



# Staff Exchanges Handbook Call 2025

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NETWORK OF THE NATIONAL CONTACTS POINTS FOR THE MARIE SKŁODOWSKA-CURIE ACTIONS (MSCA)

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Task 3.1	Handbooks and Submission Guides
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## Abbreviations

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

## Disclaimer

This Handbook is an UNOFFICIAL document prepared by RADIANCE, 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 MSCA-NET project by the Croatian Agency for Mobility and EU Programmes.

The information contained in this document is intended to assist and support, unofficially and practically, anyone submitting a proposal to the MSCA Staff Exchanges Call with the deadline of 8 October 2025. 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 2023-2025, Guide for Applicants for Staff Exchanges 2025, and official FAQs prepared by the European Research Executive Agency (REA).

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

For the purpose of the Handbook, Version 5.0 of the MSCA SE Proposal template is used (published on 27 March 2025). 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.

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

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## Acknowledgements

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## How to use the Handbook

This Handbook should be used in conjunction with the MSCA Work Programme 2023 – 2025, Guide for Applicants, official FAQs and proposal templates and Standard application form (HE MSCA SE), downloaded from the call webpage on the Funding & Tender Opportunities Portal. Please note that the information in this Handbook complements the information contained in the template for Part B of the proposal.

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

**NOTE:** *With the harmonisation with the rest of the HE Programme, from the 2024 call onwards, REA is no longer using the 'Strengths and weaknesses' separated format in its Evaluation Summary Reports (ESRs). Instead, the SE 2025 ESRs will include paragraphs for each evaluation criterion.*

## MSCA Staff Exchanges essentials

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

<b>MSCA SE DEADLINE</b>	<ul style="list-style-type: none"> <li>• <b>8 October 2025, 17:00 Brussels time</b></li> <li>• You can submit your application at any time before the deadline. Once submitted you can reopen, edit and resubmit your proposal as many times as required before the call deadline. Only the last submitted version of the proposal will be evaluated. Please start early!</li> </ul>
<b>CONSORTIUM REQUIREMENTS</b>	<ul style="list-style-type: none"> <li>• <b>Countries:</b> only legal entities established in EU Member States (MS) or Horizon Europe Associated Countries (AC) can be beneficiaries.</li> <li>• <b>Organisations:</b> At least three (3) independent legal entities in three different countries, two (2) of which established in a different EU Member State (MS) or Horizon Europe Associated Country (AC). Above this minimum, the consortium may include other legal entities, including International European Research Organisation (IERO) and entities from Third Countries (TC) under the conditions provided by the Horizon Europe Rules for Participation (for more details see the <a href="#"><u>Horizon Europe Programme Guide</u></a>).</li> <li>• <b>Sectors:</b> If you plan to have the consortium set up from organisations established in MS/AC only, at least one organisation should belong to a different sector (academic or non-academic). If all participating organisations are from the same sector, there must be at least one organisation from a non-associated TC.</li> </ul>
<b>ELIGIBLE SE-CONDMENTS</b>	<ul style="list-style-type: none"> <li>• Secondments between institutions established in different MS or AC and institutions established in different non-associated TC, MS or ACs.</li> <li>• Secondments between organisations within MS and AC should mainly be inter-sectoral (academic/non-academic sector<sup>1</sup>); same-sector secondments are also possible (to a maximum 1/3 of total implemented secondments eligible for funding). If the proposal is considered as interdisciplinary by the evaluators.<sup>2</sup> Secondments must always be between different countries.</li> </ul>
<b>RESUBMISSION</b>	<ul style="list-style-type: none"> <li>• For the MSCA SE calls there is no resubmission restriction.</li> <li>• If you intend to re-submit a proposal, you must indicate re-submission in Part A of the project proposal, including the reference number of the previously submitted proposal.</li> <li>• For resubmissions, don't only focus on the Evaluation Summary Report (ESR) from the previous submission. Review the proposal as a whole to find room for improvement. Your new proposal is not being evaluated in comparison with the old one. Evaluators will have access to the previous ESR in the consensus meeting only after they have evaluated the new proposal.</li> <li>• 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 2025 MSCA SE call.</li> </ul>

<sup>1</sup> Definitions of academic and non-academic sector are available in the [MSCA Work Programme 2023.-2025](#) (Special conditions chapter)

<sup>2</sup> The interdisciplinarity of the proposal is assessed under the Excellence criteria.

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

<b>CONSORTIUM AGREEMENT</b>	<ul style="list-style-type: none"> <li>During the preparation of the proposal, the coordinator should initiate negotiations and discussions with the other beneficiaries on the key terms of the consortium: project implementation, internal organisation and management, project budget and distribution of EU funding, additional IP rules, rights and obligation of consortium partners, etc. You will also need to address how the consortium has agreed to manage IP under section 2.3. (The Strategy for the management of intellectual property, foreseen protection measures, etc.)</li> <li>In most cases, the Consortium Agreement (CA) is signed before the signature of the Grant Agreement (GA) and should complement the GA but must not contain any provision contrary to it or the Work Programme.</li> </ul>
<b>PARTNERSHIP AGREEMENT</b>	<ul style="list-style-type: none"> <li>When associated partners are involved, the beneficiary is encouraged to sign a Partnership Agreement (PA) with them to regulate the internal relationship between all participating organisations.</li> </ul>
<b>GENDER EQUALITY PLAN</b>	<ul style="list-style-type: none"> <li>Having a Gender Equality Plan (GEP) is an eligibility criterion for public bodies, higher education establishments and research organisations from MS/AC. Once a project proposal is selected, consortium partners concerned by this eligibility criterion will have until the Grant Agreement signature to confirm they have a GEP in place.</li> </ul>
<b>PLAN FOR THE EXPLOITATION AND DISSEMINATION OF RESULTS INCLUDING COMMUNICATION ACTIVITIES</b>	<ul style="list-style-type: none"> <li>According to the <u>Horizon Europe - Work Programme 2023-2025 General Annexes, general conditions</u> (part 13, page 4) as an admissibility condition, applications must include a plan for the exploitation and dissemination of results including communication activities, <u>unless provided otherwise in the specific call conditions</u>.</li> <li>If the expected exploitation of the results entails developing, creating, manufacturing and marketing a product or process, or in creating and providing a service, the plan must include a strategy for such exploitation.</li> <li>If the plan provides for exploitation of the results primarily in non-associated TC, the legal entities must explain how that exploitation is still to be considered in the EU's interest.</li> </ul>
<b>REQUIRED &amp; RECOMMENDED DOCUMENTS</b>	<ul style="list-style-type: none"> <li>Read the required documents that contain the rules and conditions for the call, the proposal template as well as the frequently asked questions (FAQs):             <ul style="list-style-type: none"> <li><b><u>Staff Exchanges Guide for Applicants 2025</u></b></li> <li><b><u>MSCA Work Programme 2023 – 2025</u></b></li> <li><b><u>Specific FAQs for Staff Exchanges call</u></b></li> <li><b><u>Proposal template and instructions on how to fill it in</u></b></li> <li><b><u>RADIANCE Q&amp;A Blog</u></b></li> </ul> </li> </ul>
<b>RADIANCE Policy Briefs</b>	<ul style="list-style-type: none"> <li>The Policy Briefs originally produced as part of the former NCP network project “MSCA-NET” (2022-2025) continue to serve as valuable resources under the current RADIANCE project. These briefs are designed to provide a short, but comprehensive overview of the European policy objectives and how these feed into shaping Horizon Europe. They aim to help researchers and organisations better understand the policy objectives in the context of the Marie Skłodowska-Curie Actions.</li> </ul>

