MSCA-NET

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COFUND HANDBOOK CALL 2022

Deliverable 3.4.

NETWORK OF THE MARIE SKŁODOWSKA-CURIE ACTIONS NATIONAL CONTACT POINTS

Task 3.4.	Handbooks
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Abbreviations

AC – Countries associated to Horizon Europe Programme
CA – Consortium Agreement
COFUND D – COFUND Doctoral Programmes
COFUND P – COFUND Postdoctoral Programmes
EC – European Commission
FAQ – Frequently Asked Questions
GA – Grant Agreement
GAP – Grant Agreement Preparation
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

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 COFUND Call with the deadline of 9TH February 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 COFUND***.

This document may not be considered in any way as deriving from and/or representing the views and policies of the European Commission 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.

Acknowledgements

We thank our NCPs colleagues, task members from the MSCA-NET project and the EC / REA Staff for consulting 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***, and proposal templates, and **Standard application form (HE COFUND D/P)**, downloaded from the call webpage on the ***Funding & Tender Opportunities Portal***. In the mentioned Portal you may also find **additional support service** (e.g., support videos). 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 COFUND essentials

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

MSCA COFUND DEADLINE	❖ **9th February 2023, 17:00 Brussels time** ❖ You can submit your application at any time before the deadline, however we strongly encourage you to submit your proposals as soon as possible. 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!
PARTICIPATING ORGANISATIONS	❖ Legal entities that fund or manage Doctoral Programmes or Postdoctoral Programmes for researchers, or that recruit, supervise, host or train researchers. ❖ Participating organisations (beneficiary and both Implementing/ Associated partners) can be from the academic sector or the non-academic sector:
BENEFICIARY	❖ Mono-beneficiary action - only one legal entity established in an EU MS or HE Associated Country will apply to the COFUND scheme through the Funding and Tenders Portal, as beneficiary. ❖ Beneficiary is the sole signatory to the Grant Agreement, which receives the EU funding, claims costs, and takes complete responsibility for the proper implementation of the proposed Programme, including submission of required reports, as a formal commitment. ❖ Must be a legal entity established in an EU Member State or HE Associated Country that funds or manages Doctoral Programmes or Postdoctoral Programmes for researchers.
IMPLEMENTING PARTNERS	❖ Legal entities receiving financial support from the beneficiary and implementing the MSCA COFUND Doctoral or Postdoctoral Programme. ❖ Implementing partners can employ researchers. ❖ Implementing partners that recruit researchers in the context of a Doctoral or Postdoctoral Programme must be established in an EU MS, the Overseas Countries and Territories (OCTs) linked to the Member States, HE Associated Country, or low- and middle-income third countries included in the list of countries eligible for funding provided in the Horizon Europe Programme Guide. ❖ Implementing partners known at the proposal stage must be listed in section 5 of the part B2, and they are not added to Part A. ❖ For each implementing partner, known at proposal stage, a Letter of Commitment is required.
ASSOCIATED PARTNERS	❖ Entities which participate in the action (e.g., providing training or secondments), but without the right to charge costs or claim contributions. ❖ Associated partners may not employ the researchers under the action. ❖ Associated partners can be established anywhere in the world and can be from any sector. ❖ Associated partners known at the proposal stage must be included under the participants section in the part A of the proposal as well as in the relevant section in the part B2 (section 5). ❖ For each associated partner, known at the proposal stage, a Letter of Commitment is required.

ELIGLIBLE RESEARCHERS	❖ **Doctoral Programme** Researchers must be doctoral candidates, i.e., not already in possession of a doctoral degree at the deadline of the co-funded Programme's call. Researchers must be enrolled in a doctoral programme leading to the award of a doctoral degree in at least one EU Member State or Horizon Europe Associated Country ❖ **Postdoctoral Programme** Researchers must be in possession of a doctoral degree at the deadline of the co-funded Programme's call. Researchers who have successfully defended their doctoral thesis but who have not yet formally been awarded the doctoral degree will also be considered as postdoctoral researchers and will be considered eligible to apply.
OVERALL EU CONTRIBUTION PER GRANT AGREEMENT	❖ Each application can only cover one of the two types of Programmes. ❖ A beneficiary can only receive **a maximum EU contribution of EUR 10 million per call.** ❖ If you wish to apply for both a Doctoral and a Postdoctoral Programme, or more than one Doctoral or Postdoctoral Programmes, then separate applications must be prepared and submitted. ❖ If you submit two or more successful applications totalling more than EUR 10 million within one call, you will be required to decide which of these proposals to implement at the Grant Agreement Preparation phase (GAP).
RESUBMISSION	❖ 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.
New COFUND proposal that builds on a previous successful COFUND	❖ If it is a continuation of a previous COFUND project, it can be considered as ‘’very similar’’ and the number of the previous project should be given. ❖ Even if it is mentioned that a similar proposal has already been submitted, this will be checked very carefully by REA. If after checking REA sees it is not the case, they will not consider it to be similar.

Upon fulfilling requirements for this call, have in mind the following:

PARTNERSHIP AGREEMENT	❖ When Associated and or Implementing partners are involved, the beneficiary is encouraged to sign a Partnership Agreement (PA) with them to regulate the internal relationship between all participating organisations. The PA must comply with the Grant Agreement.
LETTERS OF COMMITMENT	❖ All Implementing and Associated partners, known at the time of proposal submission, must: 1. provide a Letter of Commitment in Part B of the proposal, which explicitly states their precise role in the action and their exact and quantified financial contributions if any; 2. be included in the overview of all the identified Associated and Implementing partners provided in Table 5.1 in part B2 of the proposal. ❖ The contribution of any Implementing /Associated partner for which no such evidence of commitment is submitted, will not be taken into account during evaluation, and it can affect the final evaluation. In case potential Implementing and/or Associated partners are unknown at the

	time of application, these can be added during the lifetime of the project for both Doctoral and Postdoctoral schemes.
GENDER EQUALITY PLAN (GEP)	❖ For calls with deadlines in 2022 and beyond, the beneficiary must provide a **Gender Equality Plan** if the proposal is selected for funding, before Grant Agreement signature. The Gender Equality Plan should be accessible via the beneficiary's website.
REQUIRED DOCUMENTS	❖ Read the required documents that contain the rules and conditions for the call, the template for project proposals as well MSCA- NET frequently asked questions (FAQs) ✓ **COFUND Guide for Applicants 2022** ✓ **MSCA Work Programme 2021 – 2022** ✓ **Proposal template and instructions on how to fill it in** ✓ **MSCA-NET FAQs**
FAMILIARISE YOURSELF WITH THE SUBMISSION PROCESS	❖ Proposals must be created and submitted on the **Funding & Tender Opportunities Portal** by a contact person of the beneficiary by using the beneficiary's Participant Identification Code (PIC) number. ❖ Proposal templates (Part B) can be downloaded once the submission has been started and a proposal profile is created on the Funding & Tender Opportunities Portal. ❖ For more details on the submission process, you can consult the **Proposal Submission Service User Manual.**
UNDERSTAND WHAT IS REQUIRED FOR THE SUBMISSION	❖ **Application form (administrative data in Part A)** Part A constitutes an integral part of your proposal; it is the part of the proposal where you have fill in online submission forms (sections: general info, participants, budget and ethics/security). This part will be used during evaluation and further processing of your proposal. For more information, please refer to the **Standard application form (HE MSCA COFUND)**. In Part A, it is not required for the beneficiary or the associated partners, to fill in the list of up to five publications, relevant previous projects, or significant infrastructure. This information will need to be described in the relevant sections of Part B2 (Section 6). However, if the beneficiary wishes to emphasize information about the infrastructure or mobility programmes they are involved in, as relevant for the COFUND implementation, it can be stated in the list, otherwise it can be left blank. **The technical description (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 34 A4 pages. • The Start Page must consist of 1 whole page. • General description of the Programme/Information on the Beneficiary must consist of 2 whole pages. • Table of Contents must consist of 1 whole page. • Section 1 (Excellence) must start on page 5 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 35 and beyond) will not be made available to the evaluators and therefore will not be taken into account.

❖ **Part B2**, has no strict page limit but applicants should respect the instructions given per section:
- Section 4. Ethics
- Section 5. Partner Organisations
- Section 6. Letters of Commitment

❖ Bear in mind that formatting for Part B1 must be continued for Part B2.

All sections of the proposal will be included in the evaluation.

Applicants will **NOT** be able to submit their proposal in the submission system unless both parts B1 and B2 are provided in PDF format (Adobe version 3 or higher, with embedded fonts).
You should name your part B 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

❖ Your National Contact Point is available to help you and can be located via **https://msca-net.eu/contact-points/**

Key tips for proposal template and layout

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

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/**

✓ The proposal acronym must be placed in a header on each page in addition to already placed information: Call: HORIZON-MSCA-2022-COFUND-01-01 - MSCA COFUND 2022

✓ Check **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.

- ✓ 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 COFUND call.

- ✓ Be aware of the overall weighting of each criterion. You need to score well in all sections in order to be funded.

- ✓ **Free keywords**: Choose up to 5 (and at least 3) keywords related to your proposal, in descending order of relevance. You can also enter any words you think give extra detail about the scope of your proposal. Description on how to select the keywords is available on a **specific FAQ**[1].

2. Abstract

- ✓ The abstract is a short description of your project in maximum 2000 characters including spaces.

- ✓ The main elements are:
  - 1-2 sentences that put the project into context of promoting excellent and sustainable research training, international, intersectoral and interdisciplinary cooperation and mobility.
  - Specific aims and details of training a new generation of researchers.

- ✓ 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 ideas of existing projects in CORDIS (using filters **Projects – Horizon Europe – Marie Skłodowska-Curie actions COFUND**)

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).

[1] The specific FAQ is related to Doctoral networks call, but the procedure for selection of the keyword is applicable to all MSCA project proposals.

- ✓ **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 number 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.
  - ✓ Both Part B documents need to have a header on each page containing: the proposal acronym, and the implementation mode applied to (i.e., Doctoral or Postdoctoral).
- ✓ 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"

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 list of participating organisations added, Part B1 must not exceed **34 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 the information to fit your proposal.

Definitions and key aspects

DISCLAMER: For the purpose of this MSCA COFUND Handbook, authors may interpret official EU Definitions that are stated in the official documents for COFUND call. Any interpretation by the authors will be indicated in blue font.

DEFINITIONS	
Deliverable	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).
Impacts	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 some time after the end of the project. Example: *The deployment of the advanced forecasting system enables each airport to increase maximum passenger capacity by 15% and passenger average throughput by 10%, leading to a 28% reduction in infrastructure expansion costs.*
Milestone	Control points in the project that help to chart progress. Milestones may correspond to the achievement of a key result, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the project where, for example, the consortium must decide which of several technologies to adopt for further development. The achievement of a milestone should be verifiable.
Objectives	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.
Outcomes	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. Example: *9 European airports adopt the advanced forecasting system demonstrated during the project.*

Pathway to impact	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.
Research output	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.
Results	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'. *Example: Successful large-scale demonstrator: trial with 3 airports of an advanced forecasting system for proactive airport passenger flow management.*

ADDITIONAL DEFINITIONS and KEY ASPECTS from EC that can be useful while preparing COFUND project proposal	
Career development plan	A Career Development Plan must be jointly established by the supervisor and each recruited researcher upon recruitment. In addition to research objectives, this Plan comprises the researcher's training and career needs, including training on transferable skills, teaching, planning for publications and participation in conferences and events aimed at opening science and research to citizens. The Plan must be established at the beginning of the recruitment and should be revised (and updated where needed) within 18 months.
Critical risk	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 materialize 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.
CORDIS	The Community Research and Development Information Service – CORDIS – is the European Commission's primary public repository and portal to disseminate information on all EU-funded research projects and their results in the broadest sense. In this web service, you can find information (calls, projects, partners, contacts) about all European projects financed by Directorate-General Research.
Evaluation criteria	The criteria against which independent expert evaluators assess eligible proposals. For MSCA, they are related to excellence, impact, and quality and efficiency of implementation.

