

## **NCIP VaVal KnowledgeStor Case Study: Preparing Marie Skłodowska-Curie Actions (MSCA) European Postdoctoral Fellowships**

Using the examples of “M” and “C”

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Date: September 1, 2022, updated Sept. 30, 2022 and April 14, 2023

Content approved in September 2022 by individuals involved in the case study.

**Expected audiences:** Doctoral candidates and early career researchers (ECRs) writing their first MSCA European Postdoctoral Fellowship proposal. Researchers/mentors helping mentees in writing such proposals.

**Keywords:** Doctoral candidates, early career researchers, ECRs, Marie Skłodowska-Curie Actions (MSCA) research funding, postdoctoral fellowships



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## Who and why

### Who's eligible in a glance

- Holders of **PhDs (i.e., postdocs)** at the time of the **deadline** for applications, with a **maximum of eight years** experience in research, from the date of the award of their PhD degree<sup>1</sup>.
- Must **not have resided or carried out their main activity** (work, studies, etc.) in the country of the beneficiary (for European Postdoctoral Fellowships), or the host organisation for the outgoing phase (for Global Postdoctoral Fellowships) for more than 12 months in the 36 months immediately before the call deadline
  - *Option 1: European fellowship:* **Any nationality** doing research in EU Member State or [Horizon Europe Associated Country](#) except in research areas covered by the [Euratom Research and Training Programme](#), where researchers need to be nationals or long-term residents of an EU Member State or a Euratom Associated Country. The beneficiary organisation recruiting the researcher for this kind of research also needs to be established in an EU Member State or Euratom Associated Country.
  - *Option 2: Global fellowship:* **Nationals and long-term residents** of EU Member State or Horizon Europe Associated Countries

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<sup>1</sup> NOTE: Years of experience outside research and career breaks **will not count towards the above maximum, nor will years of experience in research in third countries**, for nationals or long-term residents of EU Member States or Horizon Europe Associated Countries who wish to reintegrate to Europe. A document on guidelines for this is at:

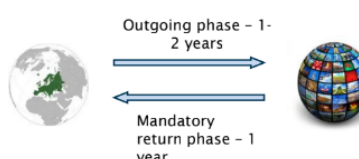
[https://rea.ec.europa.eu/system/files/2022-05/Guidelines\\_8%20year%20rule\\_2022.pdf](https://rea.ec.europa.eu/system/files/2022-05/Guidelines_8%20year%20rule_2022.pdf) and a self-assessment spreadsheet to assist in calculating this is at: [https://rea.ec.europa.eu/document/download/c3487cd3-f595-407c-b87d-a2e2f2b0e2af\\_en](https://rea.ec.europa.eu/document/download/c3487cd3-f595-407c-b87d-a2e2f2b0e2af_en)

## PF Programme Lines – an Overview

### European Fellowships



### Global Fellowships



+ Possibility for additional period of up to six months to support researchers seeking a placement at the end of the project to work on R&I projects in an organisation from the non-academic sector established in an EU Member State or Horizon Europe Associated Country.



Freiburg (online), 2 June 2022

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Screenshot: Representation of programs from a German National Contact Point presentation on MSCA fellowships, June 2022.

Proposals can be on any topic/discipline.

Official information page (source of this info):

<https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships>

### A note on how many people compete for these fellowships

In 2021, more than 11,000 applications were submitted, with only 1,630 project funded.<sup>2</sup> In other words, **fellowships are highly competitive and not all excellent proposals will be funded** (see Seals of Excellence below).

### A note on resubmissions/Seals of Excellence

You can resubmit your application, noting the following restrictions from the MSCA page:

*As from 2022, resubmission restrictions will apply for applications that received a score **below 70%** the previous year.*

<sup>2</sup>

<https://www.chemistryworld.com/news/european-commission-to-reconsider-how-it-announces-winners-of-marie-curie-fellowships/4013269.article>

Seals of Excellence will be awarded to applications with a **total score equal to or higher than 85%**, but which cannot be funded due to lack of budget available under the call.

## Why are there MSCA Fellowships?

According to the official MSCA Fellowship pages,

<https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships>:

“The Postdoctoral Fellowships action targets researchers holding a PhD who wish to **carry out their research activities abroad, acquire new skills and develop their careers**.

Note this refers to:

- An excellent research project idea
- An emphasis on career development and training leading towards a position in academia or in the corporate sector

Both aspects are important in drafting and writing a proposal<sup>3</sup>:

*Expected Outcome:*

*Project results are expected to contribute to the following outcomes:*

*For supported postdoctoral fellows*

- *Increased set of research and transferable skills and competences, leading to improved employability and career prospects of MSCA postdoctoral fellows within academia and beyond;*
- *New mind-sets and approaches to R&I work forged through interdisciplinary, inter-sectoral and international experience;*
- *Enhanced networking and communication capacities with scientific peers, as well as with the general public that will increase and broaden the research and innovation impact.*

*For participating organisations*

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3

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-msca-2022-pf-01-01;callCode=null;freeTextSearchKeyword=;matchWholeText=true;typeCodes=1.0;statusCodes=31094501,31094502,31094503;programmePeriod=2021%20-%202027;programCcm2Id=43108390;programDivisionCode=43108473;focusAreaCode=null;destination=null;mission=null;geographicalZonesCode=null;programmeDivisionProspect=null;startDateLte=null;startDateGte=null;crossCuttingPriorityCode=null;cpvCode=null;performanceOfDelivery=null;sortQuery=sortStatus;orderBy=asc;onlyTenders=false;topicListKey=topicSearchTablePageState>

- *Increased alignment of working conditions for researchers in accordance with the principles set out in the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers;*
- *Enhanced quality and sustainability of research training and supervision;*
- *Increased global attractiveness, visibility and reputation of the participating organisation(s);*
- *Stronger R&I capacity and output among participating organisations; better transfer of knowledge;*
- *Regular feedback of research results into teaching and education at participating organisations.*

It is important to note that **you must be recruited and/or reach out to a researcher/supervisor at a host institution(s)/research group(s)/company(-ies)** where you wish to conduct your fellowship. As the MSCA pages note:

