The scientific impact is not entirely demonstrated, and some of the statements are not sufficiently argued.*

**2.2. Credibility of the measures to enhance the career perspectives of staff members and contribution to their skills development**

Required sub-headings:

- Describe how the action contributes to realising the potential of individuals and provides new skills, enhances their knowledge and career perspectives.
- Overall aim is to show an understanding of how participating in the project will help staff to enhance their potential and improve their career prospects.
- Present an analysis of how participating in the programme will affect staff, by describing the positive impact of the various elements, e.g.:
  - New knowledge gained (e.g., research skills, transferable skills);
  - Opportunities for high impact publications and patents;



- Mobility to academic/non-academic sector and/or organisations outside Europe (i.e., experiencing different research environments);
  - Improved understanding of the benefits of international and/or cross-sectoral research;
  - Opening their eyes to new career options, particularly outside academia;
  - Raising their profile through networking, research outputs and communication activities to different target groups (including the media & general public).
- Make the link between your programme's elements/objectives and EU policies about research careers/employability.
- Show that the whole programme (and not only its research components) is in line with EU needs, priorities and long-term goals.

#### STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

1. *The proposal clearly defines how the project will enhance the career perspectives of involved staff, considering the sector, country, and stage of the staff member, and will provide a diverse training program for the staff.*
2. *A very detailed account is provided to show how the career profile of seconded researchers is to be enhanced by their participation. A comprehensive listing of skills in respect of academic and non-academic attributes has been provided, with links to the ways that these might contribute positively to career-progression of the target group.*
3. *The multidisciplinary experience during the secondments will promote the researchers' careers. Especially the experienced researchers will benefit from the secondments, as they will be seconded to very prestigious labs in their fields.*
4. *The measures for the career development of the participating European researchers are very well planned. The technical staff's involvement and specific learning aspects are an excellent addition to this plan.*
5. *The workshops and events arranged during the project will enable the researchers to widen their network and improve communication skills, which will have a positive impact on their careers.*
6. *The potential impact of the project on the researchers' career perspective is well described. The early-stage researchers will have access to very good scientific and soft skills training. The project will enhance their employability both in the public and private sectors.*

#### WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

1. *The proposal does not clearly describe how the collaboration and training during the project will enhance the knowledge and the career perspectives of the staff members.*
2. *Limited details are given regarding the actual implementation of soft skills training (responsible research, entrepreneurship, etc.).*
3. *1 month long ESR secondments are deemed too short to create an impact in terms of providing new skills and career perspectives.*
4. *It has not been convincingly described how the project will contribute to realising the potential of practitioners with new skills and career perspectives.*
5. *The new career perspectives are not appropriately addressed, without a clear indication of what new opportunities in the job market will be result from this work.*
6. *The proposal does not include adequate training for seconded early-stage researchers to help them develop soft skills.*

### 2.3. Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities

Required sub-headings:

- Plan for the dissemination and exploitation activities, including communication activities:

Describe the planned measures to maximise the impact of your project by providing a first version of your '*plan for the dissemination and exploitation including communication activities*'. Regarding communication measures and public engagement strategy, the aim is to inform and reach out to society and show the activities performed, and the use and the benefits the project will have for citizens. Activities must be strategically planned, with clear objectives, start at the outset and continue through the lifetime of the project. The description of the communication activities needs to state the main messages as well as the tools and channels that will be used to reach out to each of the chosen target groups.

- **Dissemination** is sharing research results with potential users - peers in the research field, industry, other commercial players and policy makers.
- Before writing, discuss with all beneficiaries about their own dissemination and exploitation channels/mechanisms.
- Describe in detail the activities you will organise and participate in at a consortium level to disseminate the research results to the relevant audience (e.g., conferences).
- State which specialist journals will be targeted for the publication of the consortium's results and how many articles the consortium aims to produce. Be realistic.
- Describe activities targeted to other potential users, e.g., attending trade shows to engage with industry, organising workshops for clinicians in healthcare-related projects, workshops for NGOs, etc.
- **Exploitation** is using results for commercial/ research/ education/ standardisation purposes or in public policy making. There is a close link between dissemination and exploitation. Dissemination feeds into exploitation, and exploitation is connected with the management of intellectual property.
- Depending on the type and field of research, some exploitation methods are:

<b>Further internal research</b>	The results coming out of the project can be applied to further research in the field and beyond.
<b>Collaborative research</b>	The results can be used for building/contributing to collaborative research projects.
<b>Product development</b>	Results can be used for developing or contributing to a product, process, technique, design, etc.
<b>Standardisation activities</b>	Results could be used to develop new standardization activities or contribute to ongoing work.
<b>Spin-offs</b>	A separate company will or could be established as a result of the research results.
<b>Engagement with communities/end users/policy makers</b>	Describe the activities engaged in to ensure that relevant societal actors will benefit from your project. For example, results will be used in policy briefings to impact on policy.

- Where relevant, remember that the results can and should be widely disseminated AFTER intellectual property protection has taken place (for the open science requirements you can refer back to 1.2. section).
- Mention applicability and commercialisation of the research results (e.g., new product/service, new techniques/methods), possible patents.
- If not applicable directly, indicate the likelihood of how applicable your results may be in the long-term (basic or fundamental research is seldom applicable immediately).
- Show that you understand the potential barriers to exploitation of your results. Just briefly describe the main ones and how will you tackle them. You can provide a more detailed

description within the plan for the dissemination, exploitation and communication (which is a mandatory deliverable).