**FAMILIARISE  
YOURSELF WITH  
THE SUBMISSION  
PROCESS**

- Available Policy Briefs are:
  - [Open Science](#)
  - [Missions in HE](#)
  - [Gender](#)
  - [Green Deal](#)
  - [Synergies](#)
  - [Supervision](#)
  - [Charter for Researchers Policy Brief](#)
  - [Widening](#)
  - [Artificial Intelligence](#)
  - [Ethics](#)

**UNDERSTAND  
WHAT IS RE-  
QUIRED FOR THE  
SUBMISSION**

- Proposals must be created and submitted on the **[Funding & Tender Opportunities Portal](#)** by a contact person of the coordinating organisation – using the coordinator'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](#)** and the **[RADIANCE Submission Guide](#)**.

- **Administrative forms (Part A)**  
Part A constitutes an integral part of your proposal; it is the part of the proposal where you will be asked for certain administrative details that will be used in the evaluation and further processing of your proposal. For more information, please refer to the **[Standard application form \(HE MSCA SE\)](#)** (pages from 1 to 17).

Also, in Part A, neither the beneficiaries nor the associated partners, are required to fill in the list of up to five publications, relevant previous projects, or significant infrastructure. This information however will need to be described in the relevant sections of Part B2 (Section 4 – table 6).

- **Narrative Part B** is composed of two separate PDF files (Part B1 and Part B2), which must be uploaded as separate PDF files:
- **Part B1**, containing a maximum of 32 A4 pages (not including the end page).
  - The Start Page must consist of 1 whole page.
  - The Table of Contents must consist of 1 whole page.
  - Section 1 (Excellence) must start on page 3 of the document.
  - The core of the proposal (section 1 – Excellence, section 2 – Impact and section 3 - Implementation) must have a maximum of 30 pages.
  - Any excess pages (i.e., numerical page 33 and beyond) will not be made available to the evaluators (automatically blanked out) and therefore will not be taken into account.
- **Part B2**, with no page limit, contains
  - Section 4. Participating organisations – one table of maximum one page for each beneficiary and half a page for each associated partner.
  - Section 5. Explanation for the use of generative AI in the preparation of the proposal (when applicable). When considering the use of

generative artificial intelligence (AI) tools for the preparation of the proposal, have in mind you are fully responsible for the content of the proposal (even those parts produced by the AI tool) and must be transparent in disclosing which AI tools were used and how they were utilized.

- Section 6. Environmental considerations in light of the MSCA Green Charter.
- Bear in mind that formatting (font type and size) for Part B1 must be continued for Part B2.

Applicants will **NOT** be able to submit their proposal in the submission system unless both Part B1 and Part 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

- You can contact your NCP via [Find your NCP MSCA | Horizon Europe NCP Portal](#)

## Key tips for proposal template and layout

(Standard application form HE MSCA SE)

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

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

- **Acronym:** Use a self-explanatory title and a memorable acronym. Don't forget that you will not be able to change the acronym once you submit your proposal on the Funding and Tenders Portal. The acronym will be on your proposal, and you will refer to it throughout your communication and dissemination activities. Ensure that the acronym is short, easy to pronounce, and easy to remember by the evaluators. Please also be careful that it cannot be construed as inappropriate or have a "double meaning" in another language. Here is a useful tool for creating an acronym: <http://acronymcreator.net/>
- Check [http://cordis.europa.eu/projects/home\\_en.html](http://cordis.europa.eu/projects/home_en.html) to see if an EU project with the same acronym already exists. An internet search could also be used to determine if the acronym is "protected".
- **Descriptors & free keywords:** In Part A, 1. General Information, choose carefully up to 5 (and at least 3) descriptors among the fixed descriptors related to your chosen evaluation panel that best characterise the subject of your proposal, **in descending order of relevance**. You can also enter any words you think give extra detail on the scope of your proposal.
- It is important to carefully choose your descriptors as they will be used to support REA services in identifying the best qualified evaluators for your proposal (matchmaking process between the descriptors of your proposal and the descriptors of the registered evaluators' expertise).

- Description on how to select the keywords is available in a **specific FAQ**.
- 2. Abstract**
- The abstract is a short description of your project (maximum 2000 characters including spaces). It should **NOT** be the usual scientific abstract.
  - The main elements are:
    - 1-2 sentences that put the project into context including the joint research and innovation objective.
    - Background information on the state of the art.
    - Specific aims and details of how this collaborative project will deliver its research and innovation objectives through the planned secondments and staff exchanges.
  - The abstract in Part A should not contain sensitive information, as it 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.
  - See examples of existing projects in CORDIS (using filters **Projects – Horizon Europe – Marie Skłodowska-Curie actions**)

### **3. Additional ethics information**

- If you entered one or more ethical issue/s in the ethical issues table in Part A of the proposal, then you must also submit an ethics self-assessment field in Part A. More information is available in **How to complete your ethics self-assessment guide**.
- Follow the comprehensive information provided in the Template Part B-1.
- Read **Research, risk-benefit analyses and ethical issues: A Guidance Document for Researchers Complying with Requests from the European Commission Ethics Reviews**
- If no ethics issues are associated with your project, then you should still use this heading and state that the proposal does not raise any ethics issues.
- More information on ethics issues in Horizon Europe is available in:
  - **REGULATION (EU) 2021/695** - articles 18. and 19.
  - **Work Programme 2023-2025 – General Annexes** – Ethics part starts on page 14.
- More information on ethics is also available in **HE Programme guide** (from page 23)

### **4. 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).



- **For main text and tables, the minimum font size allowed is 11 points.** Standard character spacing and a minimum of single line spacing are to be used.
- Use charts, diagrams, text boxes, and figures to explain aspects of the project. Do not just use blocks of text. Don't forget to add sequential numbers and captions to the charts/diagrams/ figures/ text boxes.
- 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!
- Text elements other than the body text, such as headers, foot/end notes, captions, formulas must be legible and not be less than font size 8 points.
- **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.