*The beneficiary [SK note: this is the host institution] receiving EU funding needs to recruit the researcher for the total period of the fellowship.*

Further:

*To find a host organisation*

- *your network will be an invaluable source*
- *you can also check the list of hosting offers (expressions of interest) published on Euraxess and other job portals from research institutions interested in supporting your application*

*Offers are often in very concrete fields of research proposed by the host organisation. In many cases, you will be in contact with a supervisor to develop your application.*

Official MSCA Guidelines on Supervision requirements are found at:

<https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-guidelines-on-supervision>

More detailed goals for this funding are included in the EU Funding & tenders portal<sup>4</sup> (SK emphasis in below quote):

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4

<https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-msca-2022-pf-01-01;callCode=null;freeTextSearchKeyword=;matchWholeText=true;typeCodes=1.0;statusCodes=31094501,31094502,31094503;programmePeriod=2021%20-%202027;programCcm2Id=43108390;programDivisionCode=43108473;focusAreaCode=null;destination=null;mission=null;geographicalZonesCode=null;programmeDivisionProspect=null;startDateLte=null;startDateGte=null;crossCuttingPriorityCode=null;cpvCode=null;performanceOfDelivery=null;sortQuery=sortStatus;orderBy=asc;onlyTenders=false;topicListKey=topicSearchTablePageState>

### *MSCA Postdoctoral Fellowships*

*The goal of MSCA Postdoctoral Fellowships is to **enhance the creative and innovative potential** of researchers holding a PhD and who wish to acquire **new skills** through advanced training, international, interdisciplinary and inter-sectoral mobility. MSCA Postdoctoral Fellowships will be open to **excellent researchers** of any nationality. The scheme also encourages researchers to work on research and innovation projects in the non-academic sector and is open to researchers wishing to reintegrate in Europe, to those who are displaced by conflict, as well as to researchers with high potential who are seeking to restart their careers in research.*

*Through the implementation of an **original and personalised research project**, MSCA Postdoctoral Fellowships aim to foster excellence through training and mobility and to equip researchers with new skills and competences in order to identify solutions to current and future challenges. Postdoctoral researchers are **encouraged to reach out to society at large** to make the results of their research visible to citizens.*

### *Expected impact*

*Proposals under this Action should contribute to the following expected impacts:*

- *Enhance the creative and innovative potential of researchers holding a PhD and wishing to diversify their individual competences and skills through advanced training, international, interdisciplinary and inter-sectoral mobility while implementing excellent research projects across all sectors of research;*
- *Strengthen Europe's human capital base in R&I with better trained, innovative and entrepreneurial researchers;*
- *Enhance the quality of R&I contributing to Europe's competitiveness and growth;*
- *Contribute to Europe's attractiveness as a leading destination for R&I and for good working conditions of researchers;*
- *Facilitate knowledge transfer and brain circulation across the ERA;*
- *Foster the culture of open science, innovation and entrepreneurship.*

## A note on secondments and non-academic hosting opportunities

Hosts can be from the academic sector, and multiple academic and/or **corporate hosts** can be included in a proposal in the form of what are called “**secondments**”. Related information<sup>5</sup> (SK **emphasis** in quote below):

### *Secondments*

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<sup>5</sup><https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/opportunities/topic-details/horizon-m-sca-2022-pf-01-01;callCode=null;freeTextSearchKeyword=;matchWholeText=true;typeCodes=1,0;statusCodes=31094501,31094502,31094503;programmePeriod=2021%20-%202027;programCcm2Id=43108390;programDivisionCode=43108473;focusAreaCode=null;destination=null;mission=null;geographicalZonesCode=null;programmeDivisionProspect=null;startDateLte=null;startDateGte=null;crossCuttingPriorityCode=null;cpvCode=null;performanceOfDelivery=null;sortQuery=sortStatus;orderBy=asc;onlyTenders=false;topicListKey=topicSearchTablePageState>

Researchers receiving a Postdoctoral Fellowship may opt to include a **secondment phase**, within the overall duration of their fellowship **in any country worldwide**. The secondment phase can be a **single period or be divided** into shorter mobility periods.

For European Postdoctoral Fellowships, secondments **cannot exceed one third of the requested duration** of the action (excluding from the duration of the action any additional period for a non-academic placement) and should be **in line with the project objectives, adding significant value and impact to the fellowship**.

For Global Postdoctoral Fellowships, optional secondments are permitted for **up to one third of the outgoing phase**. A **maximum of three months** can be spent at the start of the project at the beneficiary (or associated partners linked to the beneficiary), allowing the researcher to spend time there **before going to the associated partner** in the Third Country. This period of maximum three months will be considered as part of the outgoing phase. Secondments **cannot take place during the mandatory twelve-month return period** to the host organisation in an EU Member State or Horizon Europe Associated Country.

#### *Placements in the non-academic sector*

Postdoctoral Fellowships can provide an **additional period of up to six months** to support researchers seeking a placement at the end of the project to work on R&I projects in an organisation from the non-academic sector established in **an EU Member State or Horizon Europe Associated Country**[\[3\]](#). While this possibility is also available to fellows recruited in the non-academic sector, such a placement must be implemented at a different non-academic host organisation established in an EU Member State or Horizon Europe Associated Country[\[4\]](#). The request for such a placement **must be an integral part of the proposal, explaining the added-value for the project and for the career development of the researcher, and will be subject to evaluation**. It must be substantiated by a **letter of commitment** from the European non-academic organisation where the placement takes place[\[5\]](#). This incentive aims at promoting career moves between sectors and organisations and thereby stimulate innovation and knowledge transfer while expanding career opportunities for researchers. If the placement does not

meet the requirements (missing letter of commitment or taking place in an academic organisation or in a Third Country), the proposal will be evaluated without taking into account the placement. **This might affect the final score.**

## What

### What does funding include?

A “fellowship” is a scholarship for the entirety of the project. MSCA fellowships pay the researcher receiving the fellowship the following:

*The EU provides support for the recruited researcher in the form of*

- *a living allowance*
- *a mobility allowance*
- *if applicable, family, long-term leave and special needs allowances*
- *In addition, funding is provided for research, training and networking activities management and indirect costs*

If a project is funded, the fellow signs an employment contract with the host institution (including social security) as part of the formal Grant Agreement.