- Possible obstacles may include: inadequate financing, skills shortages, IPR issues, regulation that hinders innovation, mismatch between market needs and the solution, etc.
- If the results are useful to policymakers/the wider society:
  - Outline what activities you will engage in to ensure that relevant policymakers/societal actors (community or voluntary sector) etc. will be informed about the research results. For example, could you organise a special workshop or information event? For health-related projects, it is advisable to include patient groups in your plans.
  - Some examples are provided in the JRC document [10 Tips for Researchers: How to achieve impact on policy](#)

For additional support in dissemination and communication activities, use services by the EC:

- [Open Research Europe](#) for rapid and transparent publishing.
- [Horizon Results Platform](#) a repository results of EU-funded research and innovation projects.
- [Horizon Results Booster](#) support services to boost the exploitation potential of your research results.
- [Innovation Radar](#) to identify high potential innovations.
- Communication and public engagement activities aim to raise citizens' awareness of the challenges addressed by the project, and to show the impact of the research on citizens' daily lives.
- **Communication** is one-way from sender to receiver, e.g., an article in a newspaper or on TV or radio or via social media, project website etc.
- Describe the activities which the consortium will perform to ensure media coverage about the programme and its results, e.g., press releases to newspapers, feature articles in magazines, articles on social media.
- If applicable, explain who will help you with maximising media coverage, e.g., Communications or Marketing Office/Officer or Impact Officer.
- **Public engagement** aims to engage a broad audience and/or is two-way from sender to receiver, and aims to bring knowledge and expertise on a particular topic to the general public.
- Describe what activities the consortium will perform to engage the general public. If you will second young researchers, have in mind that they should be actively involved in public engagement and communication activities, as a part of communication training/development.
- Plan a range of face-to-face activities (e.g., school visits, lab open days, public talks, science festivals, European Researchers' Night, Researchers at Schools) targeted at multiple audiences.
- Talk to experts at your institution. See what local/national activities you can join. Activities need to take place across the whole consortium, so ask your consortium participants for information on what activities they have in their organisation/region/country.
- If applicable, explain who will help you with public engagement activities e.g., Education/Outreach/Impact Officer.
- Communication and public engagement activities concern not only the project results, but your project as a whole and your research area. These activities can take place throughout the project duration.

- **Include quantifiable targets for measuring the effectiveness of dissemination, exploitation, communication and public engagement activities.** For this you could use a table as shown below.

Activity	Target audience	When	Where	Key indicators (KPI)
Conference (provide the full name)	List the target audience that will participate at the conference	Estimated month of project when it will take place (M12, M14)	If known at the time of the project proposal application	Number of attendees, etc.

- Don't forget to indicate these activities in the related work packages in the Implementation section.
  - *In case your proposal is selected for funding, a more detailed plan will need to be provided as a mandatory project deliverable submitted at mid-term stage with an update towards the end of the project.*
  - *All measures should be proportionate to the scale of the project, and should contain concrete actions to be implemented both during and after the end of the project, e.g., standardisation activities. Your plan should give due consideration to the possible follow-up of your project, once it is finished. In the justification, explain why each measure chosen is best suited to reach the target group addressed. Where relevant, describe the measures for a plausible path to commercialise the innovations.*
  - Strategy for the management of intellectual property, foreseen protection measures, such as patents, design rights, copyright, trade secrets, etc., and how these would be used to support exploitation.
- Have in mind the specifics of the MSCA Staff Exchanges and relevant characteristics that may have an effect on IPR:
  - **Intersectoral exchange** (academic to non-academic sector and industry) requires different IP policies/interest, difference in publication and exploitation;
  - **International dimension** EU-MS/AC vs. third countries – different IP laws and regulations;
  - **Secondments** focusing on the explanation of complementary competences of the participants (host organisation and secondment host organisation) – granting access to background/results for/by secondees (“visitors”).
- Before submitting your proposal and while forming a consortium you should already pay attention to potential and expected results (Intellectual Property), ownership issues and the associated intellectual property rights (IPR) with a view to disseminating and exploiting the results efficiently.
- If you need to protect your background, and/or project idea one measure could be to have a non-disclosure agreement with potential consortium partners.
- Contact your legal/ technology transfer / EU project department as soon as possible for assistance to define rules that fit your organisational and national policies.
- Having a **Consortium Agreement** with a clear set of procedures, IPR management and ownership rights between the consortium members will maximise the exploitation potential of the project's results.
- Good practice is to have an Intellectual Property Committee (beneficiaries and associated partner representatives – especially if the non-academic sector is included) or IP manager

whose role can be to provide internal approval of planned dissemination/exploitation activities, licensing agreements and deciding on IP protection activities.

- Outline plans to exploit any IP/commercial potential arising from the programme. Briefly describe the role of any Technology Transfer Office or similar in helping you to commercialise the results.

- *If your project is selected, you will need an appropriate consortium agreement to manage (amongst other things) the ownership and access to key knowledge (IPR, research data etc.). Where relevant, these will allow you, collectively and individually, to pursue market opportunities arising from the project.*
- *All measures should be proportionate to the scale of the project, and should contain concrete actions to be implemented both during and after the end of the project, e.g. standardisation activities. Your plan should give due consideration to the possible follow-up of your project, once it is finished. In the justification, explain why each measure chosen is best suited to reach the target group addressed. Where relevant, describe the measures for a plausible path to commercialise the innovations.*

*Concrete plans for sections 2.3 must be included in the corresponding implementation tables.*

- *Note that the following sections of the European Charter for Researchers refer specifically to public engagement and dissemination:*

### **Dissemination, Exploitation of Results**

All researchers should ensure, in compliance with their contractual arrangements, that the results of their research are disseminated and exploited, e.g., communicated, transferred into other research settings or, if appropriate, commercialised. It should be targeted at peers (scientific or the action's own community, industry and other commercial actors, professional organisations, policymakers) and to the wider research and innovation community - to achieve the potential impact of the action. Please provide adequate details and sufficient arguments for the choices of your planned activities. Ensure that research is fruitful and that results are either exploited commercially or made accessible to the public (or both) whenever the opportunity arises.

### **Public engagement**

Researchers should ensure that their research activities are made known to society at large in such a way that they can be understood by non-specialists, thereby improving the public's understanding of science. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns.