## 5. Proposal template

- Use the proposal template provided, including the exact sub-headings, because:
  - It matches the evaluation template and helps you to put the right information in the right place for the evaluators to find it.
  - Evaluators use a "checklist" approach to marking – make it easy for them to find the relevant information!
- The proposal acronym must be placed in a header on each page (in both Part B1 and Part B2) in addition to already placed information: Call: - HORIZON-MSCA-2025-SE-01 – MSCA Staff Exchanges 2025.
- 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".

## 6. Page limitations

- Part B1: Sections 1, 2 and 3 together **must not be longer than 30 pages.** With the start page, the table of contents and Part B sections 1-3, part B1 must not exceed **32 pages.**
- All tables, figures, references and other elements within these sections count toward the page limit and must be included in them.
- After the deadline, excess pages (in over-long proposals) will be automatically blanked, and therefore will not be taken into consideration by the evaluators.

## 7. 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 cross reference to other parts of the proposal if necessary.
- Do not copy and paste information from other documents or websites. Instead, tailor information to fit your proposal.

## Definitions and key aspects

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

DEFINITIONS (from the proposal template)	
<b>Deliverable</b>	A report that is sent to the Commission or Agency providing information to ensure effective monitoring of the project. There are different types of deliverables (e.g., a report on specific activities or results, data management plans, ethics or security requirements).
<b>Impacts</b>	Wider long-term effects on society (including the environment), the economy and science, enabled by the outcomes of R&I investments (long term). Impacts generally occur sometime after the end of the project.
<b>Objectives</b>	The goals of the work performed within the project, in terms of its research and innovation content. This will be translated into the project's results. These may range from tackling specific research questions, demonstrating the feasibility of an innovation, sharing knowledge among stakeholders on specific issues. The nature of the objectives will depend on the type of action, and the scope of the topic.
<b>Outcomes</b>	The expected effects, over the medium term, of projects supported under a given topic. The results of a project should contribute to these outcomes, fostered in particular by the dissemination and exploitation measures. This may include the uptake, diffusion, deployment, and/or use of the project's results by direct target groups. Outcomes generally occur during or shortly after the end of the project.
<b>Pathway to impact</b>	<p>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.</p> <p>Align with expected impacts as detailed in the MSCA Work Programme. Impacts generally occur sometime after the end of the project.</p>
<b>Research output</b>	Results generated by the action to which access can be given in the form of scientific publications, data or other engineered outcomes and processes such as software, algorithms, protocols and electronic notebooks.

<b>Results</b>	What is generated during the project implementation. This may include, for example, know-how, innovative solutions, algorithms, proof of feasibility, new business models, policy recommendations, guidelines, prototypes, demonstrators, databases and datasets, trained researchers, new infrastructures, networks, etc. Most project results (inventions, scientific works, etc.) are 'Intellectual Property', which may, if appropriate, be protected by formal 'Intellectual Property Rights'.
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**ADDITIONAL DEFINITIONS and KEY ASPECTS from the EC that can be useful while preparing your Staff Exchanges project proposal**

<b>Artificial Intelligence<sup>3</sup></b>	<p>Artificial intelligence (AI) refers to systems that display intelligent behaviour by analysing their environment and taking actions – with some degree of autonomy – to achieve specific goals.</p> <p>AI-based systems can be purely software-based, acting in the virtual world (e.g., voice assistants, image analysis software, search engines, speech and face recognition systems) or AI can be embedded in hardware devices (e.g., advanced robots, autonomous cars, drones or Internet of Things applications).</p> <p><b>If you plan to make use of Artificial Intelligence in your project, the evaluators will evaluate the technical robustness of the proposed system under the appropriate criterion – (methodology aspect of the project), as such it should be considered while writing the Excellence part of the project proposal.</b></p>
<b>Guidance on the use of generative AI tools for the preparation of the proposal</b>	<p>Applicants should provide information on any use of generative AI tools for the preparation of the proposal. -</p> <p>AI definitions are available in the <u>Definition from the European Commission's High-Level Expert Group on Artificial Intelligence</u>.</p> <p><b>See also</b> <u>Living guidelines on the responsible use of generative AI in research and recommendation for researchers, research organisations and funding organisations</u>.</p> <p>When considering the use of generative artificial intelligence (AI) tools for the preparation of the proposal, it is imperative to exercise caution and careful consideration. The AI-generated content should be thoroughly reviewed and validated by the applicants to ensure its appropriateness and accuracy, as well as its compliance with intellectual property regulations. Applicants are fully responsible for the content of the proposal (even those parts produced by the AI tool) and must be transparent in disclosing which AI tools were used and how they were utilized.</p> <p>Specifically, applicants are required to:</p>

<sup>3</sup> Definition from the European Commission's High-Level Expert Group on Artificial Intelligence, [https://ec.europa.eu/futurium/en/system/files/ged/ai\\_hleg\\_definition\\_of\\_ai\\_18\\_december\\_1.pdf](https://ec.europa.eu/futurium/en/system/files/ged/ai_hleg_definition_of_ai_18_december_1.pdf)

	<ul style="list-style-type: none"> <li>• Verify the accuracy, validity, and appropriateness of the content and any citations generated by the AI tool and correct any errors or inconsistencies.</li> <li>• Provide a list of sources used to generate content and citations, including those generated by the AI tool. Double-check citations to ensure they are accurate and properly referenced.</li> <li>• Be conscious of the potential for plagiarism where the AI tool may have reproduced substantial text from other sources. Check the original sources to be sure you are not plagiarizing someone else's work.</li> </ul> <p>Acknowledge the limitations of the AI tool in the proposal preparation, including the potential for bias, errors, and gaps in knowledge.</p> <p><b>Note that you should address these points at the end of Part B2.</b></p>
<b>Associated Partners</b>	<p>Associated Partners are entities which participate in the action but without the right to directly charge costs or claim contributions. They contribute to the implementation of the action (training and/or hosting seconded staff) but do not sign the Grant Agreement.</p> <p>For the Staff Exchanges, only secondments from associated partners located in low to middle-income third countries included in the <b><u>List of Participating Countries in Horizon Europe</u></b> are eligible for funding.</p>
<b>Associated Partners linked to a beneficiary</b>	<p>Associated partners linked to a beneficiary are organisations with an established capital or legal link with the beneficiary, which is not limited to the action nor specifically created for its implementation.</p> <p>The associated partners linked to a beneficiary do not have the right to claim unit contributions. They can host and second staff in Staff Exchanges.</p> <p>For secondments from associated partners linked to a beneficiary, only the sector (academic or non-academic) of the beneficiary counts; the linked associated partners will be considered to belong to the same sector as their beneficiary.</p> <p>In addition, they must fulfil the eligibility conditions for participation and funding applicable to the beneficiary to which they are linked and must be established in the same country.</p> <p>The type of link and involvement of such entities must be clearly described in the proposal and will be assessed as part of the evaluation.</p>
<b>Interdisciplinarity</b>	<p>This means the integration of information, data, techniques, tools, perspectives, concepts or theories from two or more scientific disciplines. The term discipline refers to the first level of <b><u>MSCA keywords</u></b>.</p>
<b>Critical risk</b>	<p>A critical risk is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.</p> <p>Level of likelihood to occur (low/medium/high): The likelihood is the estimated probability that the risk will materialize even after taking account of the mitigating measures put in place.</p> <p>Level of severity (low/medium/high): the relative seriousness of the risk and the significance of its effect.</p>