### What is submitted?

Together, the potential fellow and the host complete an **application/proposal**, often with the potential fellow writing the scientific and biographic parts of the proposal and having the host comment on text written by the potential fellow and sometimes a support person from the host institution’s project office (if they have one) assists in this process.

National Contact Points are also typically available for reviewing applications if the potential fellow submits the proposal before a certain deadline. List of National Contact Points:

<https://msca-net.eu/contact-points/>

These proposals must include **training activities and a career development plan**, as noted on the portal (links above; SK **emphasis**):

*Training activities*

The training activities implemented under the Postdoctoral Fellowships should include training for **key transferable skills[6]**, **foster innovation and entrepreneurship**, (e.g. **commercialisation of results, Intellectual Property Rights, communication, public**

engagement and citizen science) and promote Open Science practices (open access to publications and to research data, FAIR data management, etc.).

#### *Career Development Plan*

In order to equip MSCA postdoctoral fellows with skills that enhance and expand their career opportunities inside and outside academia, a **Career Development Plan should be established jointly by the supervisor(s) and the researcher**. In addition to research objectives, this plan should **comprise the researcher's training and career needs, including training on transferable skills, teaching, planning for publications and participation in conferences and events aiming at opening science and research to citizens**. The Plan will have to be submitted as a **project deliverable at the beginning of the action and can be updated when needed**.

MSCA additionally has a Green Charter, which proposal writers should be familiar with when writing their proposal. If funded, “[A]t final reporting stage, **all MSCA projects will be asked to report on the ways they have sought to minimise the environmental impact of their research activities and how they applied the principles of the Green Charter**.” See: <https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-green-charter>; quote about:

*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*
- *share ideas and examples of best practice*

# Where/how

## Official instructions

Applications are submitted through the EU Funding & tenders portal. Official instructions from the MSCA page:

*You will need to*

*develop an application jointly with your chosen host organisation  
submit your application to an open funding call published on the [Funding and Tender Opportunities Portal](#)*

The application is submitted through the EU Funding & tenders portal, and you need to:

- Set up an account, if you don't have one, in order to start the submission procedure
- Download the official template for the application year
  - 2022 official template at:  
[https://rea.ec.europa.eu/system/files/2022-08/Tpl\\_Application%20form%20%28Part%20B%29%20%28HE%20MSCA%20PF%29\\_v2.0.pdf](https://rea.ec.europa.eu/system/files/2022-08/Tpl_Application%20form%20%28Part%20B%29%20%28HE%20MSCA%20PF%29_v2.0.pdf)
  - **VERY IMPORTANT NOTE: The template changes every year, so be sure you have the current year's template and not an outdated version.**
- Submit the proposal.

## MSCA-NET: A helpful resource

MSCA-NET is a project that's been created to assist National Contact Points for MSCA fellowships; see more details about MSCA-NET at:  
<https://msca-net.eu/the-project/about-msca-net/>

They have created an indispensable handbook walking applicants through the proposal writing process and including sample evaluation comments:  
[https://msca-net.eu/wp-content/uploads/2022/07/MSCA\\_PF\\_handbook\\_final.pdf](https://msca-net.eu/wp-content/uploads/2022/07/MSCA_PF_handbook_final.pdf)

MSCA-NET typically provides an updated handbook every year so that potential fellows are aware of any changes to the official template and so on.

As noted in the manual (page 2 of the PDF above include a linked Table of Contents), applications typically include the following parts:

- Part A, administrative form filled out online
  - General information (acronym, proposal title, scientific area,
  - descriptors, abstract, declarations)

- Participants
- Budget
- Ethics and security
- Other questions
- An abstract
- Part B-1, with subsections (10 page limit):
  - 1. Excellence (weighting 50%)
  - 2. Impact (weighting 30%)
  - 3. Quality and efficiency of the implementation (weighting 20%)
- Part B-2, with subsections (no page limits):
  - CV of the researcher (~5 pages)
  - Capacity of the Participating Organization(s)
  - Additional ethics information
  - Additional information on security screening
  - Letter(s) of commitment from associated partners (only for hosts of outgoing phase of Global Fellowships or non-academic placement)

## Common mistakes in submitting a proposal

An official overview of this topic is available at:

<https://rea.ec.europa.eu/system/files/2022-05/Most%20common%20mistakes%20in%20MSCA-PF%20submission%20forms.pdf>

## When

### Deadlines and announcements

Calls for fellows typically open in **April or May** each year, with a **mid-September deadline**. Specifics for each year are posted to the official MSCA pages at:

<https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships>

Decisions are usually announced in spring of the following year; the official MSCA Twitter page is very helpful in this regard and provides information about the number of submissions and expected date for results at:

<https://twitter.com/MSCActions>

<https://www.facebook.com/Marie.Curie.Actions>

<https://www.facebook.com/groups/188246948378732>



*Above: Screenshot of official page the day after the deadline, with anticipated announcement date.*

## Evaluations

- Typically 8 scientific panels (Chemistry, Social Sciences and Humanities, Economics, Information Science and Engineering, Environment and Geosciences, Life Sciences, Mathematics, Physics)
- At least 3 evaluators
- 0-5 possible points for each criterion
- $70/100$ =threshold point (remember, if you are scored less than 70, you cannot resubmit the following year).