- *You can also refer to the [Communicating EU research and innovation guidance for project participants](#) as well as to the [“communication” section of the Online Manual](#).*

### **STRENGTHS FROM THE EVALUATION SUMMARY REPORTS**

1. *The proposal considers a wide range of mechanisms to generate the maximum possible benefits not only for all the participating organizations, academic and industrial but worldwide.*
2. *The proposal has a detailed plan for dissemination and exploitation, which includes a wide variety of appropriate actions and communication channels. This will be used to improve the visibility of the results and maximize the impact of the project.*
3. *The dissemination of the scientific results through articles, conferences, workshops, and public discussions have been presented in detail, and the main events have been listed.*
4. *The plan to exploit results is sufficiently described and relevant.*

5. *The communication strategy is sufficiently detailed, and the communication channels used during the project lifetime to communicate results are sufficiently explained.*
6. *The IP management plan is relevant to the objectives of the proposal and adequately considered.*

**WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS**

1. *It is described only in generic terms how the scientific results will generate an impact beyond the goals and duration of the project.*
2. *The different stakeholder groups and specific outreach activities to them have not been adequately discussed. It is not clear how the stakeholders will find these outreach activities and how the success of these outreach activities will be monitored.*
3. *The number of planned scientific publications is unrealistically large. Each seconded researcher would be required to publish at least one paper after a short stay. Joint publications are not adequately considered and thus the affiliation of all publications to the project is not sufficiently justified.*
4. *The result exploitation plans lack a description of how the potential beneficiaries, such as SMEs and other industry sectors, will be involved in realizing the potential applications. This aspect is especially important as no intersectoral mobility is planned.*
5. *The communication strategy is not fully convincing: the target audiences are insufficiently identified, and a structured approach, with tailored measures, to address various audiences or the timeline to reach each different audience are insufficiently developed.*
6. *Intellectual property (IP) aspects lack convincing details. A concrete plan for managing potential IP issues within a large network, including also third countries is missing in the proposal.*

**2.4. The magnitude and importance of the project’s contribution to the expected scientific, societal and economic impacts.**

- Have in mind that during the Horizon Europe implementation, the European Commission aims to achieve an impact-driven programme by maximising the effect of research and innovation. To achieve this aim, the EC identified key impact pathways as follows:

<b>Key impact pathways</b>	
<b>Scientific impact</b>	<ol style="list-style-type: none"> <li>1. Creating high-quality new knowledge</li> <li>2. Strengthening human capital in research and innovation</li> <li>3. Fostering diffusion of knowledge and open source</li> </ol>
<b>Societal impact</b>	<ol style="list-style-type: none"> <li>4. Addressing EU policy priorities and global challenges through research and innovation</li> <li>5. Delivering benefits and impact through research and innovation missions</li> <li>6. Strengthening the uptake of research and innovation in society</li> </ol>
<b>Towards technological/ economic impact</b>	<ol style="list-style-type: none"> <li>7. Generating innovation-based growth</li> <li>8. Creating more and better jobs</li> <li>9. Leveraging investment in research and innovation</li> </ol>

- Try to address all aspects of the key pathways. The concept of key pathways to impact should be discussed in relation to the project.

Required sub-headings:

- *Provide a narrative explaining how the project’s results are expected to make a difference in terms of impact, beyond the immediate scope and duration of the project. The narrative should include the components below, tailored to your project.*

- *Be specific, referring to the effects of your project, and not R&I in general in this field. State the target groups that would benefit.*
  - Expected scientific impact(s): e.g., contributing to specific scientific advances, across and within disciplines, creating new knowledge, reinforcing scientific equipment and instruments, computing systems (i.e., research infrastructures);
  - Expected economic/technological impact: (s e.g., bringing new products, services, business processes to the market, increasing efficiency, decreasing costs, increasing profits, contributing to standards' setting, etc.
  - Expected societal impact(s): e.g., decreasing CO2 emissions, decreasing avoidable mortality, improving policies and decision-making, raising consumer awareness.
- Address the three areas of impact. In terms of scientific impact, describe the impact that your project will have on the scientific community – it can be helpful when writing this section to reflect on what you said in 1.1 regarding how the project is going beyond the state of the art. For economic impact, outline any foreseen economic/technological impacts from your project. Regarding societal impact, describe the effect your project will have on the non-scientific community. Think about who will benefit from your research and what changes will occur as a result of your project.
- Explain how the research project (including dissemination/exploitation/communication/outreach activities) will contribute to Europe's economy and/or society – not just in terms of the research impact but also in terms of the results of the programme (e.g., a new concept of training, new approach, staff career development, etc.).
- If your programme builds on an existing or a previous MSCA consortium project (ITN, RISE), COST Action or other funded project, explain how it does so. Could your research contribute to the development of a new European Standard?
- Explain how the research and training programme will help in bringing ideas to market. The role of the participants from the non-academic sector in this respect should be described, in terms of research commercialisation or training in entrepreneurship/tech transfer to the fellows, etc.
- Expand on a link to EU research/policy goals: [European Green Deal](#), [EU Missions in Horizon Europe](#), [MSCA Green Charter](#), [UN Sustainable Development Goals](#)
- Embed your project into those overarching goals – how do they contribute? On a very small scale is perfectly fine. For the SDGs, when you find the applicable SDG(s), you can indicate a specific target inside the mentioned goal. For defining SDGs, feel free to use [JRC KnowSDGs Platform](#) which can help you to integrate the SDGs into the Impact section of your proposal. For the MSCA Green Charter, make sure to read the accompanying [guidance material](#) for inspiration.
- *Only include such outcomes and impacts where your project would make a significant and direct contribution. Avoid describing very tenuous links to wider impacts.*
  - *Give an indication of the magnitude and importance of the project's contribution to the expected outcomes and impacts, should the project be successful. Provide quantified estimates where possible and meaningful. 'Magnitude' refers to how widespread the outcomes and impacts are likely to be. For example, in terms of the size of the target group, or the proportion of that group, that should benefit over time; 'Importance' refers to the value of those benefits. For example, number of additional healthy life years; efficiency savings in energy supply, etc.*
- To illustrate the magnitude/benchmark and importance of the project contribution to outcomes and impacts, you can use a table. For example:

Expected outcome	Description	Magnitude	Importance	Expected impact

- For each expected outcome, provide quantified indicators. For example, expected revenues from new technologies, size of patient groups that will be affected by a new treatment, number of new jobs/potential projects/ career opportunities for the staff that will be created after a successful project, growth in the number of users of emerging technology, etc.
- Remember that in the [MSCA Work programme](#) (page 37) you already have identified expected outcomes for the staff members and participating organisations that are related to the Staff Exchanges projects.
- More examples of expected outcomes and impact is provided in the [HE Programme Guide](#) (pg. 30 – 32)

#### STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

1. *The overall added value of the proposal and impact are sufficiently described. Concrete expected scientific, economic/technological and societal impact(s) are convincingly presented and they are all relevant.*
2. *The potential scientific impact of the proposed activities beyond the scope and duration of the project is correctly identified and generally realistic.*
3. *The planned activities have a good potential to make a difference in terms of scientific impact, beyond the scope and the duration of the project.*
4. *The description of the project's impact in scientific, societal, and economical terms is clearly presented with appropriate performance indicators.*
5. *Economic long-term impact is explained in a comprehensive manner and is expected to have a measurable impact on agricultural industries.*

#### WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

1. *Despite the important scientific topic, the proposal does not give sufficient attention to which aspects of the project or the final products will have a definitive impact on the science of the field.*
2. *The project will not make a significant scientific impact during and after the project or beyond the scope of the proposal. The effect on promoting further studies is not discussed in sufficient detail and the project will not improve the research potential.*
3. *The scientific impacts of the action are not clearly identified by the proposal, and it is unclear how the findings/results of the R&I actions from the project will affect the development of relevant scientific fields.*
4. *The concrete economic and technical impact at the European or global level and the market potential have not been considered in sufficient detail.*
5. *The description of the project's impact in societal and economical terms is not sufficient because no indicators are presented.*



### 3. 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

Required sub-headings:

- Work Packages description (please include table 3);
- List of major deliverables (please include table 4);
- List of risks (please include table 5).

**Note - Due date:** The schedule should indicate the **number of months** elapsed from the start of the action (Month 1).

You should describe:

- *Consistency and adequacy of the work plan and the activities proposed to reach the action objectives (research/innovation activities, training, transfer of knowledge, etc.). Describe how the proposed secondments are necessary to implement the activities described and their duration is appropriate to achieve the objectives.*
  - Show that the level of effort for each WP is in line with the amount of work involved and the overall needs of the project.
  - For each WP, make sure objectives are clearly presented.
  - Have adequate number of significant deliverables and milestones not only for the scientific aspects but also for the management, training and dissemination activities.
  - Make sure that the distribution of the secondments is balanced throughout the years of project implementation and justified and linked to the scientific activities. If you have any partner just receiving or just sending staff, make sure it is explained clearly and justified. Each partner needs to have a specific role and they need to complement each other. Partners only receiving secondments will be Associated Partners in the project.
  - Secondments needs to be aligned with participants' capacity e.g., partners with small capacity should not have a high proportion of the total secondments.
- *Credibility and feasibility of the action through the activities proposed.*
  - The feasibility of the project can be demonstrated by providing a detailed description of the work plan, tasks, participating organisations and resource allocations.
  - For the allocation of task and resources make sure it is adequate to the capacities of participating institutions (including relevant knowledge and expertise). Have in mind the rational distribution of responsibilities and tasks amongst the partners, with work package leaders' roles being equally distributed among consortium.
  - Pre-visit preparations are valuable, for the smooth integration into the host organisation, especially for early career researchers. Make sure you provide sufficient information regarding the preparations (who will do what, when).
- *Credibility and feasibility of the allocation of secondments proposed to reach the action objectives (research/innovation activities, training, transfer of knowledge, etc.). Describe how the number of staff available and the staff member profiles are appropriate to implement the activities linked to the different secondments.*
  - The duration of secondments, the link between them, how they support tasks and deliverables, and the availability of staff for secondments must be clear.
  - Make sure your project is clearly structured, secondments are feasible and the link between work packages (and the associated research objectives) is well addressed.

- Beside the secondments, describe network activities that will be organized with the aim to share knowledge (e.g., workshops, meetings, trainings, online networking, etc.).
  - *Important! Please read this section carefully as there is information on what are Work Packages, tasks, deliverables. The tables provided (Table 3 and Table 4) must be included as part of your description*
  - *In all cases, the beneficiaries must take all specific steps and measures to implement the principles set out in the European Charter for Researchers and the Code of Conduct for their Recruitment<sup>4</sup>.*
  - *Please consider the environmental aspects in light of the MSCA Green Charter<sup>5</sup>*
- The goal of the MSCA Green Charter is to encourage sustainable thinking in research management and to reduce the environmental impact of research activities. All MSCA projects are encouraged to adhere to as many provisions of the Green Charter as possible, on a best effort basis.
- You can describe sustainable measures of secondment implementation (especially regarding travel arrangements) and sustainable project management.
- Some measures individuals and institutions are invited to consider are to:
  - reduce, reuse and recycle, promote green purchasing for project-related materials,
  - ensure the sustainability of project events,
  - use low-emission forms of transport,
  - promote teleconferencing whenever possible,
  - use sustainable and renewable forms of energy,
  - develop awareness on environmental sustainability, etc.
- The European Commission has published a set of **guidance material** together with the MSCA Green Charter, which can serve as inspiration.