<b>Consortium Agreement (CA)</b>	<p>The Consortium Agreement (CA) is a private agreement between the beneficiaries, to set out the rights and obligations amongst themselves. It does not involve the European Commission or REA.</p> <p>It sets the framework for successful project implementation and exploitation of results including intellectual property management, and is meant to settle, where possible, all issues that might hamper the smooth and seamless cooperation of the different actors for the different parts of the project.</p> <p>The members of the consortium must sign a CA.</p>
<b>Grant Agreement (GA)</b>	<p>The Grant Agreement is the legal instrument that provides for EU funding of a successful proposal. The following link outlines the process: <b><u>Grant Agreement preparation procedure</u></b> and takes precedence over any agreement that may be reached among members of the consortium.</p>
<b>MSCA Green Charter</b>	<p>The <b><u>MSCA Green Charter</u></b> is a code of good practice for individuals and institutions that receive MSCA funding. It promotes the sustainable implementation of research activities. The goal of the Green Charter is to encourage sustainable thinking in research management. This document can give you some ideas while writing your project proposal.</p> <p>The European Commission has also produced a set of <u>guidance material</u> together with the MSCA Green Charter, which can give you ideas on this subject.</p>
<b>Partnership Agreement (PA)</b>	<p>Partnership Agreements (PA) are private agreements concluded with the purpose to regulate the relationship between beneficiaries and associated partners, including the secondment period framework. Beneficiaries must be careful to conclude these agreements in compliance with their obligations laid down in the Grant Agreement and the Consortium Agreement as well.</p>
<b>Supervision</b>	<p>Applicants should ensure that a supervisor or contact person is clearly identified in order that seconded staff members can refer to them while undertaking their professional duties on secondment.</p> <p>Such arrangements should clearly define that the proposed supervisors/contact persons have the time, knowledge, experience, expertise, and commitment to be able to offer the seconded staff member appropriate support and provide for the necessary progress and review procedures, as well as the necessary feedback mechanisms.</p> <p>While the <b><u>MSCA Guidelines on Supervision</u></b> are non-binding, <b>funded-projects are strongly encouraged to take them into account.</b></p>

## START PAGE COUNT – MAX 30 PAGES

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

### 1. Excellence #@REL-EVA-RE@#

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

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

Required sub-headings:

- Introduction, objectives and overview of the research and innovation programme. Detail the research and innovation objectives. Are the objectives measurable and verifiable? Are they realistically achievable?
  - Outline the key specific research and innovation objectives of the programme. For the research and innovation objectives, bear in mind that innovation can also include social innovation. Outline how the project is multi-/inter-disciplinary, international, and intersectoral.
  - Make sure the research objectives are SMART (Specific, Measurable, Attainable, Relevant and Time-Bound). Moreover, it is important that the research objectives are feasible. For clarity present them in a bulleted list or text box, relating them to the relevant Work Packages under section 3.1.
  - Each research objective ideally should correspond to the research work packages. For example, research objective 1 is the objective for research WP 1. Number the objectives O1, O2, O3 etc. and include the corresponding work package in brackets at the end of each objective (e.g. WP1).
  - Why do you need to work together on this research? Explain why a collaborative approach is needed to solve the problem (stating the added value) and briefly why your consortium is best placed to do so. Describe the importance of the intersectoral and multi-/interdisciplinary approach and how the outcome of the network will be greater than the sum of its parts.
  - Clearly highlight the innovative aspects of the project (e.g., topic, consortium, synergies...)
- Pertinence and innovative aspects of the research programme (in light of the current state of the art and existing programmes / networks). Describe how your project goes beyond the state-of-the-art, how the overall research programme will deliver scientific breakthroughs, and the extent to which the proposed work is ambitious.
  - Expand on the state of the art to explain why the research is original, innovative and timely compared to the state of the art in the research area. Point out the timeliness and relevance of your proposal, in terms of societal need and fit to sectoral policy targets, and link to relevant EU policies as well as UN Sustainable Development Goals.
  - Describe how the research objectives address the gaps in the state-of-the-art.
  - Use footnotes to cite key and relevant sources – make sure to cite consortium members' work and show the high-level of expertise within the consortium.
  - Benchmark against other EU funded projects in the same/similar field - but do not limit your benchmarking to EU funded consortia. You can check CORDIS to see EU funded projects.

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

**Table 1 – Work Package<sup>4</sup> (WP) List**

Work Package No	Work Package Title	Activity Type (e.g., Research, Training, Management, Communication, Dissemination) <sup>5</sup>	Number of person-months involved per work package <sup>6</sup>	Lead participant	Start month	End month

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

- Break down the research programme into (typically) 3-4 discrete research Work Packages (WP) relating to the research objectives.
- Each research WP should be understood as a thematic unit. Together, all your WPs should address the overarching research goals of your project.
- Add the remaining non-research WPs (e.g. Management, Knowledge Transfer/Training, Dissemination, Exploitation & Communication).

#### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The research and innovation objectives have been very clearly defined and are detailed. They are pertinent, measurable and realistically achievable. The measures to verify them have been explained convincingly.
- The research and innovation objectives are very well specified and convincing. The specific training, dissemination and collaboration objectives are also carefully prepared and detailed, which is further clarified by providing a comprehensive breakdown of each type of objective with some level of quantification.
- The proposal shows a very good and comprehensive analysis of the state of the art and demonstrates very well that the research objectives are ambitious and well formulated, going beyond the state of the art.
- The expertise that each consortium member brings to this collaborative enterprise is well addressed. It is shown clearly how each partner will support the planned research activities, which are fully in line with the stated research objectives.
- The quality and novelty of the planned research activities are demonstrated using real case examples observed in a different context and they are relevant against the current state-of-the-art.

<sup>4</sup> A work package is defined as a major subdivision of the proposed project.

<sup>5</sup> Encode person months for R&I activities only

<sup>6</sup> The same person-month should not be declared in multiple WPs.



- The proposal conclusively demonstrates the trajectory of going beyond the state-of-the-art by introducing both new research areas and new research methods.
- The proposal clearly demonstrates that the stated objectives are realistically achievable, with a well identified starting point and a team that possesses the necessary competences and experiences.