## If awarded, administrative process timeline

These details are often included in the proposal itself and are helpful to keep in mind:

- **Grant agreement within three months** of award announcement
- Earliest start date=one month after Grant Agreement signed
- Latest start date=12 months after Grant Agreement signed (extraordinary exceptions possible)

# Case study details 1: M

## Summary of student profile:

- Defended dissertation week before submission deadline at Czech institution
- Applied for European Fellowship
- One host in Germany
- Proposal created mostly during summer 2022 for submission on September 14, 2022

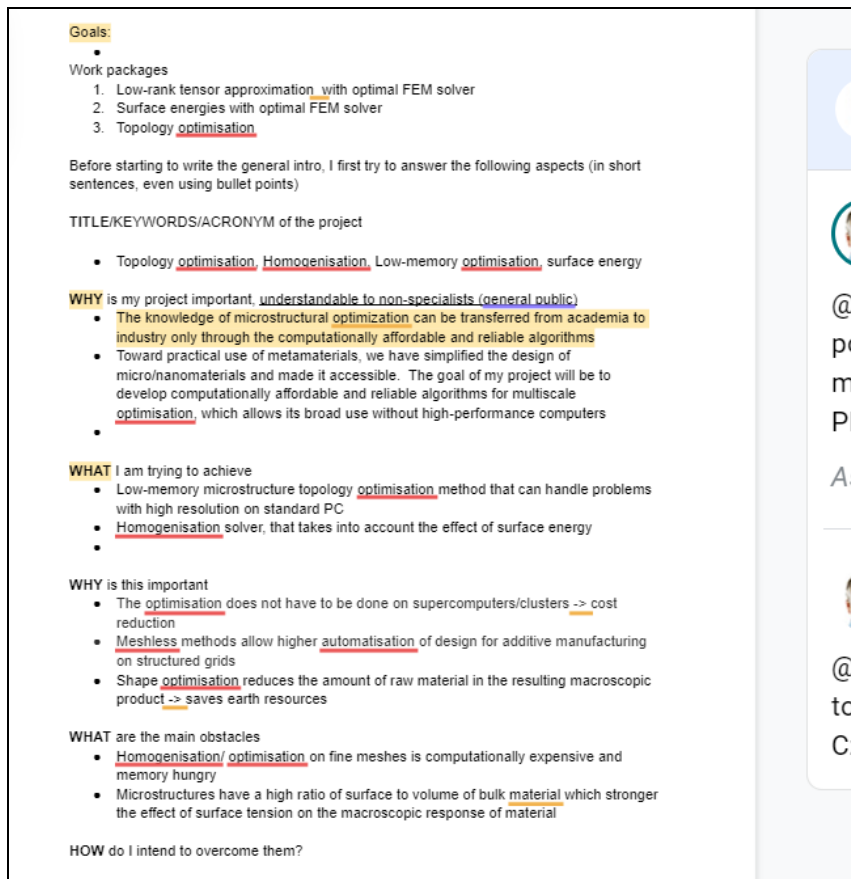
## Process

With this proposal writer/student, we timed the creation of the MSCA proposal in conjunction with other postdoctoral fellowship deadlines and his doctoral defense. His prior (funded) work abroad contributed to his creation of a one-page proposal, prompted by his doctoral mentors, in late 2021/early 2022. This proposal already contained the idea for the project, including the role of the host for postdoctoral opportunities. The host mentor was eager to assist with proposal creation due to previous long-term collaboration and publication activities.

## Late 2021/early 2022:

- Started with one-page proposal, refined with mentors

The task of creating this proposal was not easy for the student and SK together with the student's mentors went through several iterations in refining it, but the writing of the concise proposal helped sharpen the scientific ideas that were later expanded in the scientific part of the MSCA proposal, including early ideas for the aforementioned collaborative activities with his potential host in Germany.





















*Screenshot: Early sketch of one-page proposal in collaborative Google Doc, using framing questions to assist the student in thinking through what he should write.*

The final form of the one-page proposal was a narrative text that took into account the early “framing” questions, but flowing more smoothly in a way that could later be used to construct the proposal introduction and expanded in the state-of-the art sections.

- Attended training sessions (Germany & Czech Republic) by NCPs/universities

In the spring, the student also attended MSCA proposal writing training sessions organized by National Contact points, both at his home institution and at the proposed host institution. Both sessions provided the student and “us mentors” with up-to-date information and pointers for creating the 2022 proposal. The student stored presentation materials in Google Drive, so we could all later refer to the materials as needed to ensure we hadn’t forgotten anything important in the proposal itself.

Name
 Copy of Part B1: 25.8 
 Part B1: old copy.docx 
 Table 5.1 and 5.2.docx 
 Timing outline_template 
 Zeitplan 2022_23 AdvanceMent-academia (2).pdf 
 Information Infrastructre UFR.pdf 
 MSCA_PF_handbook_final.pdf 
 3 NM MSCA presentation June 2022.pdf 
 4 EvC_PPP_MSCA Masterclass.pdf 

*Above: Google Drive space with several of the archived presentations. There were even more materials, but they have been removed from this document to maintain privacy. M notes the file naming system was “organic” and not systematically designed.*

- Prior authorial collaboration with MSCA mentor

The student, at the same time, was also finishing a paper jointly authored with his mentors and the potential MSCA host. This solidified the relationship with the potential host, as did the paper review (and ultimate transfer to another journal) process.

- Virtual collaboration with doctoral mentors

Most of the collaboration with doctoral mentors past this point, in addition to “normal” doctoral student meetings with them, happened within Google Docs. As the student built different sections of the proposal, we then asked them to review work on the various sections as we went. This way, the student could move on to different sections of the proposal knowing the previously “built” sections were in good shape before moving on to the next sections. SK and the student decided on a strategy beginning with the “easiest” parts of the proposal first: the CV of the researcher (B-2, ~5 pages), then moving on to the B-1, the scientific excellence, quality and efficiency of the proposed implementation, and impact parts of the proposal, as described below.

May 2022

- Timeline with milestones, to coordinate efforts



Since this doctoral candidate was concurrently finalizing his dissertation and defense, SK and the student together made a timeline of planned activities, which we referred to in most meetings in the early stage of the proposal writing process and less frequently towards the end of the process, and deadlines became more real. This simple (Google Sheet) but effective tool helped both SK and the student stay on track, though we did not succeed in finalizing as many other proposals as initially planned, which is fine because they can be attempted in the future.