Evaluation process for MSCA	Each full proposal is evaluated by at least three experts, but in some cases more experts may be needed who know about the full range of disciplines and sectors covered by the proposal. Experts work individually. They give a score for each criterion, with explanatory comments which are indicated in the Evaluation Summary Report. After carrying out an individual evaluation, an expert will join other experts who have evaluated the same proposal in a consensus group, to agree on a common position, including comments and scores. Before notifying coordinators of the final evaluation results, the Commission reviews the results of the experts' evaluations and puts together the final ranking list for funding under the call.
ESR – Evaluation Summary Report	The Evaluation Summary Report is the assessment of the proposal following evaluation by independent experts. The ESR contains comments and scores for each criterion.
MSCA Green Charter	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 the implementation section of your project proposal: https://marie-sklodowska-curie-actions.ec.europa.eu/about-msca/msca-green-charter.
Supervision	Employers and/or funders should ensure that a person is clearly identified to whom researchers can refer for the performance of their professional duties and should inform the researchers accordingly. Such arrangements should clearly define that the proposed supervisors are sufficiently expert in supervising research, have the time, knowledge, experience, expertise, and commitment to be able to offer the recruited researcher appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms. While the **MSCA Guidelines on Supervision** are non-binding, **funded-projects are strongly encouraged to take them into account.**

Part B1

TABLE OF CONTENTS (*max. 1 page*)

[This document is tagged. Do not delete the tags; they are needed for processing.] #@APP-FORM-HEMSCACO@#

GENERAL DESCRIPTION OF THE PROGRAMME (*max. 2 pages including the information on the beneficiary below, not evaluated*)

- Although this is not evaluated, it is crucial to setting the scene for the evaluator.
- Describe the beneficiary and partner organisation (recruiting implementing partners, non-recruiting associate partners) structure.
- Describe the beneficiary and the partner organisations (if applicable). Be clear what type of beneficiary is leading the project (government funding organisation; research centre/university, etc). Consider using a diagram to illustrate the different participants and the relationship between them.
- Provide a general statement on the beneficiary's strengths (research and innovation strengths; funding achievements; industry collaboration; main research and innovation outcomes; etc). If appropriate, references to the regional or national research and innovation ecosystem could be included.
- Mention if the research carried out aligns with specific research disciplines based on national or regional Research and Innovation Strategies for Smart Specialisation (RIS3 strategies) or other regional/national strategies as appropriate.
- Mention if you will have funding synergies with Cohesion policy funds and the Recovery and Resilience Facility (RRF).
- Demonstrate how the beneficiary is the most suitable/best entity to run the Programme. Thriving research environment? Industry contacts? International networking at institutional level?
- For **Doctoral Programmes** – demonstrate successful experience with doctoral training.
- Outline the Programme and its structure.
- Introduce the size immediately: duration of the COFUND Programme (typically 36 to 60 months), how many doctoral candidates or postdoc researchers will be recruited, how many calls, the duration for each fellowship (COFUND D/P typically 12 to 36 months).
- For **Doctoral Programmes** explain enrolment arrangements for each doctoral candidate (e.g., typical time needed to complete a PhD in the corresponding country, and if it's a longer period, how it will be funded).
- Describe your COFUND Programme aims and objectives highlighting the novelty in the training programme and the gap being addressed. Describe the need and potential impact of your COFUND Programme. If possible, emphasise the alignment of the practices with the EU principles [2]of the Programme.
- For **Doctoral Programmes** remember it is not only about ''writing a PhD'' - you need to emphasise that your doctoral candidates will receive complete training.

[2] European Charter for Researchers and Code of Conduct for the Recruitment of Researchers https://euraxess.ec.europa.eu/jobs/charter

INFORMATION ON THE BENEFICIARY

Name of Beneficiary	Beneficiary Short Name	Academic (tick)	Non-academic (tick)	Country	Dept./ Division / Laboratory

Beneficiary Legal Name:	**Country:**
General Description	*Short description of the activities relevant to the action*
Role and Commitment of key persons (including supervisors)	*Including names, title and the intended extent of involvement in the action (in percentage of full-time employment) of the key scientific staff who will be involved in the research, training and supervision*
Key Research Facilities, Infrastructure and Equipment	*Outline the key facilities and infrastructure available and demonstrate that each team has sufficient capacity to host and/or offer a suitable environment for supervising the research and training of the recruited researchers*
Status of Research Premises	*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 implementing and/or associated partners in the consortium (if applicable)?*
Previous Involvement in Research and Training Programmes, including H2020/HE COFUND	*Detail any relevant EU, national or international research and training actions/projects in which the beneficiary has previously participated. Please clearly mention any previous involvement in H2020/HE COFUND funded project(s), including project(s) acronym and reference number.*
Current Involvement in Research and Training Programmes, including H2020/HE COFUND	*Detail any relevant EU, national or international research and training actions/projects in which the beneficiary is currently participating. Please clearly mention any current involvement in ongoing COFUND funded project(s), including project(s) acronym and reference number.*

START PAGE COUNT – MAX 30 PAGES

1. **Excellence** #@REL-EVA-RE@# (starting on p.5)

1.1 Quality and novelty of the selection / recruitment process for the researchers (transparency, composition and organisation of selection committees, evaluation criteria, equal opportunities, the gender dimension and other diversity aspects) and **quality and attractiveness of the appointment conditions**, including competitiveness of the salary for the standards of the hosting countries

⚠ *The following sections of the European Code of Conduct for the Recruitment of Researchers refer specifically to recruitment and selection:*

Recruitment

Employers and/or funders should establish recruitment procedures which are open, efficient, transparent, supportive and internationally comparable, as well as tailored to the type of positions advertised.

Advertisements should give a broad description of knowledge and competencies required, and should not be so specialised as to discourage suitable applicants. Employers should include a description of the working conditions and entitlements, including career development prospects. Moreover, the time allowed between the advertisement of the vacancy or the call for applications and the deadline for reply should be realistic.

Selection

Selection committees should bring together diverse expertise and competences and should have an adequate gender balance and, where appropriate and feasible, include members from different sectors (academic and non-academic), and disciplines, including from other countries and with relevant experience to assess the candidate. Whenever possible, a wide range of selection practices should be used, such as external expert assessment and face-to-face interviews. Members of selection panels should be adequately trained.

Required sub-headings:

- Demonstrate the transparency of the selection process of the researchers
  - ✓ Dissemination of the calls in appropriate ways;

- Start with a statement reminding the evaluator about the layout of the COFUND (how many researchers will be recruited, how many calls there will be over the duration of the Programme and, if known, where the recruiting organisations are).
- In the case of Postdoctoral Programmes, two options for the calls: one single call or several calls, with regular selection rounds following fixed deadlines (not more than 4/year).
- Clearly state the start and end dates of the dissemination and outreach activities for the calls and calls' results.
- If applicable, state whether a Programme Manager (PM) will be appointed (full-time/part-time) upon signing the Grant Agreement.
- If appointed, describe how the PM will set up a PR, dissemination and public outreach strategy for the promotion of the Programme and its calls. Comment on the PMs role in monitoring the calls and adapting PR strategy where necessary.
- State the start month and the end month of these activities.

- Describe the Dissemination Strategy
- If available, mention the Programme logo. Describe that the Programme logo & MSCA logo will be used on all dissemination material for the call.
- Mention the internal support/staff involved in the process. Describe the central services / offices / expertise of the beneficiary and partner organisations that will be made available to the Programme e.g., Research Office, Communications Office, Marketing, International Affairs and the experience they already have in H2020/HE or MSCA.
- Describe the target group of the Programme and that the PR strategy will be tailored to them.
- Include a definition of the experience necessary (PhD for postdocs or non-PhD for doctoral candidates) and any mobility requirements (as per MSCA).
- Describe the dissemination activities that will be used to attract geographically diverse applications, international/Europe-wide, and under-represented groups (e.g., women). Make sure to provide specific details on any targets being set and show how they will be reached:
    - Programme website – this is a key resource for highlighting the details of the Programme.
    - Programme launch event – where will this take place, what key audiences will be invited, what material will be developed?
    - Other websites – list all the websites where the information of the calls will be detailed (beneficiary organisations, partner organisations, etc.).
    - Programme social media - will the Programme have a Twitter, LinkedIn account, etc.?
    - Other social media - list the followers of the beneficiary organisation, implementing partners/associated partners, national MSCA NCPs official social media.
    - Promotion via networks of people and organisations involved (EU projects with large consortiums, etc.).
    - Name relevant conferences, exhibitions, professional networks, journals (scientific, industry) where calls could be advertised.
    - Job advertisement websites.
    - Use of the EURAXESS website (mandatory).
    - Include how you will take into account (and promote) gender balance, researchers at risk and other diversity aspects when advertising. Try to go beyond a single statement that applications from males and females will be encouraged.

        ✓ Information provided to the candidates (e.g., conditions of the fellowship, host institution, evaluation process, results, review/appeal, etc.);

Consider elements such as:

- Information on the background to your COFUND Programme.
- Briefing sessions/webinars, helpdesk, and frequently asked questions.
- Guide to the application procedure. Recommendation is to use online (safe and secure) application procedure.
- Information on the host organisations and potential supervisors.
- Information on the conditions of the fellowship. State that all relevant information (application requirements, eligibility and mobility requirements, specific conditions for the fellowship, working conditions, minimum gross salary, host institution, evaluation and selection process, etc.) will be available on the Programme website, together with (downloadable) application materials. Make reference to concrete documents: FAQs, guide for applicants, promotional material, etc.
- Application support in case of queries – PM (and possibly part of the host's operations team) through dedicated email address – technical support for application.

- Feedback provided to applicants during the entire programme lifecycle: at application, evaluation, recruitment, onboarding and implementation stage.
- Redress procedure.
- Support provided to incoming researchers (visas and migration, relocation support, etc.).
- Include details on how the applicants' personal data will be handled, i.e., GDPR or privacy statement.
- Don't forget to mention where the information will be published.

✓ Eligibility criteria and application requirements;

- Provide a short introductory paragraph outlining aspects for the fellowships/doctoral programmes' positions, i.e., number of fellowships or doctoral positions, number of calls, types of fellowships and their duration.
- For **Doctoral Programmes** state if the offered position (recruitment) corresponds to the typical time needed to complete a PhD in the host institution's country. Explain how you will cover any duration beyond the scope of your COFUND grant.
- For **Postdoctoral Programmes** you can use the example of MSCA Postdoctoral Fellowships as a model but you don't have to limit your programme to the researchers within the 8 years of research experience. You can open and tailor your COFUND according to your strategies (for example you can have just incoming or outgoing researchers, researchers with a career break, hosting in non-academic sector, etc.)

- Provide paragraphs on the following:
- **Eligibility of applicants** - Outline the information that will be provided to applicants regarding their research and mobility requirements including, but not limited to the following:

	Doctoral Programmes	**Postdoctoral Programmes**
Research Experience (see MSCA Work Programme 2021 – 2022., section 4.3.2.)	Applicants must, at the deadline of the co-funded Programme's call, be doctoral candidates – i.e., not already in possession of a doctoral degree.	Applicants must, at the deadline of the co-funded Programme's call, be in possession of a doctoral degree.
Mobility requirements (see MSCA Work Programme 2021 – 2022., section 4.3.2.)	Must not have resided or carried out their main activity (work, studies, etc.) in the country of the recruiting beneficiary or implementing partner for more than 12 months in the 36 months immediately before the deadline of the co-funded Programme's call.	
Application requirements	Doctoral candidate will be allowed either to propose their own project (often within certain research areas) or to choose among research areas (ideally, broadly defined) proposed to them.	State that applications must be based on "individual-driven mobility", which means that the applicants will be able to freely choose a research topic and the appropriate host organisation and supervisor fitting their individual needs. The supervisor should not be involved in the preparation or validation of the proposal.

		Have in mind relevant ethical requirements in the applications (e.g., **an ethics self-assessment section** in the application form).
Eligibility of supervisors	Describe aspects of supervisor training that will enhance the quality of supervision of recruited researchers. Use this section to briefly address the progress monitoring and development of a career development plan for the recruited researchers.	
Secondments requirements	State that applicants (doctoral candidates and postdocs) are encouraged to also include elements of international, cross-sectoral and interdisciplinarity mobility in their fellowships such as intersectoral and/or interdisciplinary secondments and short visits. If possible, state where and when the researchers will go on secondment, include secondment duration (e.g., maximum of one third of the recruitment contract duration).	