#### **WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS**

- The proposal does not sufficiently describe how the success of the objectives will be measured and the corresponding KPIs.
- The proposed goals and the related work seem overambitious regarding the many different methods and materials.
- The research and innovation objectives are not sufficiently explained and lack details, both on the scientific content as well as on the technical challenges to be addressed during the development of activities. Some scientific objectives are not sufficiently focused to be credibly achievable within the time frame of the proposed research.
- The description of the state-of-the-art is outdated and not adequately presented, and the innovative aspects of the research are not convincingly demonstrated.
- The research objectives are not sufficiently well explained, and the proposed research lacks the necessary focus. There is an expectation of several refereed publications, but since there are no specific goals, these will likely not bring significant new discoveries.

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

Required sub-headings:

- Overall methodology: Describe and explain the overall methodology including the concepts, models and assumptions that underpin your work. Explain how this will enable you to deliver your project's objectives. Refer to any important challenges you may have identified in the chosen methodology and how you intend to overcome them.
- Explain how you will deliver on your project's objectives (concepts, models, equipment, techniques, assays, types of research etc.).
- You need to show what is innovative about your particular approach, and how it can be achieved through secondment of staff (and subsequent reintegration in their own organisation).
- Have in mind the diversity of the project partners (including non-academic partners), their expertise and the infrastructure available.
- Briefly explain any key challenges in your chosen methodology and how you plan to address them, providing enough detail for the evaluator to understand your approach.
- Integration of methods and disciplines to pursue the objectives: Explain how expertise and methods from different disciplines will be brought together and integrated in pursuit of your objectives. If you consider that an interdisciplinary approach is unnecessary in the context of the proposed work, please provide a justification.
- Explain the added value of both the interdisciplinary approach in terms of addressing your research objectives and to the transfer of interdisciplinary knowledge during the reintegration phase of



- seconded staff. Interdisciplinarity should be addressed in the strategies, concepts, approaches, methodologies, technologies as well as in the training programmes.
- Ask yourself why this consortium is the best team to address these research objectives from a cohesive, interdisciplinary, and intersectoral point of view. Highlight the role of each consortium member in the research programme. You can use a chart or a pictogram to illustrate connection between research objectives/methodologies/resources needed.
  - Examples of what constitutes an interdisciplinary secondment are available in a REA FAQ.
    - *Same-sector secondments (that meet the interdisciplinary conditions) in EU Member States and Horizon Europe Associated Countries (MS/AC) are eligible for funding for up to 1/3 of the project total eligible person-months funded by the EU.*
    - *Secondments are considered as Interdisciplinary if the activities performed during the secondment integrate aspects (information, data, techniques, tools, perspectives, concepts or theories) from two or more different scientific disciplines. In assessing the interdisciplinary dimension of proposals, expert evaluators will consider the descriptors (keywords) available in part A of the proposal form making reference, in principle, to the **first level of MSCA keywords**. You may refer to a few examples in our [FAQ](#).*
  - A [list](#) of MSCA keywords is provided by REA:
  - It is important to make sure secondments are planned according to the secondment rules:
  - Secondments within EU Member States or Horizon Europe Associated Countries must be between different sectors (academic and non-academic), except for interdisciplinary secondments, which must be limited to a maximum of one third of the total months spent under the action.
  - Secondments from 'Associated Partners' (no matter where they come from, EU MS, HE AC or Third Countries) are not eligible for funding. An exception is valid for low to middle-income Third Countries listed in the Horizon Europe Programme Guide; these are eligible to receive funding for seconding a staff member to an EU MS and HE AC institution.
  - Gender dimension and other diversity aspects: Describe how the gender dimension and other diversity aspects are taken into account in the project's research and innovation content. If you do not consider such a gender dimension to be relevant in your project, please provide a justification.
    - *Remember that this question relates to the content of the planned research and innovation activities, and not to gender balance in the teams in charge of carrying out the project.*
    - *Where applicable, gender aspects in research activities where human beings are involved as subjects or end-users, gender differences may exist. In these cases, the gender dimension in the research content has to be addressed adequately.*
    - *Sex, gender and diversity analysis refers to biological characteristics and social/cultural factors respectively. For guidance on methods of sex / gender analysis and the issues to be taken into account, please refer to [Gender equality in research and innovation / European Commission \(europa.eu\)](#). For further information, you can refer to the "[gendered innovation](#)" [project page](#) on Europa website, where a report with methodology and tools on integration of gender dimension in research content is available.*
  - In other words, you should take into account biological characteristics (sex), social/cultural features (gender), and other diversity aspects in your research. You are encouraged to use gender inclusive

- language and not to think about gender in binary categories, as sexual orientation and gender identity are important.
- Ask yourself the following questions:
    - Are sex/gender norms embedded in the concepts, theories and models used by your research field? If so, how do these gender norms/assumptions influence the research area?
    - How do gender and interconnected social categorizations, such as race, class etc. shape your research question and desired outcomes?
    - Does the chosen methodology(ies) ensure that sex/gender, and other connected social characterizations, are considered and investigated?
    - Does the methodology ensure that (possible) gender differences will be investigated: that sex/gender differentiated data will be collected and analysed throughout the research cycle? Are questionnaires, surveys, focus groups, etc. designed to unravel potentially relevant sex and/or gender differences in your data? Are the groups involved in the project (e.g., samples, testing groups) gender-balanced?
    - Have you explained the project's approach to gender and intersectionality throughout the research life cycle?
    - Have you explained how including sex and gender findings will increase the quality of the research and enhance the impact and relevance of the results?
  - The MSCA-NET Policy Brief on Gender provides an overview of the gender equality requirements under MSCA, guidance on the evaluation criteria, and how to approach the gender dimension of research when developing your proposal.
  - Note that, in addition to describing the gender and diversity aspects in the research, it is also possible to address the gender dimension through training and secondments (in section 1.3) and communication/dissemination activities (in section 2.3).
  - Apart from gender dimension in research, if applicable, include other diversity aspects to better address the multiple and interacting factors of inequality experienced by R&I actors, such as other social categories and identities: e.g.; ethnicity and race (including migrants and refugees), social class and wealth, human physical parameters (size, weight), gender identity, sexual orientation, LGBTI+ issues, disability and age.
  - A gender dimension may apply to research involving the use of animals too. If this applies to your research programme, you must briefly explain how you have taken sex/gender into account in the research methodology, e.g., using animal models of both sexes, and separation of research subjects into male and female groups.
  - Some examples of the gender dimension in different research areas can be found at <https://genderedinnovations.stanford.edu/what-is-gendered-innovations.html>
  - More questions on the gender aspect in research are available on the Yellow window Checklist for Gender in Research.
  - The European Commission produced a video on Understanding the Gender Dimension for MSCA projects.
  - The European Commission has published a Toolkit on Gender in EU-funded research.
  - The Horizon Europe Programme Guide is a good source of information and contains links to further sources, including examples (chapter 9).
  - If your research is not concerned with gender issues or other diversity aspects, you should clearly explain why and provide a strong justification.

- **Open science practices:** Describe how appropriate open science practices are implemented as an integral part of the proposed methodology. Show how the choice of practices and their implementation are adapted to the nature of your work, in a way that will increase the chances of the project delivering on its objectives. If you believe that none of these practices is appropriate for your project, please provide a justification here.