A	B	C	D	E	F	G	H	I	J
<b>When?</b>	<b>What?</b>								
By May 30 (while SK is in t	Create folder with details for Marie-Curie, <a href="https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships">https://marie-sklodowska-curie-actions.ec.europa.eu/actions/postdoctoral-fellowships</a>								
	Download DFG template from system at: <a href="https://elan.dfg.de/my.policy">https://elan.dfg.de/my.policy</a>								
	Create DFG outline (in PDF: state-of-the-art, project-related publications, objectives and work programme, bibliography, supplementary materials, CV, host institution statement)								
	Review Humboldt online system at: <a href="https://www.humboldt-foundation.de/en/apply/sponsorship-programmes/humboldt-research-fellowship#h12172">https://www.humboldt-foundation.de/en/apply/sponsorship-programmes/humboldt-research-fellowship#h12172</a>								
	Review Humboldt guidelines (PDF in folder, April 30 by SK) + curriculum vitae (two pages max), research outline ( five pages max), complete list of your publications (cf. s								
June	Start with shortest on, Humboldt, then move on to DFG and MC								
July	July 30, deadline for Humboldt								
August	Submit DFG (rolling deadline)								
September	Sept 14, deadline for MC								
				Questions for Lars and c.					
	submission of dissertation			make a screens	shot of elan, what kind of DFG project to choose			ask them if they can lead me over the re	
	defence time	6.9.2022		Aks for DFG project example					

*Above: simple Google Sheet timeline used with doctoral candidate*

- Google Drive space

To supplement the timeline, the student also made a Google Drive space for the various proposals, including MSCA. Screenshot below of this is cropped for privacy purposes.

-  Humboldt\_Research\_Fellowship
-  Walter\_Benjamin\_Programme
-  GAČR\_IF\_2022
-  CV\_video

 Timeline for DfG, Humboldt, MC proposal prep 

- Weekly check in meetings online

Importantly, SK and the student met weekly from May to September on Zoom (and sometimes Google Meet). This time together allowed us to discuss not only the MSCA proposal, but also other activities (including dissertation-related activities) the student was performing at that time. The virtual format of the meeting was useful, since the

student was in various locations in Europe at that time, for a short-term research placement, for personal reasons, and for an in-person conference. These meetings were highly effective and invaluable, in SK's opinion. M agrees, and recommends to others as well.

July 2022

- B-2: CV of the researcher and initial drafts of other B-2 parts

Work on the MSCA proposal began in earnest with the B-2 (note that the student created two collaborative documents based on the template, for the B-1 and B-2 parts, in order to make collaborative review later down the road easier for all parties).

For this section, we carefully followed guidelines laid down in the MSCA handbook, pp. 36-37 (screenshots directly below).

### **Part B2 (no overall page limit applied)**

#### **4. CV of the researcher (indicative length: 5 pages)**

Any information provided in Parts A and B of the proposal should be fully consistent. Always mention full dates (using format: dd/mm/yyyy). The CV should include the standard academic and research record. Any research career gaps and/or unconventional paths should be clearly explained.

- Follow the provided template and add other headings if required.
- It is important to use the full 5 pages and include all your areas of experience (e.g., teaching, reviewing, consultancy, intersectoral experience, supervision, event organisation, public outreach etc.).
- Please note that what you mention here will also be considered by the evaluators in relation to Section 1.4 of Part B1.

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At a minimum, the CV should contain:

- a) The name of the researcher;
- b) Professional experience (most recent first, with exact dates in format dd/mm/yyyy);
- c) Education, including PhD award date (most recent first, with exact dates in format: dd/mm/yyyy).

The CV should include information on:

- Publications in peer-reviewed scientific journals, peer-reviewed conference proceedings, and/or monographs (they are expected to be open access either published or through repositories) and other outputs such as data, software, algorithms significant for your research path (they are expected to be open access in appropriate repositories to the extent possible; they should be accompanied by a very short qualitative assessment of their scientific significance and not by the Journal Impact Factor);
- Invited presentations to internationally established conferences and/or international advanced schools;
- Organisation of international conferences, including membership in the steering and/or programme committee;
- Research expeditions led by the researcher;
- Granted patent(s);
- Examples of participation in industrial innovation;
- Prizes and Awards;
- Funding received so far;
- Supervising and mentoring activities;
- Other items of interest.

- You must provide a list of achievements reflecting your track record. Your track record is evaluated against other researchers in your career stage, discipline and sector (academic/non-academic):
  - E.g., publications/conference participations, granted patents, monographs, book chapters, examples of leadership in industrial innovation.
- If you are not the first or lead author on publications, briefly explain your contribution.

Applicants who have successfully defended their doctoral thesis *before* the call deadline but who have not yet formally been awarded the doctoral degree must clearly indicate the date of the successful PhD defence (“viva”). Researchers having their last thesis defence *after* the call deadline will be automatically declared ineligible for this call.

The student also started drafts for the host institution to review for the remaining B-2 parts, and upon completing these, he sent the B-2 to his mentors and the host institution’s EU office contact for their review so that they would have ample time for commentary prior to the final proposal review later down the road. In SK’s opinion, this made the review work slightly easier for all parties involved.

The student also drafted the letter of commitment early on, giving the host PI enough time to prepare it prior to the summer holidays and not in the “September rush.”

Screenshots below are from the MSCA 2022 handbook (pp. 37-41), included here to make it easier for future readers to understand what information they will need to gather for their host

organization to review, if the host institution does not proactively take on the task of drafting the initial text.

Importantly, in the case of this student, he was able to ask the EU office at his host institution for a list of common impact-related activities when sending the B-2 for their review, which meant we could use this information when drafting the B-1 impact statement down the road. This was extremely helpful.

## 5. Capacity of the Participating Organisation(s)

Please provide an overview list of all participating organisations (the beneficiary and, where applicable, all associated partners) using template table 5.1 below, and more detailed information for each of the participating organisations (using a separate table for each organisation) using template table 5.2 below.

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MSCA POSTDOCTORAL FELLOWSHIP HANDBOOK 2022

MSCA-NET



Any inter-relationship between the participating organisation(s) or individuals and other entities/persons appearing (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, etc.) must be declared in the proposal.

Applicants should provide additional information regarding the administrative/legal relations between the department carrying out the work as described in the table below, and the entity/entities mentioned in Part A of the proposal (i.e. linked to the given Participant Identification Code – PIC).