- ✓ Gender dimension and other diversity aspects: Describe how the gender dimension and other diversity aspects are taken into account in the project's selection and recruitment process. If you do not consider such a gender dimension to be relevant in the case of your project, please provide a justification.

- Refer to your institution's gender equality plan here including its objectives and any actions that will be taken as part of the plan.
- If the research area is taken up by mainly one gender, then how will the Programme ensure to attract more of a gender balance in the pool of candidates (call advertisement, gender balanced committees, etc.). Describe how a gender-balanced postdoctoral cohort might have a long-term transformative power in this regard.
- For **Doctoral Programmes** – if applicable and relevant to your research area, describe how you will recruit a gender-balanced mix of doctoral candidates, e.g., targeted advertising to women-in-science groups (e.g., IEEE Women in Engineering, plus multi-disciplinary groups such as the European Platform of Women Scientists).
- Describe how you will ensure that there is gender balance in expert reviewers and the selection committees.
- Beside gender dimension, think about other diversity aspects.
- Will you provide any support for candidates with disabilities during the recruitment process? Don't forget about the Special Needs Allowances in MSCA projects which may apply for any of your recruited researchers at the time of implementation of the programme.
- Are there any provisions for targeting/reaching researchers at risk?

- *Remember that that this question relates to the content of the planned research training Programme, and not to gender balance in the teams in charge of carrying out the project.*
  - This is not applicable for 1.1 section. As stated before, relevant gender dimension and other diversity aspects are taken into account in the **project's selection and recruitment process**.

- *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*

- *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 https://ec.europa.eu/info/news/gendered-innovations-2-2020-nov-24_en*

  ✓ Any other relevant point.

- Describe the organisation of the selection process
  ✓ Composition of committees involved in the different stages of the process (i.e. eligibility check, evaluation, selection, appeal);

➢ Begin with a reference to the **Charter and Code** for the recruitment and selection of researchers.
➢ Include a figure about the selection workflow and the committees involved. The timeline must be concrete.
➢ Describe the composition of the committees involved in each stage of selection (not just the review panels):
- **Eligibility check** – PM (if appointed) with Programme Coordinator (PC).
- **Ethics committee** – for example, the host's Research Ethics Committee. For Doctoral Programmes, if doctoral candidates are asked to present their own research project, at this stage they should go through some form of ethics review.
- **External international peer-review panel / assessment of the application materials**: How will a list of international peer reviewers be obtained/compiled? How many experts per proposal? And how many of those are outside the partnership in the case of doctoral and international (based in other countries) in the case of postdoctoral? Are they gender balanced?

Evaluation and selection aspects	**Doctoral Programmes**	**Postdoctoral Programmes**
MSCA COFUND Guide for Applicants 2022	**Independent evaluators**, from outside the partnership, with no conflict of interest, must be involved at all stages of the evaluation process in the evaluation of each submitted application. The **Selection committees** in charge of selecting the doctoral candidates must	There must be substantial involvement at each submitted application and at all stages of the evaluation process, of **independent evaluators based in other countries**, with no conflict of interest. Selection of the postdoctoral candidates will be done by the **Selection committees**, whose members include international

	include independent experts from outside partnership. The members must have an adequate **gender balance** and **relevant expertise and experience** to assess the candidates. A good balance between experts related to the beneficiary and **independent experts from outside the partnership** must be ensured in the pool of evaluators and in the selection committees.	independent experts from outside partnership, moreover, the members must also have an adequate **gender balance** and possess the **relevant expertise and experience** to assess the candidates. A good balance between experts related to the beneficiary and **independent international experts from outside the partnership** (based in other countries) must be ensured in the pool of evaluators and in the selection committees.

- **Establish Ranking**- consensus meeting (remote where necessary via teleconference), mention who will chair it, and measures for dealing with extreme differences in scores. Explain how similar ranked proposals will be decided upon.
- **Interview Panel** – Describe the interview panel: It should be gender- balanced, with minimum three interviewers (plus a HR representative), and include some external members. Describe how the panel members will have unconscious bias training.
- **Funding Decision**: who will make the final funding decision? Refer to the role of the Steering Committee.
- **Redress Committee:** describe how redress works for applicants.
- **Feedback to applicants**: what will be provided and by whom (via the Programme Manager and Human Resources).

✓ Selection of experts;

- Say that experts will be selected in compliance with the principles included in the European Code of Conduct for the Recruitment of Researchers.
- Criteria for the selection and balance of experts: include expertise as evidenced by research outputs, geographic and gender balance, reviewing experience, experts based in the non-academic sector, involvement in policy, management experience etc. Ideally, experts should be based outside the country of beneficiary and/or hosting partners.
- The composition of selection committees must be clear and efficient, with significant international participation, include external experts with relevant expertise. It must also be balanced: academy, industry, members per scientific domain.

- **Expert appointment**: Will they sign any contract/declaration of commitment? Will they be compensated?
- If training or guidance will be provided for the reviewers, describe that here.
- Explain the **rules for conflict of interest**. You can get ideas from the **Horizon Europe rules.**
- Foresee a training/briefing for experts.

✓ Researchers/Researchers' selection workflow and powers entrusted to the different actors;

- Provide detailed information on:
  - The stages of the selection workflow and the details about the decision process.
  - The responsible person/committee at each stage of the selection process.

- Describe how long each stage would take (and the duration of the whole recruitment process – including provisions for possible redress requests).
- Consider providing a graphic representation of the process (such as the recruitment timeline).

✓ Any other relevant point.

- List the Evaluation Criteria
  - ✓ Criteria/sub-criteria for the selection of researchers;

➢ Outline the evaluation criteria that will be used by the evaluators to score the proposal.
➢ Take a look at the criteria for the MSCA Postdoctoral Fellowships (Excellence, Impact, Implementation), and adjust them as needed. They are outlined in **MSCA Work Programme 2021 – 2022.**
➢ Include a table outlining the evaluation criteria that will be used by the evaluators to score the proposal. Show that these criteria (and the corresponding scoring system) will ensure objective and internally consistent selection procedures.
➢ Address the evaluation criteria at both remote review and interview stage.
➢ Describe the interview thematic areas and evaluation criteria.

✓ Any other relevant point (scoring, thresholds, etc.).

Scoring: Keep it simple and easy for the reviewer to understand! If you ask for a CV and a motivation letter (or anything similar), make sure to have an adequate scoring system for each application document.
Alternatively, if the beneficiary has its own evaluation system/criteria already in place you can use this (or merge it with additional selection procedures, aimed at ensuring a fair, transparent, competitive, and independent process).
Threshold: Include a table showing the threshold, weightings and ex-aequo priority order. Those for MSCA could be adopted.

- Refer to any overall threshold which must be met to be placed on the ranked list. State the minimum score to be admitted to the Interview stage (regardless of the number of candidates). Make reference again to the consensus meeting of reviewers (may be remote).
- How many individuals will be called for interview from the list? (For example, 3 times the number of the positions on offer?)
- Outline the structure of the interview: in English, oral presentation, question and answers session? Try to select a format that ensures the objectivity of the interview process.
- How will the final mark for the applicant be calculated?
- Specify the mechanism to deal with equal scores, and a mechanism to deal with strongly different individual expert scores in a remote evaluation.
- Bear in mind that an applicant could score very highly in a written application but may perform very weakly at interview. Consider having a minimum threshold for each selection stage (so as to avoid recruiting underqualified applicants, even in the case of a low number of applications).

- Ensure equal opportunities

➢ Equal opportunities should be understood in its widest sense. While it is not possible for an applicant to describe fully its potential actions, its equal opportunity policies and those of its partner

organisations should be summarised. The independent experts will be asked to scrutinise how these provide equality of opportunity to the researchers, equality of treatment during the selection process and equality of support, during their fellowships, to the successful researchers.

- Refer to any equal opportunities policies within your organisation, and the implementing partners (if relevant). Is there already any ongoing provision that all staff members can benefit from? Do these include anti-discrimination measures?

Provide information on how researchers with disabilities are supported by the Programme (including during the application and selection process). The MSCA Special Needs Allowance provides financial support for the additional costs entailed recruiting researchers with disabilities (see page 100-101 of **MSCA Work Programme (2021-2022**).

- International opportunities – explain that the Programme will be open to any experienced researcher around the world and that the mobility rule previously described will be adhered to.
- Career Restart policy – does your Programme offer the opportunity for experienced/postdoc researchers who took a career break to return to research?

Refer to support for 'researchers at risk', i.e., researchers holding refugee status. The European Commission have also recently launched the initiative **Science4Refugees** to help refugee scientists and researchers find suitable jobs that both improve their own situation and put their skills and experience to good use in Europe's research system. For more information, feel free to consult **the Guidelines for Inclusion of Researchers at Risk**

- Appointment conditions of researchers

- Amounts that will be provided for the benefit of the researcher (e.g., living, mobility, travel and family allowances) and for the organisation that is hosting the researcher (contribution to research, training and networking costs, indirect costs) (Table 1.1a)
- Discuss the amounts for the following cost categories and why they are appropriate for your COFUND Programme. Make sure to provide an estimation and justification of the budget that would be needed. Provide additional details on the amounts listed in table 1.1a. Evaluators need to see that the costs indicated in the budget table make sense.
- Illustrate the amounts provided for the benefit of the researcher:
  - Living allowance (show that the salary is attractive and competitive at national level(s))
  - Mobility allowance
  - Family allowance – what is this based on (e.g., 75% of researchers might be estimated eligible for the family allowance[3]). At what stage will the eligibility for the family allowance be determined (i.e., at the call deadline or at the time of recruitment?)? In case the family status of the researcher changes at any point during the fellowship, it is recommended to revise and include family allowance.
  - Describe the national statutory deductions and give an indication of the minimum gross salary which would be provided to the researcher.

- Amounts for the benefit of the host organisation(s):

[3] This is the estimation for the Doctoral Networks projects and it can be useful for the COFUND project proposals as well. More information is on page 80 in Model Grant Agreement https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/agr-contr/unit-mga_he_en.pdf

- Research training and networking: State that this portion of budget will cover expenses such as consumables, research costs, equipment costs (e.g., laptops) travel for training/events etc., training costs, Programme workshops, conferences, etc.
- Explain how the secondment expenses will be covered.
- Management and indirect costs: state these costs can be used for the PM salary (if appointed), peer review costs, website, advertising, call dissemination costs, etc.

✓ Working conditions, institutional administrative support, and available services/facilities;

Suggested points to cover:

- Describe how the researchers will have excellent working conditions.
- Human resources (mention the HR Excellence in Research Logo, if you have it).
- EURAXESS and the migration support for non-EU researchers.
- Support from COFUND management.
- Using a table outline all the support services / facilities in all the organisation locations.
- Any dedicated support for researchers with families and for researchers with special needs.

✓ Employment conditions, including statutory working practices, social security coverage and social benefits;

- Highlight that, as staff members, doctoral candidates/postdocs will be subject to relevant employment laws, e.g., equal status act, employment equality acts, disability act, etc.
- Describe the contracts that will be provided to doctoral researchers (they should be employed as staff unless explicitly prohibited by the national legislation (in that exceptional case a fixed-amount fellowship can be used)[4].
- Describe statutory working practices, social security coverage and social benefits (sick leave, maternity/paternity and parental leave).

✓ Compare the proposed working conditions through the Programme with the regional and/or national and/or sectoral ones;
✓ Any other relevant point.

- Describe how these working conditions compare with the standard treatment of doctoral candidates/postdocs in your country. Are they treated as staff or students? Remember that the conditions offered by COFUND should not be worse than the average national conditions (ideally, they should be better).

Table 1.1 a: Amounts provided to researchers and hosting organisations[5]

[4] For more details regarding the two ways of recruiting researchers, check the **MSCA Work programme** on page 101.

[5] The EU contribution can be used to support any cost items of the programme (remuneration costs, mobility costs, family costs, research, training and networking costs, management and indirect costs). Individual cost items may be fully or partially funded through other resources including EU programmes other than Horizon 2020 or Horizon Europe, such as the Cohesion policy funds, provided that double-funding is avoided. Applicants must specify in their proposal the total cost of their proposed programme and in particular the amounts that will be provided for the benefit of the researchers and for the organisation(s) that will implement the programme. This information will be needed to evaluate the adequateness of employment and working conditions of the researchers.