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

- *Please note that this question does not refer to outreach actions that may be planned as part of communication, dissemination and exploitation activities. These aspects should instead be described below under ‘Impact’*
- You must provide concrete information on how you plan to comply with mandatory, and when relevant, recommended open science practices<sup>7</sup> at consortium and beneficiary levels.
- In section 3, while describing the consortium as a whole, you can point out that the involved organisations apply open science strategies, especially if they implement some specific strategies.

Mandatory OS practice
<ul style="list-style-type: none"> <li>• open access to scientific publications under the conditions required by the Grant Agreement;</li> <li>• responsible management of research data in line with the FAIR principles of ‘findability’, ‘accessibility’, ‘interoperability’ and ‘reusability’;</li> <li>• information about the research outputs/tools/instruments needed to validate the conclusions of scientific publications or to validate/re-use research data;</li> <li>• digital or physical access to the results needed to validate the conclusions of scientific publications, unless exceptions apply;</li> <li>• in cases of public emergency, if requested by the granting authority, immediate open access to all research outputs under open licenses or access under fair and reasonable conditions to legal entities that need the research outputs to address the public emergency.</li> </ul>
Recommended OS practice
<ul style="list-style-type: none"> <li>• Open Science practices beyond the mandatory ones, such as involving all relevant knowledge actors, including citizens, early and open sharing of research, output management beyond research data, open peer-review, pre-registration of research, (i.e. specifying your research plan in advance of your research and submitting it to a registry).</li> </ul>

- Show how OS implementation is adapted to the nature of your work and methodology, increasing the likelihood of the project delivering on its objectives.
- You can demonstrate the link between OS, communication, dissemination, and exploitation; using the right licenses to comply with the OS requirements and exploitation.

<sup>7</sup> For more information on how to address Open Science in project proposal, you can consult [OpenAIRE Guides for Researchers Open Science in Horizon Europe proposal](#).

In addressing OS practice take into account:

Open Science Practice		Mandatory	Recommended
Early and open sharing of research	<ul style="list-style-type: none"> <li>Preregistration, registered reports, preprints, etc.</li> </ul>		Yes
Research output management	<ul style="list-style-type: none"> <li>Data management plan (DMP)</li> </ul>	Yes	
Ensure reproducibility of research outputs	<ul style="list-style-type: none"> <li>Information on outputs/tools/instruments and access to data/results for validation of publications</li> </ul>	Yes	
Open access to research outputs through deposition in trusted repositories	<ul style="list-style-type: none"> <li>Open access to publications</li> <li>Open access to data</li> <li>Open access to software, models, algorithms, workflows etc.</li> </ul>	Yes, for peer-reviewed publications and research data ('as open as possible as closed as necessary')	Yes, for other research outputs.
Participate in open peer-review	<ul style="list-style-type: none"> <li>Publish in open peer-reviewed journals or platforms</li> </ul>		Yes
Involving all relevant knowledge actors	<ul style="list-style-type: none"> <li>Involve citizens, civil society, and end-users in co-creation of content (e.g., crowd-sourcing, etc.)</li> </ul>		Yes

Source: [MSCA-NET Policy brief: Open Science](#)

- The Policy Brief provides an overview of the open science and data management requirements under MSCA, and provides additional information on approaching the evaluation criteria, training and skills development, dissemination, communication, and exploitation.
- 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.
- Open Access (OA) should be "as open as possible and as closed as necessary", remaining "open" in order to foster accessibility, reusability, and accelerate research, but at the same time information should be "closed" to safeguard the privacy of the subjects (protection of the private data), protecting results that can reasonably be expected to be commercially or industrially exploited, keeping confidentiality in connection with security issues.
- As a general rule, Open Access (OA) to other research outputs such as software, models, algorithms, workflows, protocols, simulations, electronic notebooks, and others is not required but strongly recommended. Access to 'physical' results like cell lines, biospecimens, compounds, materials, etc., is also strongly encouraged.
- It is recommended that you provide OA to research outputs beyond publications and data (software tools, models, apps, etc.) and share them as early and openly as possible – providing guidance for potentially interested users.
- A clear explanation of how the consortium will adopt recommended practices, as appropriate for projects, will result in a higher evaluation score.
- A strong justification is needed in case you believe that none of these practices are appropriate for your project.

- **Research data management and management of other research outputs:** Applicants generating/collecting data and/or other research outputs (except for publications) during the project must provide a description (maximum one page) on how the data will be managed in line with

the FAIR principles (Findable, Accessible, Interoperable, Reusable), addressing the following (the description should be specific to your project):

- 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.
  - If you expect to generate or re-use data and/or other research outputs (except for publications), you are required to outline (including OS practices) how these will be managed.
  - 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.
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- 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.
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- You must explain how the project will respect the FAIR principles (do not just indicate that the results will be findable, accessible, interoperable and reusable, provide details).
  - If using the European Open Science Cloud (EOSC) federated repositories, you should explicitly discuss their use in the proposal.
  - Show best practice in RDM – including provisions required to be in place to ensure that data is managed responsibly (e.g., the right location is chosen for deposition, legal provisions such as general data protection regulation (GDPR) are respected, etc.).
  - FAIR data is not equivalent to open data (publicly available to everyone to access and reuse). Data can and should be FAIR, even when access is restricted.
  - More details should be provided in a data management plan (DMP), which is not required at submission stage, but it is a mandatory deliverable during the implementation phase. Explain in the proposal that further details will be provided in the DMP.
  - The Horizon Europe Programme Guide is a good source of information and contains links to further sources, including examples on Open Science practices and research data management (chapter 16).

*Proposals selected for funding under Horizon Europe will need to develop a detailed data management plan (DMP) for making their data findable, accessible, interoperable and reusable (FAIR) as a deliverable at mid-term and revised towards the end of a project's lifetime.*

*For guidance on open science practices and research data management, please refer to the relevant section of the [Horizon Europe Programme Guide](#) on the [Funding & Tenders Portal](#).*

- Artificial Intelligence (if applicable to the proposal): If the activities proposed involve the use and/or development of AI-based systems and/or techniques, applicants must provide explanations on the technical robustness of the proposed system(s).

⚠️ *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 risks they pose*
- *socially robust, in that they duly consider the context and environment in which they operate*
- *reliable and function as intended, minimizing unintentional and unexpected harm, preventing unacceptable harm and safeguarding the physical and mental integrity of humans*
- *able to provide a suitable explanation of their decision-making processes, whenever they can have a significant impact on people's lives.*

- Have in mind the definition of Artificial Intelligence at the beginning of the Handbook.
- More information is available in:
  - The Guidelines on Ethics by Design/operational use for Artificial Intelligence
  - The living guidelines on the responsible use of generative AI in research.
  - Policy Brief on AI
- If your project does not involve AI, you can ignore this section.

#### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The methodology to achieve the objectives, and the reasoning behind it, are clearly explained, and well supported with information about the required steps in the process.
- Overall the methodology is proposed with coherent content and objectives for each of the individual WPs.
- Overall and for the majority of aspects, the proposed methodology is sound and highly interdisciplinary, providing credible justifications on how expertise and methods from various disciplines will be brought together in a holistic and integrated way.
- Gender issues are well addressed, justified, and thoroughly integrated into the research theme and methodology, including the data collection and dissemination.
- The open science practices and data management plan are credibly presented. Alignment with FAIR principles is convincingly outlined. Making code and methods publicly available is important for enabling reproducibility.
- Open science practices are well integrated into the research methodology and include journal and conference publications primarily based on open review methods, various openly accessible pre-print portals, and open-source repositories for released software applications.
- The mandatory open science practices are well-adapted to the planned work, mentioning for instance Gold/Green open-access and repositories.
- AI will be used with the help of XAI (Explainable Artificial Intelligence) methodologies. The contribution of these techniques is indispensable for the development of the proposed research and the choice is well thought out and supported by specific skills and responsible use.



### WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The overall methodology is not presented with sufficient details to convince that the R&I objectives can be delivered, and methodological challenges are not appropriately discussed along with solutions to overcome them.
- The methodology described in the proposal lacks specific details about the materials that will be used, the methods of their preparation, and the ways in which the experimental and modeling techniques will be employed. Furthermore, the emergent methodological challenges are not well identified.
- The various elements of the methodology appear disjointed and not well justified in why they should be part of an integrated project.
- The proposal does not adequately identify the methodological challenges and related possible solutions. Indeed, the degree to which cultural and socio-economic issues (age, gender, origin, racialization, and disability) may impact the methodology to be adopted is a relevant challenge given the wide geographical range of participating countries not sufficiently considered.
- The interdisciplinary character of the methodology is not convincingly demonstrated: in particular, it is not clear how methods from different disciplines will be brought together and integrated to pursue the mentioned objective. More details on the contents of the "transnational and cross-sectoral multidisciplinary secondments" are needed to demonstrate the effectiveness of the integration of methods and skills. Furthermore, the proposal weakly refers to the possible methodological challenges that may occur during the secondments.
- The gender and diversity aspects are not directly relevant to the content of the planned R&I objectives but this is not acknowledged nor justified in the proposal; the description of the gender aspects is instead limited to research/academic careers.
- Open science practices are insufficiently integrated into the methodology and are insufficiently elaborated in relation to the specific work. The methodology does not sufficiently detail the use of artificial intelligence and machine learning, nor where/how the consortium will collect the data that will be used.
- The use of AI is insufficiently substantiated and elaborated, and it cannot easily be identified in the work plan, thus, the proposal does not sufficiently demonstrate the robustness of the AI system they plan to use. This raises doubts as to whether the methodology will allow the delivery of the project's objectives.

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

Required sub-headings:

- Contribution of each participating organisation in the activities planned, with particular emphasis on the scientific objectives described in section 1.1.
  - Clearly state what each participating organisation will contribute towards achieving the research and knowledge transfer objectives – you can use a table for brevity and clarity. Clearly present and describe each of the participant's expertise, capabilities and competencies, and their role/involvement in the scientific activities proposed to achieve the project objectives.
  - In terms of the partners' expertise, describe how their contribution is essential to the networking events and show their level of participation in the secondments. There should be an explicit link between networking activities and specific objectives of the project.
  - Include details on how many secondments are planned for the project and how many person months this corresponds to in total.

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

#### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The proposal clearly describes the contributions of each participating organization to the planned scientific activities and highlights the complementary nature of the expertise within the consortium. Each partner's expertise and role are well aligned with the project's objectives.
- The proposal clearly outlines the areas of competence of the partners that form an interdisciplinary set of skills and knowledge. The expertise of different academic and non-academic partners will be well integrated by working together in research streams and teams, consortium-wide meetings, and inviting external experts to conferences and workshops, thus bringing in additional knowledge.
- Each partner's contribution to the project and their expertise and involvement in the scientific activities are convincingly presented. Particularly the diagrams showing the interactions between work packages and the secondment periods between participants are clear and informative.
- The main networking activities are well justified and include various effective measures (e.g., workshops, meetings, lectures, presentations) to foster the inter- and intra-sectorial transfer of knowledge, and strengthen interactions between partners.
- The networking activities for the transfer of knowledge among the participants are credible and suitable, and include concrete actions and appropriate networkwide events such as secondments, workshops, lectures, technical demonstrations etc.
- The expertise that each consortium member brings to this collaborative enterprise is well addressed. It is shown clearly how each partner will support the planned research activities, which are fully in line with the stated research objectives.
- The proposal shows very well how intersectoral collaboration will be achieved through secondments and networking events. The expertise of each partner and associated partner is well covered in the proposal and can be considered interdisciplinary.

#### WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The approach ensuring knowledge sharing between participants is not explained with the necessary level of detail and activities devoted to knowledge transfer are not clearly described.
- The proposal does not appropriately explain how the participating organisations contribute to the scientific activities. The networking activities are only briefly mentioned.
- The interaction between the partners and the description of main networking activities lacks essential details concerning the specific contribution of each partner and sharing of activities between them.
- The interactions between participating organisations, particularly between academic and non-academic beneficiaries, and for staff exchanges, are insufficiently elaborated. Specifically, networking activities, including the workshops and thematic schools, are not sufficiently detailed in relation to individual contributions.



- The contributions of the participating organisations are described in terms of their core expertise and involvement in the proposed activities. However, for each participating organisation, their individual contributions are not consistently detailed in the proposal. The structure of the outlined networking activities is clearly organised with respect to the duration of the proposal, and for the purpose of knowledge transfer. However, some of the planned activities are only broadly described.
- The interdisciplinarity in the research and training programme is less convincingly presented with regard to the integration between the disciplines involved.
- It is not sufficiently described how the secondments contribute to the achievement of the objectives.
- The main network activities are limited to external activities not organised by the consortium and their rationale have not been sufficiently presented.

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

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

Required sub-headings:

- Describe the development and sustainability of new and lasting research collaborations resulting from international, interdisciplinary and/or inter-sectoral secondments and the networking activities implemented.
  - Explain how the secondments and networking activities and the knowledge-transfer achieved via those mechanisms will help to develop a lasting collaboration between the participants e.g. will training programmes continue after the end of the project?
  - Outline your plans for building the collaboration and continuing it after the project has ended (e.g., future research activities, collaborative trainings/online lectures, knowledge transfer, bilateral or multilateral agreements, potential new collaborative projects under MSCA, COST, Erasmus+, the European Institute of Innovation and Technology (EIT) ...).
  - The MSCA-NET Policy Brief on Synergies provides an overview of the MSCA synergies with other Union programmes, as well as tips on how MSCA projects can benefit from synergies.
- Describe how the project will generate knowledge transfer that will benefit the participating organisations.
  - Describe the overall strategy for knowledge-sharing and provide an explanation of the secondment programme and networking events.
  - Description of secondments should include:
    - how the secondments will contribute to the knowledge sharing objectives,
    - what knowledge will be gained,
    - who is the knowledge provider and recipient.
    - how will transfer of knowledge be achieved (also to the home organisation during the reintegration phase).
  - Make sure that both doctoral students and postdocs are doing secondments (longer visits >4 months for young researchers have bigger impact).
  - Remember that this is the impact section so focus on the impact of the knowledge transfer and how the participating organisations will benefit from it.