Should the proposal be shortlisted for funding, all participating organisations will have to be registered with the European Commission's [Participant Register Services](#). Therefore where this information is [already known](#), please provide in Table 5.1 the (draft or validated) nine digit [Participant Identification Code](#) (PIC) for the beneficiary and, where applicable, each associated partner.

### 5.1 Template table: *Overview of Participating Organisations*

Organisation role	PIC	Legal Entity Short Name	Academic organisation (Y/N)	Country	Name of Supervisor
Beneficiary					
Associated partner linked to a beneficiary (if applicable)					
Associated partner for outgoing phase (mandatory for GF)					
Associated partner for secondment (optional)					
Associated partner for non-academic placement (optional)					
Other:					

- The word “optional” refers to the fact that the secondment and non-academic placement is optional within the proposal (not a mandatory element of the application). If it is part of the proposal, it needs to be addressed here.

### 5.2 Template table: *Capacity of the Participating Organisations*

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MSCA POSTDOCTORAL FELLOWSHIP HANDBOOK 2022



Please complete a separate table for each participating organisation. For the beneficiary, this table should be maximum 1 page in length; for each associated partner, the table should be maximum ½ page in length.

- If you are applying for a Global Fellowship you need to have at least 2 tables. One for the beneficiary in MS/AC and another one for the host organisation (associated partner) in third countries. For associated partner you have half a page.
- If you have an additional non-academic placement at the end of the fellowship, you also need to have 2 tables. One for the beneficiary in MS/AC and another one for the non-academic partner (associated partner) in MS/AC. For associated partner you have half a page.
- If you are applying for a Global Fellowship and you have an additional non-academic placement you need to have 3 tables. One for the beneficiary in MS/AC (1 page) and another one for the host organisation (associated partner) in a third country, and one for the non-academic partner (associated partner) in MS/AC.
- If you have secondments in your proposal, additional ½ page table needs to be for secondment host organisation.

Choose one of:

? *Beneficiary (compulsory)*

? *Associated partner linked to a beneficiary (if applicable)*

? *Associated partner for outgoing phase (compulsory for GF only)*

? *Associated partner for secondment (optional)*

? *Associated partner for non-academic placement (optional)*

- You can delete non selected type of organisation.

**[Full name + Legal Entity Short Name + Country]**

**General description**

**Role and profile of supervisor**

**Key research facilities, Infrastructure and Equipment**

*Demonstrate that the beneficiary has sufficient facilities and infrastructure to host and/or offer a suitable environment for training and transfer of knowledge to the recruited experienced researcher.*

*If applicable, indicate the name of the associated partner linked to a beneficiary and describe the nature of the link in the corresponding table.*

- List the particular infrastructure and/or equipment available to you and your project, along with the facilities and amenities that

	will be available to you for your training and transfer of knowledge.
<b>Previous and current involvement in EU-funded research and training programmes/actions/projects</b>	<i>Indicate up to 5 relevant EU, national or international research and training actions/projects in which the institution/department has previously participated and/or is currently participating.</i>

## 6. Additional ethics information

Additional information that could not be included in Part A of the proposal (if needed).

- 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.
- 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 pose 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.

## 7. Additional information on security screening

Additional information on security aspects that could not be included in Part A of the proposal (if needed).

## 8. Letter(s) of commitment from associated partners (only for hosts of outgoing phase of Global Fellowships or non-academic placement)

Use this section to add scanned copies of the letter(s) of commitment, if applicable.

### Minimum requirements:

- With heading or stamp from the institution;
- Up-to-date document, i.e. not dated prior to the call publication;
- Demonstrating the will to actively participate in the (identified) proposal;
- Explanation of the precise role.

Any additional information the organisation deems useful can be added in the letter.

Note that the expert evaluators will be instructed to disregard the contribution of any associated partners for which no such evidence of commitment is submitted.

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In case the letter fails to provide enough information on the associated partner's role and/or enough assurance of 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.

For GF proposals, and for all proposals requesting a non-academic placement, the absence of a letter of commitment will render the proposal inadmissible and the proposal will not be evaluated.

- For the non-academic placement, the absence of a letter of commitment will not make the entire proposal ineligible. The proposal will be evaluated without taking into consideration the role, relevance and added-value of the non-academic placement, which might affect the final score.

Suggestions for the letter of commitment:

- Name the project clearly and demonstrate that the third country host will actively participate in the Global Fellowship. For example:  
"We commit to project XYZ under the MSCA Global Fellowship. We plan to host Dr. X as an experienced researcher for Y months in the period year1 – year 2. Dr. X shall carry out YXABC tasks and research, under the supervision of Dr./Prof. XX, in order to achieve goal(s) ABC", etc.
- Give the correct date on the letter! It is not recommended to use old letters for former submissions.
- Even if electronically submitted, a proper scan with a real signature is considered good form. - Someone with authority should sign the letter, as indicated in the template.

**Non-binding example of template letter of commitment for PF associated partners:**

**Non-binding example of template letter of commitment for PF associated partners:**

I undersigned *[title, first name and surname]*, in my quality of *[role in the organisation]* in *[name of the organisation]* commit to set up all necessary provisions to participate as associated partner in the proposal *[proposal number and/or acronym]* submitted to the call HE-MSCA-PF-2022, should the proposal be funded.

On behalf of *[name of the organisation]*, I also confirm that we will participate and contribute to the research, innovation and training activities as planned in this project. In particular, *[name of the organisation]* will be involved in *[free field for any additional information that the participating organisation wishes to indicate in order to describe its role and contribution to the project]*.

I hereby declare that I am entitled to commit into this process the entity I represent.

*Name, Date, Signature*

## August 2022

- B-1: Scientific part in template & definition of scientific work packages (WPs)

Next, the student and SK moved on to B-1, starting with the scientific part. The student started by using the template and prior proposal efforts, inserting these into the template, and then refining these. SK answered questions about how “deep” the state-of-the art should be, and the handbook was extremely helpful to both of us in answering questions in this stage. When the student finished the B-1 scientific part, he sent it to the mentors and to his potential host PI for their review (the host PI was on holiday during most of this period, but other mentors could “chime in” earlier, improving the text).