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<sup>4</sup> Both available at <https://euraxess.ec.europa.eu/jobs/charter/european-charter>

<sup>5</sup> Available at <https://ec.europa.eu/research/mariecurieactions/green-charter>. The MSCA Green Charter constitutes a code of good practice for all recipients of MSCA funding – both individuals and institutions – and promotes the mainstreaming of environmental considerations in all aspects of project implementation. In so doing, the Charter seeks to reduce the environmental footprint of MSCA-funded projects, to raise awareness of environmental sustainability, and to serve as a catalyst in promoting best practice in sustainable research management.

**Table 3: Work Package description**

➤ Table to be included in above sub-heading “Work Packages description”

<b>Work Package no.</b>	<b>"X*"</b>	<b>Start/end month<sup>6</sup></b>	<b>__/__/__</b>
<b>Work Package title</b>	(e.g., relevant title reflecting the R&I goals, Training, Transfer of knowledge activities, Management, Communication, Dissemination, etc.)		
<b>Lead beneficiary</b>			
<b>Participating organisation short name**</b>			
<b>Total person months per Participating organisation:</b>			
<b>Objectives:</b> <i>Explain the main objectives of the Work Package (e.g., R&amp;I, Training, Transfer of Knowledge (Through secondments, After secondments /Through reintegration)</i>			
<b>Description of Work and role of specific beneficiaries/associated partners broken down and listed into numbered tasks including the following details:</b>  <b>Task "X.1"</b> <ul style="list-style-type: none"> <li>• <i>Total number of person months allocated to secondments= " _ " :</i></li> <li>• <i>Brief description of the task in terms of relevant information concerning the specific activity/goal, the leading organisation of the task, the role(s) of the participating organisation(s), the profiles of the involved staff members, etc.</i></li> </ul> <b>Task "X.X"</b> ...			
➤ You can provide details on the methodology (specific tasks) that are not described in section 1.			
<b>Description of deliverables:</b> <i>- provide a brief description of the planned deliverables that is consistent with the deliverables to be listed from all Work Packages in Table 4</i> <i>- i.e., consider consolidating the above listed tasks into a reasonable number of concrete outcomes (scientific and/or management, training and dissemination deliverables)</i>			

\*Add a table for each Work Package with a number

\*\*The participating organisation short name and person-months allocated to each participating organisation should be coherent with the tables in Part A of the proposal.

- A potential Work Package structure could be as follows:
  - 3-4 Research WPs
  - Knowledge transfer /Training WP (for secondments and networking - or integrate these into the Research WPs)
  - Impact WP (to include all dissemination, communication, exploitation activities)
  - Management WP

➤ Note: A WP leader can be a Beneficiary or an Associated Partner (except for Management WP).

<sup>6</sup> Start/End Month refers to months of the project not calendar months

- Important! You can only allocate person months (PM)s to WPs based on secondments!
- Research WPs: PMs are based on research and innovation activities carried out only for the secondments.
- Management or Communication/Dissemination WPs: there are no PMs allocated to these WPs.  
Have in mind that the maximum for a Staff Exchanges project is 360 person-months of secondment.
- Each Work Package must be described in detail: title, objectives, tasks, calendar, contributors.
- The work plan must be coherent and efficient regarding the research programme and training objectives. It must convince the evaluators that you are able to achieve the objectives set.

**Deliverables list**

A **deliverable** is a distinct output of the action, meaningful in terms of the action’s overall objectives and constituted by a report, a document, a technical diagram, a software, training, conference, etc. The number of deliverables in a given Work Package must be reasonable and commensurate with the Work Package content and the associated secondments. Deliverables shall be encoded in Table 4.

Table 4 requires that deliverables should be divided into (a) scientific deliverables (i.e., scientific and technical content specific to the action) and (b) management, training exploitation, dissemination and communication deliverables.

- **Important!** *The secondments encoded in Part A should NOT be entered in this deliverable Table 4. Moreover, note that the Grant Agreement requires yearly reporting by the consortium to follow-up implementation and to process requests for payments. Please include these reports (e.g., for a 48 month-project, year 1 and 3 progress reports) as managerial deliverables.*
- **Important!** *Any secondments planned to do "purely management activities" (e.g., project coordination meetings, report drafting, etc.) will not be supported. Encode person months for R&I activities only.*

**Table 4 – Deliverables list**

- Table to be included in above sub-heading “Deliverables List”

<i>Scientific deliverables</i>						
<b>Deliverable no<sup>7</sup></b>	<b>Deliverable title</b>	<b>WP no.</b>	<b>Lead beneficiary short name</b>	<b>Type<sup>8</sup></b>	<b>Dissemination level<sup>9</sup></b>	<b>Due date<sup>10</sup></b>

<sup>7</sup> Deliverable numbers in order of delivery dates. Please use the numbering convention <WP number>.<number of deliverable within that WP>. For example, deliverable 4.2 would be the second deliverable from Work Package 4.

<sup>8</sup> Please indicate the nature of the deliverable using one of the following codes:  
**R** = Document, report (excluding periodic and final reports); **ADM** = Administrative (ethics/legal/administrative related outputs); **PDE** = dissemination and/or exploitation of project results (website completion, patents filing, conference, etc.); **OTHER** = Other including coordination

<sup>9</sup> Please indicate the dissemination level using one of the following codes:  
**PU = Public:** fully open, e.g. web; **CO = Confidential:** restricted to consortium, other designated entities (as appropriate) and Commission services; Important: please note that upon approval by the REA Project Officer, the deliverables with Public dissemination level (PU) will be automatically published on [CORDIS](#), the European Commission’s primary portal for results of EU-funded research projects. Therefore, make sure the content is appropriate in terms of both quality and confidentiality.

**CI = Classified:** classified information as intended in [Commission Decision 2001/844/EC](#).

<sup>10</sup> Measured in months from the project start date (month 1).