The following table (or similar) should be used to detail the financial aspects of the Programme. Please note that the amounts for the living allowance and for the mobility allowance must be specified individually**:**

Cost categories	**EU contribution** **(EUR/person-month)**	**Total cost = EU contribution + own resources** **(EUR/person-month)**
COFUND allowance	**2 800 (for Doctoral)*** **3 980 (for Postdoctoral)***	***
Mobility allowance**	**N/A**	***
Family allowance**	**N/A**	
Travel allowance**	**N/A**	
Research costs**	**N/A**	
Other (training, etc.) **	**N/A**	
Management costs **	**N/A**	
Indirect costs**	**N/A**	
Number of researchers		
Number of fellow months		
Total amount		

**Choose the applicable rate, and delete the other.*

*** If applicable, delete otherwise. Other lines can be included for categories not shown in the template above.*

*** The monthly gross remuneration, i.e., salaries, social security contributions, taxes and other costs or compulsory deductions under national legislation linked to in the remuneration, and the mobility costs for the benefit of the researchers must be: *not lower than EUR 2800 for Doctoral researchers and not lower than EUR 3980 for Postdoctoral researchers***.**

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The PhD Calls will be appropriately advertised through several means including a programme-specific website, social media exploitation, email campaigns targeting relevant networks and specifically organised launching events.* 2. *The information provided to applicants are clearly specified and complete, including conditions of the fellowship and helpdesk accessible during the whole process.* 3. *The evaluation criteria are clear and well-structured, with a standardised approach and quality measures in place right from the beginning. The internationality of the evaluators is guaranteed.* 4. *The proposal provides a full and convincing description of selection/recruitment processes for the researchers, assuring transparency, equal opportunities and gender aspect considerations in the*

recruitment process. Information to be provided to candidates is comprehensive and of good quality.

5. *The composition and organisation of selection committees is overall excellent and guarantees the fairness of the selection procedure, e.g., will involve a minimum of three independent external international experts.*
6. *The proposal clearly demonstrates that equal opportunities and gender mainstreaming are very well considered in all phases of the project. It is valuable that a strong emphasis is placed on attracting female, at-risk and widening-country researchers.*
7. *Gender dimensions and other diversity aspects are well addressed. Gender balance is well-considered in the composition of all committees. Special training will be provided to the members of the committees addressing fairness, equal opportunities, ethnicity and gender issues.*
8. *The selection of experts is well planned with a detailed process and information on Conflict of Interest, Code of Conducts, confidentiality, and fair and unbiased evaluation envisaged.*
9. *The composition and organisation of selection committees are clear. The international aspect in all relevant stages of the selection process is properly in place. Ex- aequo and redress procedures are well considered in the selection process.*
10. *The recruitment process is very well defined. The eligibility criteria and application requirements are transparent. Selection criteria are appropriately based on the OTM-R recommendations and are clearly articulated in the proposal with a relevant and defined scoring system.*
11. *The recruitment and selection process will be appropriately in accordance with the European Charter & Code for Researchers principles.*
12. *The working and appointment conditions are appropriate, competitive and attractive. The envisaged salary level is above national standards.*

WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS

1. *The programme will use some standard conventional channels for the dissemination of the call, not showing how to reach specialised communities, insufficiently considering the national and international levels, the social media and the partners' dissemination capacity.*
2. *It is not entirely clear that all foreseen evaluation criteria are adequate to ensure recruitments of the desired quality, for example (i) threshold aspects, (ii) resolving ex aequo cases, (iiii) weighting of intersect orality in project proposal, (iv) exemptions from minimum publication requirements.*
3. *The exception from the mobility rule is not in line with the COFUND-rules and it is not convincingly argued how many fellows might be recruited under these conditions.*
4. *The necessity for applicants to contact a supervisor for a specific research project introduces a potential risk for a preselection, which limits the fairness of the evaluation.*
5. *It is not evident that the interview panel contains fully independent and international experts in suitable number.*
6. *Researchers at risk are not clearly taken into account in the selection procedure. Moreover, the proposal insufficiently addresses whether special support for those with disabilities will be available during fellowships.*
7. *Although clear criteria for the selection of external experts for the Selection Committee is included, the proposal lacks sufficient specificity as to how they will be recruited, e.g. how they will be identified.*
8. *There is insufficient detail on appointment conditions for comparatively evaluating the attractiveness of the working conditions in the hosting countries.*

1.2 Quality and novelty of the research options offered by the Programme in terms of science, interdisciplinarity, inter-sectorality and level of transnational mobility. Quality of open science practices.

Required sub-headings:

- Describe the research options offer by the Programme
  - ❖ Excellence of the research Programme;

- Highlight the excellence of the research team.
- Where possible, describe the novelty in the research programme.
- Provide a paragraph outlining the strengths of the host organisation(s) and/or regional/national research and innovation ecosystem.
- If the beneficiary is a funding organisation, you could refer to the research and innovation regional ecosystem to show that your regional/national context is particularly suitable to the development of your doctoral candidates/postdoctoral researchers' cohort(s).
- Name possible supervisors, if known in advance.
- Provide information on secondment options. Refer to section where the intersectoral aspects of the project are described.
- Finish the section with a very short paragraph mentioning training and career development (linking to section 1.3.2).

- **For Doctoral Programmes** - Describe the institution(s) awarding the PhD to the applicants, making clear the link between existing expertise and the COFUND's research area. Also, a table could be used to outline the PhD research areas/topics and naming possible supervisors. While it is ok to have a pre-determined set of research topics, successful applicants should have some input in defining the final doctoral project. Ideally, the number of possible research topics should be greater than the number of doctoral positions (so to maximise candidates' freedom of choice). A wide number of topics will allow freedom of choice.
- Mention existing training Programmes, and how they could fit into the COFUND DP.

- For **Postdoctoral Programmes** - Describe how the Programme underpins the principle of individual-driven research. If applicable, outline the research areas and relate them to the host entity's strengths and/or to the national or regional strengths. If applicable, reference also how the research areas relate to the RIS3 initiatives.

- Candidates must be fully free to define their projects, in line with proposed research areas.

  - ❖ Quality of the research options in terms of interdisciplinary research options, inter-sectorality (mobility between the academic and non-academic sector) and international networking;

Break this section down into three headings:

Interdisciplinarity exposure:

- Focus here on the interdisciplinary nature of the Programme and of the organisation/institution/department/centre. For example, mention already-existing multidisciplinary projects and research areas.
- Outline how doctoral candidates/postdocs will engage with different disciplinary areas. Multi-disciplinarity of projects? Training elements? Multi-disciplinary supervisory panel?

- Describe how doctoral candidates/ postdocs will receive training in advanced research skills beyond their own discipline (for instance, during network-wide events).
- Propose shared courses or projects to the doctoral candidates from different disciplines, in order to foster interdisciplinary synergies.
- Consider creating multi-disciplinary projects involving different research teams from the same or from different institutions.
- Offer possibilities for laboratory rotations as a part of secondments (minimum of 2 weeks) or short visits (few days).

Inter-sectoral exposure:

- Explain the secondments and involvement of the non-academic sector.
- Provide a list of all the non-academic organisations, known at proposal stage, specifying their role (training, secondment hosts, etc.)
- Mention training in non-academic specific transferable skills as part of the formal training Programme (link here to section 1.3 where this training should be described). For example, inviting experts working in industry or other organisations from the non-academic sector to deliver courses on entrepreneurship, exploitation of research results, open science, ethics, patenting, etc., to the recruited researchers.
- Mention industry networking events relevant to doctoral candidates/postdocs. Will supervisors/industry partners help them to make the most of these opportunities? Emphasise the concrete opportunity to develop long-lasting high-profile networks.
- For **Doctoral Programmes** - if known at the time of proposal writing, mention some forms of cooperation with other doctoral programmes.
- Refer to occasions for exposing doctoral candidates to various socio-economic actors gathered in a single campus or hub.

International mobility:

- Reference to mobility requirements for applicants applying to the COFUND Programme.
- Explain if there are possible international secondment hosts, short visits and opportunities for international networking and collaborations.

- 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 the research training Programme, in a way that will increase the chances of the project delivering on its objectives. If you believe that none of these practices are 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 could mention the Open Science policy of the Programme here and that the doctoral candidates/postdocs will receive training in Open Science.
- Provide information on how the funded projects within your COFUND Programme will comply with the mandatory, and when relevant, recommended open science practices – at beneficiary and implementing /associated partners' levels. Ideally, your open science strategy should not be limited to open access and open data, but deal with the full spectrum of Open Science practices.

Mandatory OS practice
✓ open access to scientific publications under the conditions required by the Grant Agreement; ✓ responsible management of research data in line with the FAIR principles of 'findability', 'accessibility', 'interoperability' and 'reusability', ✓ information about the research outputs/tools/instruments needed to validate the conclusions of scientific publications or to validate/re-use research data; ✓ digital or physical access to the results needed to validate the conclusions of scientific publications, unless exceptions apply; ✓ 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.

Recommended OS practice
✓ 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).

- Describe how the COFUND will ensure that the relevant OS practices will be implemented in the researchers' projects as an integral part of the proposed methodology, therefore increasing the chances of the project delivering on its objectives.

Addressing OS practices, take into account:

- **Early and open sharing**: such as preprints or preregistration/registration reports, and which platforms are going to be used (if known at the time of proposal writing – especially for Doctoral Programmes).
- **Reproducibility of research outputs**: such as transparent research design, the robustness of statistical analyses, addressing negative results, 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 the OA requirements are going to be met (OA to data through a trusted repository, and under open licenses). If already known (specially for the Doctoral Programmes) 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.
- **Open peer review**: if possible, provide specific information regarding the publishing locations that are going to be used 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 the projects, 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).

➢ 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

➢ Research data management (RDM) is the process within the research lifecycle that includes the data collection or acquisition, organisation, curation, storage, (long-term) preservation, security, quality assurance, allocation of persistent identifiers (PIDs), provision of metadata in line with disciplinary requirements, licensing, and rules and procedures for sharing of data.

➢ 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.

Applicants generating/collecting data and/or other research outputs (except for publications) during the project must provide maximum 1 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):

➢ 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.

➢ Describe how the COFUND will ensure that the data is managed in line with each of the FAIR principles.

- Aim to show best practice in RDM – including what provisions are required to be in place to ensure that data is managed responsibly (e.g., the right venue is chosen for deposition, legal provisions such as general data protection regulation (GDPR) are respected, etc.).

  - *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 (chapter 16). *of the HE Programme Guide on the Funding & Tenders Portal.*

- ✓ Any other relevant point.

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The doctoral candidates have sufficient freedom to choose the area they want to address and have the opportunity to choose one or more projects among those advertised.* 2. *The programme offers high quality multi-disciplinary research options which represents global challenges in line with sustainable development goals and with key Horizon Europe strategic priorities.* 3. *The research options offered by the programme in terms of science is convincingly wide and of high quality. The research programme offers excellent research opportunities and the process defines for the researcher's freedom to draft their research projects in the given research area. The interdisciplinary, cross-sectoral and international approach of the proposal is very promising and well-integrated with the Implementing and Associated Partners.* 4. *The inter-sectoral and international dimensions of the research options are convincing, being ensured through the already established network of inter-sectoral and international partners interacting via secondments, training and mentorship. An additional strength of the programme is the provision of multiple industry secondments per project, including one with the local health industry cluster, hence enabling interaction of doctoral candidates with various local and international industries.* 5. *The supervision arrangement is excellent, including a supervisory team with interdisciplinary supervisors that also includes one from the fellow's secondment host. This arrangement is strengthened by the allocation of a named supervisor with a strong track record of scientific and supervision accomplishments to each doctoral candidate.* 6. *The Triple-I dimension of the programme is strong. The project is implemented in interdisciplinary research institutes, the researchers will have a mandatory secondment to industry and to international academic and non-academic organizations.* 7. *Open science practices and FAIR principles are well explained and appropriately implemented. Research data management and management of research outputs are very good and present at both the central and individual project levels. The use of Data Management Plans (DMPs) is appropriate.* 8. *Open science practices are encouraged including open access publications and open access to research data. Dedicated funding is also foreseen to facilitate open access publishing.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The freedom of choice for the research topic and host institutions is not sound enough. Each fellow is assigned to a pre-determined mentor/supervisor, which limits the required free selection of supervision.* 2. *Some of the research projects are given in the language of the host organisation. There is a risk for reduced freedom of choice for applicants that do not speak the host organisation language.* 3. *The freedom of the candidates to draft their research projects is questioned by the mandatory involvement of the hosting group in designing the research plan.*

4. *A general description of the research interests of the consortium is given, however the quality of the research that will be offered to the applicants in terms of scientific content of the single PhD project and the associated hands-on training is only vaguely described.* 5. *The plans regarding international mobility and potential cross-sectoral mobility are rather broadly outlined and the specific kind of support offered is not precisely detailed.* 6. *The programme addresses the intersectoral dimension only through secondment periods that are both optional and short. The short duration of the intersectoral secondment limits its benefit for the fellow and for the hosting company.* 7. *Secondment and short visit possibilities at the partner organisations are not sufficiently defined.* 8.