- B-1: Impact part writing, defining work packages.

The student then went on to sketch out thoughts for the impact part and to refine/define work packages. While the scientific work packages were fairly straightforward, the impact- and project management-related tasks, milestones, and deliverables were more difficult to draft and refine. Thus, the student enlisted the help of a Google Sheet timeline, from which he expanded in the draft proposal in text format. The impact section is, for most MSCA proposal writers, the most difficult to write, but the MSCA handbook provided helpful tips, including use of tables, which were essential in the drafting of this section.

1	Project start	April 2023		April 2023	
2				April 2025	
3	Activity	Date	Month	Type of activity	
4	Research gate project launched	April 2023	1	Communication	
5	Career plan drafted	April 2023	1	Management	
6	Project announced at the ResearchGate and promoted by Lars a	April 2023	1	Communication	
7					
8	Course: <a href="#">Topology Optimization - Theory, Methods and Application</a>	May 2023	2	Training	
9	17th U. S. National Congress on Computational Mechanics	Jun 2023	3	Dissemination	
10	Career plan update #1	September 2023	6	Management	
11	<a href="#">Begin: Advanced Speaking and Writing in Academic Contexts</a>	September 2023	6	Training	Join
12	The Science Days take place every autumn - Germany's largest	October 2023	7	Communication	<a href="#">https</a>
13	<a href="#">End: Advanced Speaking and Writing in Academic Contexts</a>	December 2023	9	Training	
14	Efficient communication in leadership and teamwork I and II	December 2023	9	Training	<a href="#">Adv</a>
15	Preprint #1	December 2023	9	Dissemination	

*Screenshot: cropped (for privacy) screenshot of timeline for non-scientific activities (management, training, dissemination, and communication).*

- Initial version to NCP (one month before deadline) and EU host office

Following drafting at this point, with still a Gantt chart missing and still slightly over the 10-page limit, the student forwarded the proposal for initial review by the CZ National Contact Point and the EU host institution office. Feedback from the EU host institution

came first, and National Contact Point (NCP) feedback came the day of the submission deadline, but it was received. M recommends forwarding a “current state of the proposal” every week to the NCP or providing them with access to the shared file, so they can see version changes in the final month

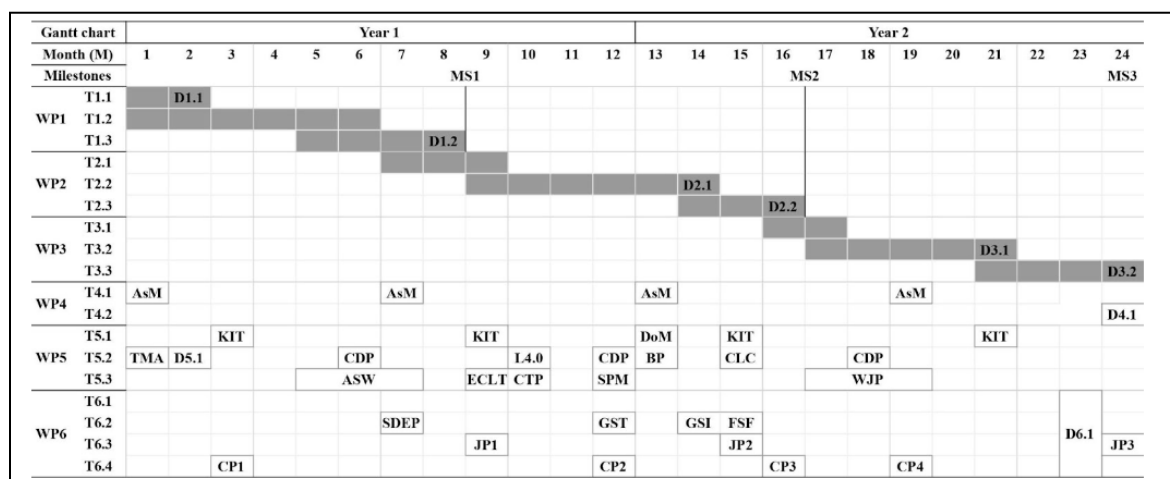
- Review by mentors and host institution PI

Once the main draft was completed, the student sent the document for scientific review to his mentors and the host institution PI, so that they had ample time for review in-between holidays and prior to the mid-September deadline.

## September 2022

- Final work package definition and Gantt chart

Towards the end of the drafting stage, the student refined the work packages and completed a Gantt chart. Checking the handbook to ensure all guidelines were met, we noticed that the project and the Gantt chart were missing milestones, so the student added these at the end.



Above: Gantt chart created by student.

Note that the proposed project had six work packages, with WPs 1-3 being scientific in nature, WP4 devoted to project management, WP5 to training and transfer of knowledge, and WP6, to dissemination and communication.

- Editing over 10 pages to 10 pages (strict page limit)

With all sections in hand, the student, under SK's guidance, began editing the document down to 10 pages. Easy formatting changes were made first, followed by re-reading and re-editing of all sections.

- Abstract drafting

The student then drafted an abstract, and SK performed initial editorial suggestions prior to review by the rest of the reviewers.

- Final review by host, mentors, and selected others

Following this, a final request for review of the proposal and the abstract was made to mentors and the host institution PI, with suggested edits integrated as they were received.

- Submission in EU system; drafts updated with final commentary

To make sure the proposal was entered properly into the system, the student uploaded drafts prior to final review and commentary into the EU system, re-writing drafts with updated documents integrating final review commentaries. The proposal was submitted thus on time without and EU system hitches.