D1.1 (<WP number>.<number of deliverable within that WP>)	Keep it short		Use organisation short names from Participants Table	R, ADM, PDE or OTHER (see note)	PU, CO, CI (see note). Note that PU means that once validated by the EC, the deliverable can be published on a freely accessible website	(In months elapsed from the start of the project) e.g., M6, M12
<b>Management, Training, and Dissemination Deliverables</b>						
Deliverable Number	Deliverable title	WP no.	Lead beneficiary short name	Type	Dissemination level	Due date

- The following deliverables will have to be submitted for grants awarded under Staff Exchanges:
  - **mid-term meeting** organised between the participants and the granting authority (typically mid-term meeting is due between M14-M18);
  - **progress report** submitted within 30 days after one year from the starting date of the action - include these reports as managerial deliverables;
  - **mobility declaration** submitted within 20 days of the secondment of each seconded staff member, and updated (if needed) via the Funding & Tenders Portal Continuous Reporting tool;
  - **evaluation questionnaire** completed by the seconded staff members and submitted at the end of their secondment period (only one questionnaire for the staff); a follow-up questionnaire submitted two years later;
  - **data management plan** submitted at month 6 and an update towards the end of the project if needed;
  - **plan for the dissemination and exploitation of results, including communication activities**, submitted at mid-term and an update towards the end of the project.
  
- Keep the number of Deliverables to a minimum.
- Remember that you must actually deliver each Deliverable at the fixed due date if the project is funded and implemented, and too many deliverables will make your administrative workload very high.
- Deliverable leader can be a Beneficiary or an Associated Partner.
- Deliverables are submitted to the REA Project Officer in PDF format, so ensure that it would be feasible to present your deliverables in this way.
  - Consider the risks that might endanger reaching the action’s objectives and the contingency plans to be put in place should risk occur.
- Include a list incorporating research risks and project management risks. Describe practical mitigation and contingency plans for all risks.

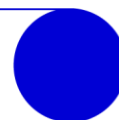


Table 5 – Risks List

➤ Table to be included in above sub-heading “List of risks”

Risk no.	Description of risk	WP no.	Proposed mitigation measures
R1	e.g. delay in planned secondments		

- A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.*

**Level of likelihood to occur:** Low/medium/high  
*The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.*

**Level of severity:** Low/medium/high  
*The relative seriousness of the risk and the significance of its effect.*

#### STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

- The work packages are clearly presented in terms of objectives, tasks and deliverables and the project is credible and feasible through the proposed activities.*
- The various stages in project development are appropriately represented in the proposal. There is satisfactory detail to show how each element connects to others; the sub-tasks are legitimate and connected to the objective of each of the work packages and to relevant outputs. The work plan is consistent and feasible.*
- The project schedule is well detailed and guarantees that interrelationships between the WPs and partners will be carried out effectively. Also, the duration of the proposed secondments is appropriate to achieve the objectives. The work plan in terms of tasks and deliverables is very well detailed and coherent.*
- The person-months allocated to each work package are sufficient and the secondments are directly related to concrete tasks.*
- The project management structure, progress monitoring measures, and practical arrangements in the participating institutions are very well outlined, supporting the action's feasibility.*
- The capacity of the coordinating organisation to manage an international/intersectoral consortium funded by an EU grant is convincingly demonstrated.*
- Both technical and administrative risks are considered in detail, and their mitigation plan is well presented.*

#### WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

- The information flow between the work packages is not adequately presented. The description of the tasks lacks detail. The deliverables in some work packages are not described in sufficient detail, and their timeline is not well balanced.*
- The duration and number of secondments are insufficiently detailed to be convincing with respect to implementation of the project activities.*
- Scientific deliverables are not adequately defined. Most are presented as activities with no quantitative/qualitative indicators or clearly specified means of verification.*
- There is too little consideration of quality assurance measures, both in respect of the research to be undertaken as well as of the overall project delivery.*
- The project management strategy and actions have not been presented in sufficient detail. The supervision, support, and hosting arrangements provided to the seconded researchers have not been adequately discussed.*
- The risks related to the project management or success of the secondments and/or potential delays have not been adequately considered, and the mitigation of these risks has not been explained well.*

### 3.2. Quality, capacity and role of each participant, including hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise

Required sub-headings:

- Appropriateness of the research infrastructure and capacity of each participating organisation, as outlined in Section 4 (Participating Organisations), in light of the tasks allocated to them in the action;
- The aim here is to explain who is doing what and show that they have the necessary infrastructure to do it.
- This section should complement Section 4, not duplicate it (instead, refer to it as appropriate)
- Describe how the consortium has the necessary infrastructure (research and administrative) to implement all aspects of the programme (research, training, admin, communications, exploitation etc.).
- Describe how the participants provide an excellent environment for hosting and supporting the Staff who visit them such as help with finding accommodation, with immigration and other practical matters, including:
  - Have in mind that **EURAXESS Support Centres** will assist with mobility issues. There are >600 support centres all over Europe.
  - Many universities and research centres are EURAXESS Contact Points and have a designated person who can help visiting researchers.
- Note which organisations have endorsed the European Charter & Code and have been awarded the HRS4R 'HR Excellence in Research' award.
- Consortium composition and exploitation of participating organisations' complementarities: explain the compatibility and coherence between the tasks attributed to each beneficiary/associated partner in the action, including in light of their experience; Show how this includes expertise in social sciences and humanities, open science practices, and gender aspects of R&I, as appropriate.
- Explain how the consortium is exceptionally well qualified to implement this programme by referring to:
  - Complementarities/synergies in expertise between all participants and how this complementarity allows them to successfully deliver the programme (if appropriate, use a diagram or table).
  - How their previous experience (and collaboration, if applicable) makes them suitable for their tasks here.
- Outline the commitment of each participant by showing that they are all highly active in the project – refer to earlier sections – use a table.
- For Third Country participants, refer to contents of Letters of Commitment from each TC participant – the proposal text must match the corresponding Letter.
- Particularly important for high-income TC contributing their own budget – they should make a financial commitment in the letter.
- Note any relevant expertise in social sciences and humanities, open science practices, and gender aspects of R&I among the partners.
- Exceptional funding (if applicable)

Only entities from EU Member States, from Horizon Europe Associated Countries or from countries listed in the HE Programme guide are automatically eligible for EU funding. If one or more of the partners requesting EU funding is based in a country that is not automatically eligible

for such funding, the application shall explain in terms of the objectives of the action why such funding would be essential. **Only in exceptional cases** will these organisations receive EU funding. The same applies for international organisations other than IERO (not in EU).