1.3 Quality, novelty and pertinence of the research training Programme (including transferable skills, inter/multidisciplinary, inter-sectoral and gender as well as other diversity aspects)

Required sub-headings:

- Overview and content structure of the doctoral or postdoctoral training Programme, including network-wide training events and complementarity with those Programmes offered locally at the participating organisations. (please include table 1.3a)

- Begin with an overview of the main objectives of your COFUND training Programme.
- Who will coordinate the training Programme? Role of the project management team / supervisory board or in the case of a larger COFUND Programme a specific research career development manager? Describe quality monitoring procedures for trainings and how the trainings will be evaluated by the researchers.
- Describe how the training Programme has been designed to meet the research & transferable skills' needs of these researchers and the needs of the sector and to enable the rapid ascent of researchers to key leadership positions in the field. Specify, how the researchers' training needs will be identified.
- Describe how the Career Development Plan (CDP)[6] will be established.
- Include a figure/table here as an overview of the research skills training (core and advanced) which the researchers will receive. Use graphics to highlight several research training areas.
- Include the following elements in the training plan:
  - Scientific and transferable skills through hands on training activities. What skills will the researchers learn and develop from carrying out their individual research project? How will they be monitored and supported in this process? Refer to the role of the supervisory panel. What is the added value of having more than one supervisor?
  - Describe how your training elements will build upon existing Programmes already running in your host institution(s) (e.g., other MSCA/H2020 projects, career development modules.). List existing relevant modules (and possibly trainers and timing) in a table.
  - Intersectoral or interdisciplinary transfer of knowledge (through secondments and short visits). Mention the non-academic partners' contribution to the training.
  - Summer schools/workshops which will include specific courses on research and transferable skills- give an overview of your COFUND summer schools – include details of morning & afternoon sessions over a couple of days.
  - Specific for **Doctoral Programmes** – if possible, specify how many ECTS credits will be assigned for each activity. Outline any requirements of the doctoral candidates in this area

[6] Remember that in addition to research objectives, this Plan comprises the researcher's training and career needs, including training on transferable skills, teaching, planning for publications and participation in conferences and events aimed at opening science and research to citizens.

– how many modules must they complete/credits etc. These provisions should be in line with the host institution's regulation (and, where applicable, to national law).

- Supervised inter-disciplinary research project -provide a table summarising the discipline-specific research training provided by each supervisor – include name, supervisor responsible and training site. Openly refer to 'training through research', specifying that the doctoral candidates/postdocs will receive appropriate support in their research activities.

- Describe in more detail the key transferable skills training that the researchers will receive.
- Outline any requirements of the doctoral candidates/postdocs in this area – how many modules must they complete etc. (minimum target)
- State that doctoral candidates/postdocs will receive transferable skills in key areas including, but not limited to, the following:
  - Grant writing
  - Project management
  - Intellectual Property Rights (IPR) management
  - Entrepreneurship skills
  - Training for job interviews
  - CV writing
  - Open science skills (i.e., researchers should learn how to open access their publications, manage and implementation of FAIR data management)
  - Public engagement & communication skills
  - Research integrity
  - Gender aspects
  - Citizen science skills

- Indicate the local and the network wide training activities, and show the balance between them (the aim is to demonstrate that there is complementarity between local and network-wide training):

LOCAL TRAINING	• Offered at the main beneficiary/implementing partner where the fellow will work. Include a description of the structured training (research training) offered, for example, local graduate/doctorate schools, courses for postdoctoral researchers. • Describe other specific opportunities and trainings offered at the University where the researcher is employed (e.g., ethics, research integrity, gender, open science) and transferable skills training.
NETWORK WIDE TRAINING	• Offered by the implementing/associated partners at specific events, e.g., workshops, summer schools, training weeks, training during the secondments. • Be very specific about the details for each course/school/workshop - when and where it will take place, what areas will be covered, how long will it last, who will deliver the training. You can include extra tables to show a fuller description of all the trainings.

- Role of non-academic sector in the training Programme (if applicable)
  - ❖ Training on research skills within the appropriate discipline(s) and/or to gain new skills;
  - ❖ Support and/or additional training in non-research oriented transferable skills (i.e. grant writing, project management, IPR, entrepreneurship, training for job interviews)

- ➢ Provide precise details of the contribution of the non-academic beneficiaries and implementing/ associated partners in the training programme, including recruiting (for non-academic beneficiaries), training (local and the network wide training), and hosting secondments (specific training).
- ➢ Besides industry, non-academic partners can be an NGO, a charity organisation, a hospital, or any other organisation that satisfies the definition of non-academic sector.
- ➢ It can be very helpful to use a table to list the role of each non-academic participant – this makes the details clear and easy to follow.

Table 1.3 a Main Network-Wide Training Events, Conferences and Contribution of the Beneficiary/ Partners

	Main Training Events & Conferences	ECTS[7] (*if any*)	Lead Institution	Action Month (*estimated*)
1				
2				
3				
4				

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS

1. *The research training program is comprehensive, novel, and high-quality, including a suitable focus on open science, research dissemination, and transferable skills.*
2. *The career development modules are well elaborated. There is a well-balanced set up of highly relevant research training, inter/multidisciplinary and inter-sectoral educational development, and innovative transferable skills training through collaboration with partner universities.*
3. *The training opportunities are very well structured. They are appropriately planned, both for the research training aspect, including scientific skills, interdisciplinary and inter-sectoral training, and for the transferable skills aspect (including training on ethics, gender issues, leadership, entrepreneurship, technology transfer, scientific communication, and grant writing). The training programme is also well supported by a diverse set of seminars, annual retreats, in-house courses, distinguished lecture events.*
4. *Transferable skills training is well thought out, with a mandatory course in Open Science and Open Access and several elective courses, including on leadership and on gender and diversity. The specific focus on innovation, commercialisation and technology transfer is credible and in line with the aims of the programme.*
5. *International mobility is sufficiently addressed, through international networking opportunities and mandatory international exposure at conferences and events.*
6. *An innovative aspect is that the quality of training activities is assessed and ensured through an evaluation procedure by the doctoral candidates after every training activity.*

[7] ECTS: European Credit Transfer and Accumulation System. http://ec.europa.eu/education/ects/users-guide/docs/ects-users-guide_en.pdf.

WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The time/effort that the PhD fellows will be required to dedicate to the training courses is not fully convincing.* 2. *The expected balance between compulsory and optional training activities is not entirely clear in the proposal.* 3. *While the list of training activities is very generous and comprehensive, the details about the learning path for the fellows are not sufficiently presented.* 4. *The role of non-academic sector in the training programme is not explained in sufficient detail. Specific training offered by those partners is not clearly specified and it is not fully clear if it targets all the projects and candidates.* 5. *Aspects such as gender and diversity dimensions in research are not sufficiently considered in the training programme.* 6. *The proposal fails to convincingly explain how the international networking and mobility opportunities will be channelled in practical terms.*

1.4 Quality, novelty and pertinence of the supervision, career guidance and career development arrangements

Required sub-headings:

- Describe the supervision arrangements
  - ✓ Qualifications and supervision experience of supervisors: quality and experience of supervisors should be described (especially for Doctoral Programmes), as well as how progress of the researchers will be monitored and their career development promoted and guided throughout the duration of the fellowship

Supervision arrangements

- Describe the number of supervisors required per applicant i.e. each fellow should have 2-3 supervisors:1 primary supervisor at the host, 1 co-supervisor and 1 non-academic supervisor based in the secondment organisation. What efforts will be made to achieve gender balance among the supervisory panels for each researcher?
- Include when the supervisor will be identified by the applicant (during the application process? Before submitting the application?). The same goes for the co-supervisors and the non-academic supervisors.
- Remember, the supervisor should not be involved in the preparation of the proposal, as it might be perceived to hinder the principle of 'individual-driven' research (especially for the Postdoctoral Programmes).
- Explore possibilities for international/intersectoral co-supervision. Mention synergies and coordination with the co-supervisor in the non-academic sector if applicable. In case of co-supervision, explain the complementary roles of co-supervisors/mentors.
- Explain practical arrangements for supervision: frequency of individual meetings between the fellow and the supervisor(s), supervision arrangements at the main host organisation during secondments.
- Mention conflict resolution measures should a conflict between the researcher and a supervisor(s) arise.
- Make sure that particular supervision activities are in line with the **MSCA Guidelines on Supervision**.
- Mention progress monitoring and corrective measures. You could add something about to whom and how frequently the supervisor team will report about the fellow – to the PM team or to the Advisory Board or similar. Will the fellow be required to submit annual progress

reports? Have in mind that particular attention is paid to the quality of supervision and mentoring arrangements as well as career guidance.

- For **Doctoral Programmes** - It would be a benefit to state that all supervisors will take mandatory mentoring training to ensure that they are properly equipped to support doctoral researchers throughout their PhD and to ensure excellent and consistent supervision for all researchers in the training programme.
- If applicable, mention whether there is specific training provided at an institutional level, for example using **Vitae resources**.
- Specify that, in addition to the supervisory panel, each doctoral candidate could be assigned a buddy, who will provide assistance with relocation, language (when applicable), bureaucracy.

Quality of supervisors

- Provide a collective statement on the experience of the supervisors involved in your COFUND.
- In case of funding organisations, how will you assess the quality of the supervisors (for instance, some thresholds in terms of years of experience, past supervision record.)?
- If known, include a table outlining the potential supervisors, numbers of publications, H-index, numbers of postgraduates and postdocs mentored in the past and current postgraduates and postdocs (current mentees).

  - ✓ Describe how the potential and future career perspectives of selected researchers will be enhanced;

- Outline the role of the supervisor(s) in the researchers' training and in enhancing their future career perspectives.
- Use this section to expand further on the Career Development Plan (CDP). Say that all supervisors will be involved in its development and periodic revision. What is the ultimate goal of the CDP? How often will the CDP be reviewed and by whom?
- Introduce any career development support services present at the host organisation(s). This should include training in transferable skills.
- Detail the minimum number of developmental objectives the fellow will be expected to achieve per year. How will compliance be assessed?

  - ✓ Any other relevant point

⚠ *The following section of the European Charter for Researchers refers specifically to supervision:*

Supervision

Employers and/or funders should ensure that a person is clearly identified to whom researchers can refer for the performance of their professional duties, and should inform the researchers accordingly.

Such arrangements should clearly define that the proposed supervisors are sufficiently expert in supervising research, have the time, knowledge, experience, expertise and commitment to be able to offer the research doctoral candidate appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms.

⚠ ***Supervision*** *is one of the crucial elements of successful research. Guiding, supporting, directing, advising and mentoring are key factors for a researcher to pursue his/her career path. In this context,*

all MSCA-funded projects are encouraged to follow the recommendations outlined in the Guidelines for MSCA supervision[8].