## Case study details 2: C

### Summary of postdoctoral researcher's profile:

- Active postdoctoral researcher in Austria
- Applied for European Fellowship
- Host in the Czech Republic plus 2 secondments in Europe
- Proposal created during summer 2022 for submission on September 14, 2022

### Process

#### First half of 2022

- Started with scientific proposal, modified for this purpose

As was the case with student M, researcher C had a scientific idea in mind prior to embarking on writing of the MSCA proposal. She also had identified a host institution PI,

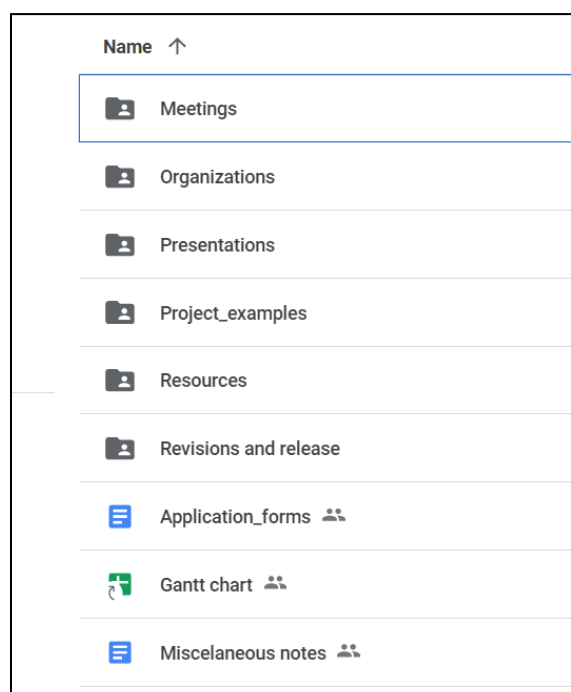
someone with whom she has collaborated with over time, including as co-authors on papers. The proposed host institution PI reached out to SK's co-mentorship colleague at CTU in Prague for assistance in organizing proposal preparation.

- Kick-off meeting with MSCA mentors (including SK) and host via Zoom

The researcher, SK and her mentorship colleague, and her host institution PI kicked off our work together with a virtual meeting to discuss our planned process and where we could be of assistance to one another.

- Timeline with milestones, to coordinate with author's summer holidays

As with student M, we created a timeline for the researcher's review, which we modified in her case to include a late August summer holiday. This served once again as a guidepost for all collaborators in making sure we made careful progress towards the submission deadline.



*Above: sample of Google Drive folder space created for the researcher*

- Google Drive space

The timeline and other materials related to the proposal were, as was the case for student M, stored in a collaborative Google Drive space.

July 2022

- B-2: Virtual meeting about CV and CV editing

SK and the researcher then met about her CV, which (as with student M) was the easiest part to draft. SK's colleague, in the meantime, assisted with the rest of B-1, drafting host institution texts for review by the researcher and the proposed host institution PI. The researcher took her pre-existing CV and placed it into the format needed for this proposal, and SK suggested edits. The researcher checked changes and order of items on the CV with the MSCA handbook. The CV was then sent to the review committee for their commentary, which the researcher integrated into the proposal.

- B-1: Scientific part placed in template and refinement of scientific content

Following this, the researcher continued forward by finalizing the scientific (excellence) part of the proposal, then sent to reviewers for initial commentary.

- B-1: Impact part writing

SK's colleague assisted with the writing of the impact part, as host institution representative, with the researcher. SK made editorial and content suggestions, and then the researcher carefully checked the draft text against the MSCA handbook to ensure nothing was missing and that everything was in the correct place.

Activity	Target audience	Where	Performance indicator
Project launch	Public at large	Personal and institution webpage, social media	50 page views from 20 unique visitors
Public Seminar	University students and staff	Hybrid (on-site, on-line)	20 attendees real-world, 15 virtual
Open day	High-school students		1 application
Networking event	Researchers/ Public at large		20 attendees real-world, 55 virtual
Preparation of conference	Researchers		N/A
Presenting at conference	Researchers		60 attendees
Announcement	Public at large		50 page views from 20 unique visitors
Seminar	Researchers/ Public at large		20 attendees real-world
Presenting at Microsite	Researchers		50 attendees
Interview summarizing the fellowship experience	Public at large		50 page views from 20 unique visitors

*Above: sample dissemination and communication summary table, with identifying information removed.*

- B-1: Defining impact work packages

With the draft text in place, the researcher could then move on to the non-scientific work packages, as was the case with student M.

- Initial version to the Czech NCP

SK's co-mentorship colleague submitted the proposal to the Czech National Contact point prior to the researcher's late August holiday.

I was wondering if you were willing to review the proposal and send us some suggestions on what should be improved? Besides, because Part B1 is now 12 pages long (excluding the Gantt chart), we would appreciate your opinion on which parts should be removed/shortened.

Many thanks in advance for your consideration. If possible, we would like to receive the feedback by Friday, 2 September, to have enough time to incorporate your comments.

Kind regards,

*Above: except of email request to Czech National Contact Point (parts related to researcher's identify removed).*

## September 2022

- Gantt chart

Following feedback from reviews (all but the National Contact Point at this stage), the researcher created the Gantt chart.

WP1 (1-2, module 1-5), and WP3 (1-5, module 2-5).

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24
WP1						D1.1 M1																		
WP2										D2.2 M2					D2.3									
WP3																M3			D3.2				D3.3	
WP4	D4.1	D4.2 D4.3																					D4.4	D4.5
WP5						ATP		KRE										DFG						
WP6		PL1					OSI NS1	PP1						MUR	PP2		PMW			PDE		GAM	PL2 NS2	PP3
Secondments/short visits										IRE						DE						CZ		

*Above: researcher's Gantt chart. Note the inclusion of two secondments and a short visit (proposed for Germany, the Czech Republic, and Ireland).*

WPs 1-3 were scientific in nature, followed by project management (WP4), training and transfer of knowledge (WP5), and dissemination and communication.

- Editing over 10 pages to 10 pages and abstract

The researcher and SK then embarked on a series of edits across the entire document to ensure the proposal would fit within 10 pages. SK provided suggestions in this regard, which the researcher accepted or rejected. After several iterations, the page limit was reached. The researcher also completed the abstract, drafted earlier, and together with reviewers edited it down to the required amount of characters.

- Final review by host, mentors, and selected others

The final versions were reviewed by the review committee, and helpful feedback from the National Contact Point was received several days before the submission deadline. As was the case with student M, researcher C made sure everything was ready in the EU system days before the actual deadline, to avoid any problems with the system on deadline day, with revision documents uploaded as they were prepared by the researcher.