If applicable, explain why participants from **other countries**<sup>11</sup> (i.e. countries that are neither EU Member States nor countries associated to Horizon Europe, nor in the [List of Participating Countries in Horizon Europe](#)) are essential for implementing the project.

- The [HE Programme Guide](#) (page 13) indicates that, exceptional funding is possible if the participant's country is explicitly "*identified in the Horizon Europe work programme and call for proposals as being eligible for funding, and/or the granting authority considers that their participation as a beneficiary is essential for implementing the project, for example in view of their:*"
  - *outstanding competence/expertise*
  - *access to particular research infrastructures*
  - *access to particular geographical environments*
  - *access to particular data."*

Example:

The - *Organisation 6 short name* - requests exceptional funding because ... (Please explain);

**Important!** If the granting authority considers the participation of the above-mentioned organisation/s not essential for implementing the project, the requested secondments/budget cannot be redistributed within the consortium and will be reduced for the total EU funding request.

- Explanation of participation of the associated partners linked to a beneficiary (if applicable)  
Explain the activity performed by the associated partners linked to a beneficiary<sup>12</sup> (see definitions in MSCA Work Programme) and the number of person-months of the beneficiary that will be implemented by the linked associated partner.
- Definition of the associated partners linked to a beneficiary is available at the beginning of the handbook (definition section) and in [MSCA Work programme 2021 - 2022](#) (page 77)
- According to the SE [Guide for Applicants](#) (pg.7, point 3), for secondments from associated partners linked to a beneficiary, only the sector (academic or non-academic) of the beneficiary counts and the linked associated partners will be considered to belong to the same sector as their beneficiary.
- Secondments between associated partners linked to a beneficiary and their linked beneficiary are not possible.
- Associated partners linked to a beneficiary cannot host secondments. Only beneficiaries to which they are linked can host secondments.

<sup>11</sup> As described in the General Annexes, successful applicants established in a country in the process of associating to Horizon Europe, will not be treated as established in an associated country if the association agreement does not apply by the time of the signature of the grant agreement.

<sup>12</sup> Beneficiary means EU MS/AC participant



**STRENGTHS FROM THE EVALUATION SUMMARY REPORTS**

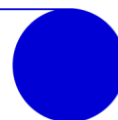
1. *The cutting-edge scientific infrastructure and dedicated staff in the institutions involved in the project will be shared during the project implementation and secondments.*
2. *The number of staff available for the project is justified, and the staff member profiles have been carefully considered to support the project. The tasks assigned to participants are aligned with their relative expertise.*
3. *The participating organisations have high-quality facilities and infrastructure that support the execution of the project and achieving the research objectives and goals. The participating principal investigators have excellent proven expertise, and the partners have multidisciplinary and complementary expertise to execute the work plan.*
4. *Competences and experience of the participating organisations are very good. The participating organisations are complementary and well balanced.*
5. *The researchers' competencies and expertise are very well described, convincingly demonstrating their compatibility and complementarity. The tasks assigned to each partner are coherent with their expertise.*
6. *Consortium participants have extensive experience working on EU funded projects. The expertise of all participants is compatible and very complementary, allowing the effective delivery of the project objectives.*

**WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS**

1. *The capacity of the consortium is not clearly described in the proposal. For example, the proposal insufficiently justifies some of the academic partners' workload balance and the proposed human resources.*
2. *The capacity of the coordinator to manage an EC funded project is not convincingly demonstrated.*
3. *The hosting arrangements, and in particular the measures required to integrate younger researchers into the team, are not described in sufficient detail.*
4. *The number of available staff and the staff member profiles are not sufficiently described.*
5. *The complementarity of the participants is not adequately specified.*
6. *It is not clear which secondments relate to which tasks. The table with the secondments between the partners does not provide background on the work to be fulfilled during the secondments.*

**STOP PAGE COUNT – MAX 30 PAGES (SECTIONS 1-3)****DOCUMENT 2 (no overall page limit applied)****4. Participating Organisations****Note that:**

- *Any relationship between different participating institutions or individuals (e.g. shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, family-ties, etc.) must be declared and justified in this part of the proposal.*
- *All information provided (including table B4) must be based on current data, not on projections; for the annual turnover, approximations are acceptable and any other additional explanations to help assess operational capacity.*
- *The data provided relating to the capacity of the participating institutions will be subject to verification during the grant preparation phase.*
- *The absence of sufficient information in this section may be considered by REA as a ground to disregard the participation of an organisation based on insufficient operational capacity.*



**Table 6– Data for non-academic beneficiaries**

Name	Location of research premises (city/country)	Type of R&I activities	No. of full - time employees involved in the project	No. of employees in R&I	Web site	Annual turnover (approx. in Euro)

- **Important!** This table is mandatory to assess correctly the operational capacity of non-academic beneficiaries.

All organisations (whether beneficiaries or associated partners) must complete the appropriate table below. Complete one table of maximum one page per beneficiary and half a page per associated partners. The experts will be instructed to disregard content above this limit (Min font size: 9).