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The supervision arrangement is excellent, including a supervisory team with interdisciplinary supervisors that also includes one from the fellow's secondment host. This arrangement is strengthened by the allocation of a named supervisor with a strong track record of scientific and supervision accomplishments to each doctoral candidate.* 2. *The supervision system is excellent, with a "triad-system": the host supervisor, the co-host supervisor, and a non-academic mentor. Supervisors are well qualified and receive appropriate training while the fellows benefit from additional support via the Training and Career Development team.* 3. *Supervision arrangements are at a high level and conceived as a team effort. Supervision quality is appropriately controlled through specific and mandatory training on supervision, imposing daily-basis supervision and limits on number of supervised students per mentor.* 4. *Supervision arrangements include a good frequency of meetings and training for supervisors for the PCDP process and MSCA guidelines for supervision.* 5. *Career development and guidance is strengthened by a Personal Career Development Plan, developed together with the supervisory team. The Plan is subjected to quarterly reviews by the mentor, and annually by a supervisory board, ensuring an effective progress monitoring and support mechanism.* 6. *The supervision is effectively embedded in a full doctoral training plan covering all aspects from research to career development and dissemination. The presence of a supervisory board and the training and dissemination board is important to control and to balance differences in supervisions and adds credibility to the approach.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *Qualifications and supervisors' experience are not well addressed, especially regarding non-academic supervisors.* 2. *The qualifications and supervision experience of supervisors are not sufficiently justified. Supervision training, the maximum number of concurrent thesis supervisions and other arrangements of quality assurance are not adequately provided.* 3. *Given that the researchers have to pre-select a specific PhD topic before applying, it is unclear whether there are possibilities of changing project or supervisor in case of personal or technical difficulties in the development of the project.* 4. *It is not clear who the Scientific Coordinator is and what is his/her role in the selection process.* 5. *Career guidance and career development perspectives is not sufficiently elaborated; for example, it is not fully clear if and how doctoral candidates aiming at a career in academia could gain teaching experience.*

[8] While the Guidelines for MSCA supervision are non-binding, funded-projects are strongly encouraged to take them into account.

2. Impact #@IMP-ACT-IA@#

2.1 Strengthening human resources good practices at institutional, regional, national or international level, in particular through aligning the practices of participating organisations with the principles set out by the EU for human resources development in research an innovation

- ✓ Outline how the proposed Programme will impact on strengthening research human resources at the institutional, regional, national or international level;

- Break into three sections or two if the regional and national level can be combined. For Doctoral Programmes in both sections you should refer, as appropriate, to the **EU Principles for Innovative Doctoral Training** and to **'Salzburg II Recommendations'**.

Regional level/ National level

- Describe how the Programme will help to increase the attractiveness of the participating organisations to talented researchers thus building up talent in the region. Related to this goal, what are the benefits of training this doctoral/postdoctoral cohort?
- How will this COFUND enhance the networking opportunities and the visibility of the host (and partners)? How will it reinforce the organisation's position and visibility at a global level, but also at a regional/national level by helping them become key actors and partners in the local socio-economic ecosystem.
- Do the objectives of the COFUND Programme address any key priorities/needs at a research level? What is the benefit of building a critical mass of skilled researchers in this thematic area?
- How does the COFUND Programme meet the needs at a national or regional level? For example, does the COFUND Programme align with national/regional policies/strategies such as Research and Innovation Strategies for Smart Specialisation (RIS3 strategies) and/or others?
- Have in mind the possible synergies with other Programmes (for example Cohesion policy funds) or complementary with Erasmus + programme). More information is available in the document **Synergies between the Marie Skłodowska-Curie Actions and Erasmus+ in the area of higher education.**

International level

- Highlight how the Programme will impact on the international, interdisciplinary and intersectoral mobility of researchers in Europe. How will best practices be transferred to others?
- Describe how the Programme will strengthen Europe's human capital base in research and innovation and will aid the structure of a stronger European Research Area where knowledge, technology and researchers circulate freely.
- Describe how the Programme will increase Europe's attractiveness as a leading destination for research and innovation (provide specific information in relation to the research field). Also, refer to the excellent working conditions offered to researchers.
- Describe how the Programme will have an impact on better quality research and innovation, contributing to Europe's competitiveness and growth and/or will address a European societal challenge.

- ✓ Describe how the Programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I (such as Charter and Code , or the Principles for Innovative Doctoral Training for Doctoral Programmes) at the participating organisations;

- Include information here if your institution as beneficiary, and/or implementing partners have been awarded the HR Excellence in Research Logo.
- Outline how the Programme aligns with the practices and policies in the context of the **EU Human Resources Strategy for Researchers (HRS4R)** and the **Charter and Code** etc. For Doctoral Programmes, describe how the COFUND is structured according to the EU 'Principles for Innovative Doctoral Training' and the 'Salzburg II Recommendations'.
- Mention alignment with national regulations and provisions concerning social security and pension, provision for maternity/parental leave.
- Mention again how gender issues / researchers at risk have been considered in working conditions.
- Remind the evaluator that the proposed Programme will contribute to achieving the expected impact of COFUND:
  - Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.
  - Aligning of practices and policies in the context of the **EU Human Resources Strategy for Researchers (HRS4R)**, enhanced implementation of the **Charter and Code** and the EU **Principles for Innovative Doctoral Training** at regional, national or international level.
- If applicable, explain how your COFUND Programme ensures excellent working conditions for the researchers and how it will spread best practices in research training across the host, the partners and beyond, having a positive structuring effect on the organisations involved.

✓ Any other relevant point.

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *Contribution of the programme to enhancement of human resources on a national and regional level is clearly explained. The high-quality standard principles and procedures put into action in the programme will have a positive impact on HR management by initiating new practices at the doctoral level, and setting new standards and principles. This project will additionally boost collaboration between partners in the implementation of their HR strategies for Researchers.* 2. *With the beneficiary confirming that they will implement the programme processes at their partner institutions, the programme will help strengthen the local human resources trained in excellent research, thus boosting the local region capabilities. Coupled with the beneficiary holding the HR Excellence in Research accreditation this supports potential for the beneficiary to serve as a multiplier agent of the principles of the EU Charter & Code.* 3. *The applicant has been awarded the HR Excellence in Research label and is appropriately aligned to the EU principles for human resources development; additionally, the applicant has also adopted the EU principals for innovative doctoral training in the implementation of the programme.* 4. *The proposed programme fits very well into the national development plan and is aligned with the European Green Deal strategy.* 5. *The impacts of the programme at the various levels are duly considered and the programme will contribute to the region's competitiveness and economic growth with a focus on the challenges identified in the regional innovation strategy for smart specialisation. It is also suitably in line with key trends listed in the national innovation strategy.* 6. *The proposal has a major contribution at institutional level. For instance, the training programme of the COFUND project will benefit to other postdoctoral staff, the recruitment via the COFUND of fellows will expand the activity of the campus and its reputation.* 7. *The project defines appropriate KPIs for measuring the impact on HR processes, for example, quality of recruited fellows, number of attended training courses, number, quality and impact of scientific publications, etc.*

WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The impact of the programme on strengthening human resources on international level is not clearly elaborated, only very general statements are presented.* 2. *It is insufficiently described in the proposal how the beneficiary will ensure the alignment of practices set by the EU for Human Resources development within the participating organisations.* 3. *The proposal does not sufficiently explain how the programme will ensure alignment with good Human Resources practices at the partner organisations.* 4. *The impact generated by strengthening research human resources good practices at institutional level is not clear.*

2.2 Credibility of the proposed measures to enhance the career perspectives and employability of researchers and contribution to their skills development

In this section, please explain the impact of the research and training on the researchers' careers.

- Make a strong link between your Programme's elements, EU policies about researcher careers/employability, and any sectoral policies referring to a skill gap in the relevant sector.
- **Enhancing skills** (research-related and transferable skills) – What aspects of the Programme will allow the doctoral candidates/ postdocs to enhance their existing skills and improve their employability in and outside academia. Training (research and transferable skills)? Secondments? Mentoring? Networking?

  Focus on the impact of the skills on the doctoral candidates/postdocs' employability, and do not repeat how these skills will be delivered.
- **Career prospects** – give an indication of potential employment sectors that the doctoral candidates/postdocs might end up working in.
  - Explain the impact of the research and training on the researchers' short- and long-term **career perspectives.**
  - Consider both academic and non-academic career opportunities, both R&I and non-R&I positions (e.g., policy, management etc.). What are the relevant current and future labour market needs to which your COFUND Programmes can contribute?
  - State the potential employers of the doctoral candidates/postdocs post-Programme and how participating in this Programme will improve their attractiveness towards these employers (if possible, include some of your industry partners). State that the training Programme has been developed in conjunction with industry partners, so to ensure the alignment between employers' needs and skills development.
- How will the Programme **enhance networking and communication capacities** with scientific peers, as well as with the general public, that will increase and broaden the research and innovation impact? Mention it in relation to the enhanced employability of the doctoral candidates/ postdocs.
- How will the **intersectoral and interdisciplinary aspects** of the Programme impact on the doctoral candidates/ postdocs' careers (e.g., forge new mind sets and approaches to research and innovation work).
- If you are submitting a COFUND project as a continuation of an existing Programme, explain how the new COFUND action will **improve upon your current Programme**. Convincingly show how the COFUND action will strengthen your Programme and therefore the professional career development of the researchers. Mention the networking potential for the various cohorts of alumni of these Programmes.

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The programme presents very good evidence, including appropriate key performance indicators, on how it will enhance researchers' career perspectives and employability and their skills development.* 2. *Training programme strongly contributes to the development of research skills as well as entrepreneurship and IPR management skills, enhancing fellows' employability in both academic and industrial sectors. The offered start-up support is an additional strength.* 3. *Measures enhancing the career perspective of fellows are presented convincingly, including options in the industry.* 4. *Prior MSCA action experience of the Beneficiary benefits the fellows by an enhanced support system, e.g., career centre, career planning, and adjustment, impact tracking.* 5. *The potential career perspectives of the researchers will be enhanced through various measures as it is convincingly justified in the proposal, such as diversifying the skillset of the fellows, adding new networks, improving communication abilities.* 6. *The DCs will receive training and guidance to protect their discoveries and in exploitation / dissemination procedures through various paths, essential to accelerate knowledge transfer and patent analysis.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *Some aspects of how the program improves career perspectives are not explained fully, e.g., sustaining fellows' initiative, and gaining leadership knowledge and skills.* 2. *The proposal does not sufficiently describe how the selected researchers can exploit the connections with the non-academic sector developed during the programme.* 3. *Plans to ensure the impact of the research and training programme on the career perspectives of the PhD candidates are only generically described and concrete actions to ensure them are insufficiently elaborated.* 4. *International exposure and experience are insufficiently considered, undermining career prospects and cultural awareness.* 5. *The specific impact of some proposed very short fellowships on employability perspectives, as well as general mechanisms for tracking and evaluating the overall career progression of the fellows during the duration of the programme, are not fully substantiated in the proposal.*

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.

➢ Highlight your overall dissemination, exploitation and communication strategy. This strategy should be fellow-centric, with important involvement of the researchers, but without overloading them.

- Describe the target audiences for the dissemination of the research results and progress of the COFUND projects. Provide specific examples-types of research fields (internal and external to the beneficiary and partners), industry, commercial actors, policy makers etc.
- Describe the types of dissemination activities which will be used (articles, conferences, workshops, events, tradeshows, social media etc). Give examples for all the dissemination activities.
- A table could be included in this section indicating the specific activities, the target groups, the channels and who is the person responsible (doctoral candidate/postdoc, supervisor…) and minimum requirements for each doctoral candidate/postdoc.
- Mention if the doctoral candidate/postdoc will receive training for dissemination and communication skills.
- Plan a mechanism for monitoring dissemination activities at the programme level.

- Mention the role of the host institution's support staff (e.g., public relations offices).
  - Specifically mention training in communication, public engagement and education as part of the doctoral candidate/postdoc training Programme.
  - If any specific competencies on this topic (e.g., content creation) are present in the network, highlight them.

- **Exploitation** is the use of 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:

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

- Remember that this is the **Impact** section. Describe the potential impact of exploiting the commercial potential of the research results.
- 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**

- Highlight how the doctoral candidates/postdocs will be trained to identify opportunities for exploitation (can link back to section 1.3) and how they will be supported in their exploitation efforts.

For additional support in dissemination, exploitation 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.
- Explain who will help you with maximising media coverage, e.g., Communications or Marketing Office/Officer.
- Mention specific kinds of activities which the doctoral candidate/postdoc will take part in to communicate their results / interact / educate the general public (e.g., press releases to newspapers, feature articles in magazines, articles on social media) – link to existing outreach and education Programmes at the host organisations.
- Is there any potential to have the Programme featured on local/national TV or radio in any of the countries in the consortium?

- **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 will be planned to engage the general public about the activities of your COFUND Programme – work of the doctoral candidate/postdoc. Have in mind that doctoral candidates and postdocs should be actively involved in public engagement and communication activities.
- Some activities in which a doctoral candidate/postdoc might take part could include:
  - Open Door communication: Students/public visit the fellow's institution/lab, etc., to discuss project activities.
  - Visit schools, universities, community organisations to promote their research.
  - Public/societal engagement events (for example, European Researchers' Night Event).
  - Articles in a newspaper about the researchers' activities and the overall COFUND Programme (restate the support of your outreach officer).
  - Use of the COFUND's social media channels (specifying which accounts will be set up).
  - Researchers writing blogs to publish on host website and COFUND website.
  - Press release by the COFUND PM.
  - Brochures about the project.
  - E-newsletters, video blogs.
  - Multimedia releases (video clip via YouTube explaining the researchers' work).
- Apart from communicating the research results, there is also the aspect of communicating the results of the overall Programme, i.e., the outcomes of calls and the researchers themselves. For example, press releases about call results with details of the funded researchers, disseminating short video interviews of the researchers talking, etc.

⚠ *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.*

- 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 and relevant characteristics that may have an effect on IPR:
  - Intersectoral exchange (academic/non-academic) 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 exploitation of complementary competences of the participants (host organisation and secondment host organisation) – granting access to background/results for/by secondees (''visitors'').

➢ State that management of IP will be in line with any national IP protocols.
➢ If IP agreements are already in place with industry partners for secondments (associated partners), mention this also.
➢ 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.
➢ Mention if you have the support of a highly-experienced institutional Technology Transfer Office and host-dedicated support. State how often the research projects will be reviewed to look for potential IP.
➢ Mention that the researchers will receive training on IP management through carrying out their project and also through structured training.

⚠ *If your project is selected, we encourage you to have a 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 #@COM-DIS-VIS-CDV@#

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. Senior researchers, in particular, are expected to take a lead in ensuring

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.

#§COM-DIS-VIS-CDV§#

- *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 project includes a clear dissemination plan for the overall project and an individual plan (PDCP) for each PhD candidate which is positive.* 2. *Dissemination of results to the research community through open access articles, participation in conferences and workshops is properly discussed.* 3. *The programme presents well-defined strategies for dissemination and outreach activities, planned around identifying the target to be reached and tools to be used. Communication activities to different audiences are also very effectively arranged, some channels are identified, and targets proposed.* 4. *The mandatory requirement in relation to the dissemination and the communication activities for the fellows is appropriate and the monitoring and technical support provided to them are well structured.* 5. *The communication plan is well structured, with different activities and relevant channels for different target groups. Planned evaluation and monitoring of progress in all communication activities is credible. The plan outlines concrete activities, communication channels, responsible persons and requirements for ESRs and will be fine-tuned and constantly updated during the project. Researchers will have the opportunity to be directly involved in public engagement activities, which is positive.* 6. *The proposal includes a coherent Intellectual Property Rights policy for the protection and exploitation of research outcomes, in line with institutional, national and Horizon Europe requirements. The proposed exploitation plan is convincing and supported by adequate training in IPR issues to the candidates and involvement of a dedicated Technology Transfer Office.* 7. *The project also has an established management protocol and strategy for intellectual property and commercialisation aspects of the research results that will be ensured by an experienced in-house knowledge transfer team in collaboration with the other partner organisations.* 8. *Strategy for the management of IP is well planned, as the fellows will receive training on IPR, a workshop specific for patents, and training on entrepreneurship.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The proposal does not clearly outline how the dissemination and exploitations activities will be embedded in and monitored within the doctoral candidates' career development plans.* 2. *The outlined dissemination and communication activities are not appropriately described and justified with dedicated Key Performance Indicators (KPIs). Specifically, audiences that will be targeted or dedicated outreach activities are not precisely presented and specific actions are not always thoroughly explained.* 3. *Some activities of the dissemination plan are insufficiently detailed, e.g., quantification for the actions foreseen and indicators are not clearly presented.* 4. *The exploitation plan is not satisfactorily elaborated, namely regarding its strategy and specific measures.*

5. *The public engagement communication plan lacks a clear definition of the methods, tools and timing of events and actions. The channels and tools are not strictly connected to target groups, messages, timing and key performance indicators.*
6. *Intellectual Property Rights (IPR) issues are not described in detail and concrete actions to be implemented both during and after the end of the project are not clearly identified.*

3. Quality and Efficiency of the Implementation #@QUA-LIT-QL@# #@WRK-PLA-WP@# #@CON-SOR-CS@# #@PRJ-MGT-PM@#

3.1 Quality and effectiveness of the work plan, management, structures, assessment of risks and appropriateness of the effort assigned to work packages

Describe the management plan of the Programme and the resources.

- Use a figure to outline the organisation and management structure. Refer to the Gantt chart for the call timeline. Suggested organisation (but others may be appropriate) could include:
  - Programme Coordinator (PC).
  - Programme Manager (PM).
  - Host operations Team (Finance, grant management, research office, TTO/commercialisation, HR etc).
  - Supervisory Board (including both supervisors and representatives of doctoral candidates/postdocs) – tasked with monitoring progress of the research Programme, gender equality, progression issues or disputes, IPR, Communication and dissemination and risk management.
  - Steering Committee- tasked with oversight and governance. The Steering Committee (SC) should be gender balanced and include both internal and external representatives, all of them qualified enough to bring meaningful input and contribution to the Programme. See, as an example, the following Steering Committee composition: Project Coordinator, Institutional research representatives, HR department representatives, and industry representative.

- Outline the responsibilities of the PC versus the PM, and the frequency of regular meetings between the two. Explain the responsibilities of the various committees.
- Outline the frequency of meetings of the various committees and the decision-making processes.
- It is important to include how the projects and the doctoral candidates/postdocs will be monitored. For example, explain the monitoring of the individual projects and how the Programme will be assessed.
- Outline the process for conflict resolution and a strategy for dealing with scientific misconduct.

For sustainable project management, you can refer to **the MSCA Green Charter.** Some measures that can be considered 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.

Required sub-headings:

- Work Packages description (please include table 3.1a);

- For ease of reading, move the WP tables up into this section, before the Gantt chart.
- In WP4 Training and Career Development, besides research, don't forget to mention transferable skills training.
- Beside stated mandatory work packages, add one more WP 6-Dissemination, exploitation and communication.
- Acknowledge the effort of all participating actors to the different work packages.

- List of major deliverables (please include table 3.1b, including the awarding of doctoral degrees;

- Be aware that the following deliverables will have to be submitted for grants awarded under this topic (as stated in 2021-2022 Work Programme):
  - **mid-term meeting** organised between the participants and the granting authority;
  - **mobility declaration** submitted within 20 days of the start of the research training activities, for each researcher, and updated (if needed) via the Funding & Tenders Portal Continuous Reporting tool;
  - **career development plan**[9]: a document describing how the individual Career Development Plans have been established (listing also the researchers for whom such plans have been put in place), submitted towards the end of the project;
  - **evaluation questionnaire** completed by each recruited researcher and submitted at the end of the research training activity; a follow-up questionnaire submitted two years later;
  - **data management plan** submitted at mid-term 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.

- Include a timeline or Gantt Chart giving an overview of at least the:
  - ✓ Expected start and end date of the action (number of months);
  - ✓ Opening/Closing date of the call(s);
  - ✓ Number of fellowships offered per call;
  - ✓ Evaluation timeline;
  - ✓ Expected/planned start/end date of the researchers' appointments.

- Also include:
  - Summer schools/training events,
  - Information on communication and dissemination activities,
  - Programme review,
  - PR activities for each call,
  - Post-call comms/dissemination activities of the Programme.

- The Gantt chart should be visual and clear and should show all the concepts established in the template. It should reflect the timeline of the selection process and of the training programme.

[9] DCP definition is available in the **MSCA Work Programme 2021 – 2022** and at the beginning of this handbook.

- List of major milestones (please include table 3.1c);

➢ Ensure the number of deliverables and milestones is manageable from an implementation point of view.
➢ Milestones and deliverables are not the same. Refer to the definitions at the start of this handbook.

- List of critical risks for implementation (please include table 3.1d)

➢ Include a table outlining the risks within each work package that would affect the implementation of the Programme.
➢ Make sure to include both risk mitigation (how to minimise the chances of a risk happening) and contingency measures (what to do if a risk actually occurs). Make sure the degree of the risk is credible (e.g., a risk of conflict between a fellow and a supervisor cannot be "low")
➢ Risks may include: conflicts between fellow and supervisor, conflicts between two co-supervisors, researchers' drop-out of the programme, absence of partner for a planned secondment, insufficient number of suitable applicants, lack of project progress, scientific misconduct, potential problem during the execution of the research, difficulties with ethical approval, with COVID-19 pandemic, parental/sickness leave, etc.

#§CON-SOR-CS§# #§PRJ-MGT-PM§#

Note – The following work packages and pre-filled deliverables are mandatory, and constitute a minimum requirement (if necessary you may enhance these deliverables by adding additional ones).

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

Table 3.1 a Description of Work Packages

WP Number	1	**Start Month – End Month**
WP Title	*Management*	
Objectives		
Description of Work and Role of the Beneficiary / Associated or Implementing partners *(possibly broken down into tasks), indicating lead participant and role of other participating organisations*		
Description of Deliverables *(brief description and month of delivery)* …		
WP Number	2	**Start Month – End Month**
WP Title	*Dissemination of the Programme and its Calls*	
Objectives		
Description of Work and Role of the Beneficiary / Associated or Implementing partners *(possibly broken down into tasks), indicating lead participant and role of other participating organisations*		
Description of Deliverables **D 2.1 Report/s on communication and dissemination activities** **D 2.2 Inform for each call the Project Officer by sending the link to the Euraxess website where the Call has been published** **…**		

(brief description and month of delivery)		
WP Number	3	**Start Month – End Month**
WP Title	*Evaluation and Selection*	
Objectives		
Description of Work and Role of the Beneficiary / Associated or Implementing partners *(possibly broken down into tasks), indicating lead participant and role of other participating organisations*		
Description of Deliverables **D 3.1 Report for each call on evaluation and selection** **…** *(brief description and month of delivery)*		
WP Number	4	**Start Month – End Month**
WP Title	*Training and Career Development*	
Objectives		
Description of Work and Role of the Beneficiary / Associated or Implementing partners *(possibly broken down into tasks), indicating lead participant and role of other participating organisations*		
D 4.1 Report on training & career development after the end of each reporting period **…** *(brief description and month of delivery)*		
WP Number	5	**Start Month – End Month**
WP Title	*Ethics*	
Objectives		
Description of Work and Role of the Beneficiary / Associated or Implementing partners *(possibly broken down into tasks), indicating lead participant and role of other participating organisations*		
D 5.1 Report for each call on ethics issues **…**		

Table 3.1 b Deliverables List

⚠ *The deliverables should be divided into management, dissemination of the Programme and its calls, evaluation and selection, training and career development and ethics deliverables. The number of deliverables in a given Work Package must be reasonable and commensurate with the Work Package content. Note that during implementation, the submission of the deliverables to the REA will be a contractual obligation.*

⚠ *Note that, if the proposal is successful, several mandatory deliverables will be added during the Grant Agreement preparation such as the progress report, due at month 13; the career development plan, the data management plan, etc. (full list in the MSCA Work Programme – Definitions section, paragraph 1.6).*

Deliverable Number[10]	Deliverable Title	WP No.	Type[11]		Due Date

[10] 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.

[11] Please indicate the nature of the deliverable using one of the following codes:
R = Report; **ADM** = Administrative (website completion, recruitment completion, etc.); **PDE** = dissemination and/or exploitation of results; **OTHER** = Other, including coordination.

				Dissemination Level[12]	

Table 3.1 c Milestones List

Milestone number	Milestone name	Related work package(s)	Due date (in month)	Means of verification

KEY
Due date
Measured in months from the project start date (month 1)

Means of verification
Show how you will confirm that the milestone has been attained. Refer to indicators if appropriate. For example: Publication of the Call - The call will be published via all outlined dissemination channels.