**Table 7 – Organisations (Beneficiaries and Associated partners) data**

Beneficiary (organisations in EU MS/AC) legal name	
<b>General description</b>	Add a short general description of the beneficiary and a short description of the actual centre/department/laboratory participating in the project.
<b>Role and profile of key people</b>	Include names, qualifications of the person(s) supervising the action.
<b>Key Research Facilities, Infrastructure and Equipment</b>	Demonstrate that the team has sufficient resources to offer a suitable environment to seconded staff and to contribute significantly to the research/innovation activities proposed.
<b>Independent research premises?</b>	Please explain the status of the beneficiary's research facilities – i.e. are they owned by the beneficiary or rented by it? Are its research premises wholly independent from other beneficiaries and/or associated partner organisations in the consortium?
<b>Previous Involvement in Research and innovation actions</b>	Describe relevant research/ innovation actions in which the organisation took part
<b>Current involvement in Research and Innovation actions</b>	Describe relevant research/ innovation actions in which the organisation is currently participating
<b>Publications and/or research/ datasets/ softwares/ innovation products/ other achievements</b>	Max 5 key elements of the achievement, including a short qualitative assessment of its impact and (where available) its digital object identifier (DOI) or other type of persistent identifier (PID). Publications, in particular journal articles, are expected to be open access. Datasets are expected to be FAIR and 'as open as possible, as closed as necessary'.

Associated partner organisations Legal Name	
<b>General description</b>	
<b>Role and Profile of key people</b>	As above
<b>Key research facilities, infrastructure and equipment</b>	As above
<b>Do you have independent research premises?</b>	As above

<b>Previous involvement in research and innovation actions</b>	As above
<b>Current involvement in research and innovation actions</b>	As above
<b>Publications and/or research /datasets/ softwares/ innovation products/ other achievements</b>	Max 3 key elements of the achievement, including a short qualitative assessment of its impact and (where available) its digital object identifier (DOI) or other type of persistent identifier (PID). Publications, in particular journal articles, are expected to be open access. Datasets are expected to be FAIR and ‘as open as possible, as closed as necessary’

<b>Associated partner linked to beneficiary organisations (if applicable) Legal Name</b>	
<b>General description and link to the concerned beneficiary</b>	As above
<b>Key Persons and Expertise</b>	As above
<b>Key research facilities, infrastructure and equipment</b>	As above
<b>Do you have independent research premises?</b>	As above
<b>Previous involvement in research and innovation actions</b>	As above
<b>Current involvement in research and innovation actions</b>	As above
<b>Publications and/or research /datasets/ softwares/ innovation products/ other achievements</b>	Max 3 key elements of the achievement, including a short qualitative assessment of its impact and (where available) its digital object identifier (DOI) or other type of persistent identifier (PID). Publications, in particular journal articles, are expected to be open access. Datasets are expected to be FAIR and ‘as open as possible, as closed as necessary’

**Declarations**

<b>Name (institution / individual)</b>	<b>Nature of relationship</b>

- Applicants **must** use the table above to **declare any inter-relationship between different participating beneficiary institutions or individuals** (e.g., family ties, shared premises or facilities, joint or part ownership, financial interest, overlapping staff or directors, etc.)

## 5. Letters of Commitment

Please use this section to insert scanned copies of the required letters of commitment.

Associated partners must include a letter of commitment in Part B (document 2) of the proposal to ensure their real and active participation in the proposed network. Such letters must follow the template below and should be signed by an authorised person, scanned and included in section B.5. The expert evaluators will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.

In case the letter does not follow the template or fail to give enough information on the associated partner's role and/or enough assurance on their commitment in the project (e.g., no signature, wrong proposal references, outdated letter), the experts may penalise the proposal on these aspects under the implementation evaluation criterion.

- Make sure that the content of the Letters from Associated Partners match their stated tasks in the proposal. Avoid generic/ copy-paste letters.
- Letters needs to refer to the proposal (call, acronym and call identifier) as well as the commitment to implement the secondments indicated in the proposal.

## 5.1 Template of Commitment letter for associated partners

- *On headed paper of the associated partner organisation*
- *Beyond any additional information that the associated partner wishes to indicate in its letter of institutional commitment, the following text should appear in all its parts and with no modifications:*

I undersigned<sup>13</sup> \_\_\_\_\_, in my quality of Legal Authorized Representative of<sup>14</sup> \_\_\_\_\_, commit to set up all necessary provisions to send/host the secondments contributing to the development and implementation of the proposal number \_\_\_\_\_ - acronym \_\_\_\_\_ submitted within the call **HORIZON-MSCA-2022-SE-01** should the proposal be funded.

We will contribute to the [*explanation of the activities performed by the associated partner organisations in order to ensure a successful implementation of the project*].

I am aware of and agree with the principle that the setting up of such provisions is a precondition for the proposal to be funded.

[*Free field for any additional information that the participating organisation wishes to indicate*]

We are pleased to provide any additional information on our commitment towards the project upon your request or the request of the European Commission.

*Name, date, signature*

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<sup>13</sup> First name and surname

<sup>14</sup> Name of the organisation/faculty/department

### Additional ethics information

- If you entered one or more ethical issue/s in the ethical issues table in part A of the proposal, then you must also submit an ethics self-assessment field in part A. More information is available in **How to complete your ethics self-assessment guide**.
- Follow the comprehensive information provided in the Template Part B-1.
- Read research, risk-benefit analyses and ethical issues: **A Guidance Document for Researchers Complying with Requests from the European Commission Ethics Reviews**
- If no ethics issues are associated with your project, then you should still use this heading and state that the proposal does not raise any ethics issues.
- More information on ethics issues in Horizon Europe is available in:
  - **REGULATION (EU) 2021/695** - articles 18. and 19.
  - **Work Programme 2021-2022 – General Annexes** – Ethics part starts on page 11.
- More information on ethics is available in **HE Programme guide** (from page 21.)