Table 3.1d Critical risks for implementation #@RSK-MGT-RM@#

- *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.*
  The likelihood (low/medium/high) is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.
  The severity (low/medium/high) is the realative seriousness of the risk and tge significance ot its effect.

[12] 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; Please consider that deliverables marked as "PU" will automatically be published on CORDIS once approved: the applicants should therefore consider the relevance of marking a deliverable as "PU";
CI = Classified: classified information as intended in Commission Decision 2001/844/EC.

Description of risk (indicate level of (i) likelihood, and (ii) severity: Low/Medium/High)	Work package(s) involved	Proposed risk-mitigation measures

#§RSK-MGT-RM§#

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The work plan is clearly articulated, the work package breakdown is well structured around five main work packages (WP) and appropriate effort is assigned. Work packages cover all relevant aspects and activities and are in line with the proposed program.* 2. *Appropriate deliverables will facilitate the monitoring the project's progress.* 3. *The proposal correctly visualises the main tasks in a Gantt Chart avoiding overlaps.* 4. *Risks assessment is well-considered, showing suitable estimation of the impact and likelihood of a range of important risks and proposing appropriate mitigation measures. The effectiveness of risk monitoring procedures is convincing, suitably addressed in the work plan and associated with clear management body.* 5. *The overall management structure appropriately distinguishes between day-to-day and strategic management, and also between managing and supervisory duties & responsibilities.* 6. *The monitoring and evaluation of the project phases are very well designed with several instruments to measure progress and changes, including individual project mid-term reports and final reports, focus groups, and a programme evaluation.* 7. *The competence and experience of the Scientific Training Coordinator and the Programme Manager who will supervise the project proposal are well demonstrated and will bring added value in the decision-making process.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The work plan is not well elaborated. The description of work packages lacks clarity on the implementation of the activities. The Gantt chart provided does not depict correctly the planned activities and includes inconsistencies in the timeline (e.g., start/end dates of recruitment).* 2. *Deliverables and milestones are not well developed. For example, the list of deliverables does not match those in the WP description nor the due dates reported (e.g., D1.2 and D6.2 are missing from the list), and some of them are scheduled beyond the work package timeline (e.g., D3.1 for WP3). The list of milestones does not sufficiently include all the control points of the project; for example, the publication of the calls is not clearly stated.* 3. *Some critical risks are insufficiently identified, for example, risks associated with mobility and the administrative aspects of the doctoral candidates' stays, and conflict between doctoral candidate and supervisor/s.* 4. *The described management structures and procedures are not described clearly enough (e.g., composition of supervisory board, workloads, respective roles and coordination of project manager and head of programme).* 5. *The proposal provides limited detail on an external quality assessment undertaken during and at the end of the project to monitor the progress and evaluate success of the programme. The proposed internal self-assessment procedure is not fully credible.*

3.2 Quality and capacity of the host institution(s) and participating organisations (where appropriate), including hosting arrangements and extent to which they bring together the necessary expertise to successfully implement the research training Programme.

Required sub-headings:

- Appropriateness of the infrastructure and capacity of each participating organisation, as outlined in Section 5 (Participating Organisations), in light of the tasks allocated to them in the research training Programme;

- Describe how you and the implementing/associated partners have the necessary infrastructure (research and administrative) to implement all aspects of the Programme (selection procedure, research, training, admin, communications, exploitation etc.).
- Highlight the experience of the project coordinators and other steering committee members in FP7, H2020/HE and MSCA funding – take care to highlight in particular the EU funding and project management experience of the project coordination team.
- Outline the experience required for the role of PM – if you have already identified a PM, briefly mention their profile and relevant experience.

- Support offered to the candidates/researchers during the application/recruitment/implementation by the host/participating organisations;

- You can reiterate the project's commitment to the Charter and Code and note which organisations have been awarded the HR Excellence in Research Award, if relevant.
- Explain the support offered by each institution to the researchers at each stage of the selection and implementation process:
  - Application process - refer back to all the information provided to applicants that you detailed in the Excellence section, helpdesk, support provided from supervisors and the host institutions.
  - Recruitment process - what support services and processes will be used upon recruitment? The researchers will be moving to the host country so what support will they receive to integrate into their host country (e.g., EURAXESS services to support researchers)?
  - Implementation process - what support will be offered to researchers once they are appointed (induction day, supervisory support, social events, communication platforms etc.)?

- If applicable, Consortium composition and exploitation of participating organisations' complementarities: explain the compatibility and coherence between the tasks attributed to the beneficiary/implementing partner/associated partner in the research training Programme, 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.

- If applicable, explain how the consortium is exceptionally well-qualified to implement this Programme by referring to:
  - Complementarities/synergies between all participants and how these will be exploited to deliver an excellent Programme (use a diagram or table).
  - How their previous experience makes them suitable for their tasks in this Programme.
  - Also, state if you have had previous direct experience with cooperation in research projects (e.g., previous COFUND, MSCA ITN, MSCA RISE, COST Action or another collaborative research project).

- Note any relevant expertise in social sciences and humanities, open science practices, and gender aspects of R&I among the partners.

- Commitment of the beneficiary and implementing/associated partners to the Programme – if applicable (for associated/implementing partners, please see also sections 5 and 6). The role of associated/implementing partners and their active contribution to the research training Programme should be described. A letter of commitment shall also be provided for implementing and associated partners in section 6 and must follow the template (included within the PDF file, but outside the page limit).

- Describe the organisations (implementing partners) that will be recruiting and hosting researchers.
- Describe the trainings that will be provided and financial contribution.
- Describe the organisations (associated partners) who will be hosting researchers without recruiting (for example, non-academic organisations who will be taking researchers on secondments). Mention if they will also provide training and any financial contribution.

STRENGTHS FROM THE EVALUATION SUMMARY REPORTS
1. *The beneficiary demonstrates high competencies to implement the programme based, for example, on previous experience and appropriate administrative, technical and human resources. The research infrastructure and facilities that will be provided by the participating organisations are also very good.* 2. *The role, competences, capacity, infrastructure, experience in hosting international students, and complementarities of the host institution and the associated partners are clearly specified and convincingly documented in the proposal.* 3. *The managerial and administrative support of the host institution is well described, and it is appropriate at each stage of the programme, incl. support for residence and mobility issues for all the doctoral candidates which enables their smooth integration.* 4. *The overview of academic and inter-sectoral participating organizations is provided, with commitments to the research and training capacity needed for successful implementation of the programme in general properly confirmed by commitment letters.* 5. *The applicant has a good infrastructure and capacity to host the programme, with previous experience in coordinating international projects and a dedicated grants office.* 6. *The host and the participating organisations show complementary expertise and a high level of involvement. Hosting arrangements are appropriately presented and will successfully support the recruited researchers throughout the programme.*
WEAKNESSES FROM THE EVALUATION SUMMARY REPORTS
1. *The secondment hosting arrangements of the participating partner organisation have not been addressed sufficiently.* 2. *Information on the quality, capacity, infrastructure, and compatibility of participating organisations lack details.* 3. *The hosting arrangements for foreign doctoral candidates are not sufficiently described.* 4. *One commitment letter is signed but out of date. In some cases, the commitment letters of the Associated Partners do not follow the established mandatory template of the MSCA-COFUND HE call.* 5. *Mechanisms to oversee and manage the involved partners in the context of conflict resolution between supervisors and doctoral candidates and integration of additional future partners, are not satisfactorily described.* 6. *How complementarities with associated partners will be ensured throughout the programme is not adequately elaborated in the proposal.*

STOP PAGE COUNT – MAX 30 PAGES (SECTIONS 1-3)

Part B2

DOCUMENT 2 (*no overall page limit applied*)

4. Ethics

Actions carried out under Horizon Europe shall comply with ethical principles and relevant Union, national and international law, including the Charter and the European Convention for the Protection of Human Rights and Fundamental Freedoms and its Supplementary Protocols.

Particular attention shall be paid to the principle of proportionality, to the right to privacy, the right to the protection of personal data, the right to the physical and mental integrity of a person, the right to non-discrimination and to the need to ensure protection of the environment and high levels of human health protection.

Ethics is important for all research domains. Informed consent and confidentiality are as important for a sociological study as they are for clinical research.
In this context, please be aware that it is the applicants' responsibility to identify any potential ethics issues, to handle the ethics aspects of their proposal, and to detail how they plan to address them.

Please describe in this section the ethics procedure to be implemented. For COFUND Programmes, it is often not known in advance if the fellowships to be funded will raise ethics issues. Therefore, it is important to describe how the proposal meets the European as well as the national legal and ethics requirements of the country or countries where the tasks raising ethics issues are to be carried out. In particular, applicants should take care to describe the ethics procedures that they will enforce in the execution of the Programme (at application phase, selection and evaluation phase, monitoring and follow-up of projects, and the trainings on ethics). Successful COFUND Programmes, when opening their calls for proposals, will have to detail the procedure to be followed for addressing proposals raising 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.
  - Guidance on **How to complete your ethics self-assessment**

- Read research, risk-benefit analyses and ethical issues: **A Guidance Document for Researchers Complying with Requests from the European Commission Ethics Reviews**
- More information on ethics is available in **HE Programme guide** (from page 21)

5. Partner Organisations

Please list and detail the role of the partner organisations (implementing/associated - if known), including their financial contribution to the Programme (when applicable):

Table 5.1

Partner organisation name	Partner organisation short name	Country	Implementing Partner (tick)	Associated Partner (tick)	Academic (Y/N)	Role			
						Hosting researchers WITH recruiting (Y/N)	Hosting researchers WITHOUT recruiting (Y/N)	Providing other training or career development opportunities (Y/N)	Financial contribution in EUR (if applicable)

Note that:

- *Any relationship between different participating organisations or individuals (e.g., family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff, etc.)* ***must*** *be declared and justified;*
- *The data provided relating to the financial capacity of the beneficiary will be subject to verification during the grant preparation phase.*

In addition, all partners (whether the implementing or associated partners[13]) must complete the appropriate table below. Complete one table of maximum half a page per associated/implementing partner (**minimum font size: 9**).

For **Associated partners (if applicable one per associated partner):**

Associated Partner Legal Name:	**Country:**
General description	
Key Persons and Expertise (including supervisors)	
Key Research Facilities, Infrastructure and Equipment	
Previous and Current Involvement in Research and Training Programmes	

For **Implementing partners (if applicable one per implementing partner):**

Implementing Partner Legal Name:	**Country:**
General description	
Key Persons and Expertise (including supervisors)	
Key Research Facilities, Infrastructure and Equipment	
Previous and Current Involvement in Research and Training Programmes	

[13] Please include partners in the relevant table either Implementing or Associated. For Associated Partners please also include them in the part A of the proposal in the relevant section.

6. Letters of Commitment

- Letters of commitment should be in English.
- The letter should be on letterhead, dated and signed.

Please use this section to insert scanned copies of the required **letters of commitment**.
Implementing partners and 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.6. The expert evaluators will be instructed to disregard the contribution of any implementing or 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 implementing/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.

These letters should be signed by an **authorised legal representative** of the organisation in question so as to offer reasonable assurance regarding the commitment in the involvement in the research training Programme.
In case the letter does not follow in full the template or fails to give enough assurance on the 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.

Besides providing the letters, you should fill in the overview of all identified Partner Organisations (Implementing and Associated) in Table 5.1

6.1. Template of Commitment letter for implementing/associated partners

- On headed paper of the entity

- Beyond any additional information that the participating organisation wishes to indicate in its Letter of commitment, the following text should appear in all its parts and with no modifications:

I undersigned[14] .....…, in my quality of[15] ……..…, commit to set up all necessary provisions to participate as associated partner (or implementing partner …….) in the proposal ……..… submitted within the call HORIZON-MSCA-COFUND-2022, should the proposal be funded.

On behalf of [*name of the entity*], I also confirm that we will participate and contribute to the research training Programme (Doctoral or Postdoctoral) as planned. In particular, our [*name of the entity*] 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, if a financial contribution is expected then specify the amount*].

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

Name, date, signature

[14] First name and surname.
[15] Role in and name of the Institution/Doctoral/Postdoctoral School.