- Describe the contribution of the action to the improvement of the research and innovation potential within Europe and/or worldwide.
- Explain how the research programme and the staff's activities will contribute to strengthening Europe's capacity for research and innovation from a human capital perspective (in section 2.4 you can provide more details on economic and social impact). Make a link to relevant EU research / policy goals.
- Show the importance of the research in addressing a challenge/priority at a European/Global level:
  - European Green Deal
  - EU missions under Horizon Europe
  - UN Sustainable Development Goals
- Describe the impact of the triple-I dimension (international, interdisciplinary and intersectoral collaboration) on strengthening the research and innovation potential within Europe.

#### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The proposal credibly addresses a strategy that will support lasting research collaborations. Existing collaborations and new opportunities for partnerships among the partners are well explained. The interaction with non-EU partners will promote research and innovation worldwide.
- The project will enable the development of the new and lasting research collaborations through a series of activities which include staff exchanges, knowledge transfer and the involvement of other entities outside the consortia.
- The proposal shows a good plan of action that will result in knowledge transfer between organizations, including event details, scope and delivery plans, locations, and a Work Package shared for all partners. Academic partners will also benefit from new training course development.
- The proposal provides credible contributions to knowledge transfer between participating organizations, including well-prepared tasks for knowledge exchange within the consortium at institutional level and among individual researchers, as well as for the transfer of knowledge and research outputs to industry.
- The knowledge transfer strategy is well designed to ensure that the new knowledge and skills acquired by secondees are not only shared with their home institution upon their return but are also effectively integrated into the production of relevant research outputs.
- The knowledge transfer is well described. It is considered both at the collective level (training, webinars, workshops) and individual level, including soft and technical skills, with a strong contribution from industrial partners.
- The proposed strategy for knowledge transfer among the project partners is very well identified. This includes a plan of PhD, Postdoc and Senior Researcher secondments. The knowledge transfer is particularly relevant for junior researchers (especially from non-EU countries) who will gain international experience and individual training at the beginning of each secondment. Senior researchers will offer master classes in their host institutions.
- The project presents a good balance between enhancing previous collaborations and building new collaborations, both in developing new theoretical approaches and combining theory with experiments. Furthermore, the planned model of secondments allows sustainable growth of the network and lasting collaborations.
- The consortium affirmed credibly that collaboration on shared research and innovative solutions achieved inside by the secondments would lead to forming knowledge transfer across various disciplines and industries.

- The proposal sufficiently shows that the project has the potential to improve R&I in Europe and worldwide, from the mix of consortium partners, by jointly continuing to participate in national and international grants.
- The potential to transform research and educational programmes across the European Higher Education Area is clearly demonstrated.

#### **WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS**

- The proposed plans for sustaining the new partners that will join the consortium in long term collaborations beyond the end of the project, especially between sectors, is not convincingly described. The description of how the development of local networks of collaborations with industry will contribute to the proposal is not sufficiently detailed.
- The knowledge sharing during the secondments and the distribution of the knowledge and skills between the partners have not been sufficiently described. It is not clear how the TC partners will benefit from the knowledge transfer, as no secondments are planned to the European partners (except for one TC partner).
- The proposal does not describe convincingly how the project will generate knowledge transfer among participating organizations besides the individual level.
- The proposal does not clearly demonstrate how an effective knowledge transfer between participants will be achieved. Furthermore, it is unclear how knowledge transfer from seconded personnel back into their home research teams will be accomplished.
- There is insufficient explicit detail to show the ways in which the consortium partners themselves are to gain institutional benefit from the knowledge transfer or the secondments undertaken. There is too little emphasis on the way that the knowledge generated will impact on the current scientific activities of the partners, and insufficient justification whether they lack and this knowledge and how it will be useful to them.
- The inter-sectorial and intra-sectorial transfer of knowledge is not well defined and it is unclear as to how the knowledge transfer will directly contribute to achieving the aims of the R&I activities.
- It is unclear how the proposal will increase synergies around the world, outside and inside Europe since there is very limited information about the current level of expertise in the proposal topics within the EU and this project lacks stronger ties with the non-academic sector.
- The contribution to improving the European innovation potential is not convincingly specified and makes very limited reference to the project. It adds no value or depth to the proposal. Mentioning several priorities of Horizon Europe does not sufficiently highlight the project-specific aspects. Global scale vision is not explained in sufficient detail.

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

Required sub-headings:

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

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

#### **STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS**

- The proposal provides a detailed explanation of how it will impact the development of knowledge, transferable skills, and career opportunities for researchers through secondments in both academic and non-academic sectors, various training programs, and various networking activities.
- There is a very extensive and clear analysis of the impact the proposed project, particularly the academic secondments, will have on participating researchers' skills and employability. More specifically, the potential benefits of networking activities, interdisciplinary collaborations and the well-planned training activities, are very well described in the proposal.
- The project describes in depth the skills and knowledge that all involved partners will acquire during its development, including cooperation between the more experienced researchers and junior members of staff. The staff will acquire new skills, experience and expertise in working across different disciplines, with different stakeholder groups and cross-culturally which will enhance their career prospects.
- The proposal offers a credible assessment of how the project will help the participating individuals to acquire new skills and develop their potential. There is a convincing description of the positive effect on their work at various levels reflected in each secondment design. The combination of skills and geographic exchange, including between junior and senior staff members as well as academic and non-academic ones, together with the relevance of the objectives and potential high scientific impact of the project outcomes, will guarantee that knowledge production and career perspectives are significantly enhanced.
- A very detailed account is provided to show how the career profile of seconded researchers is to be enhanced by their participation. A comprehensive listing of skills in respect of academic and non-academic attributes has been provided, with links to the ways that these might contribute positively to career-progression of the target group.
- The proposal provides convincing details on the new transferable skills the participating researchers will acquire, by incorporating them into primary roles in project management and reporting, while also encouraging them to seek independent funding to facilitate their career progression.
- The measures for the career development of the participating European researchers are very well planned. The technical staff's involvement and specific learning aspects are an excellent addition to this plan.
- The workshops and events arranged during the project will enable the researchers to widen their network and improve communication skills, which will have a positive impact on their careers.
- The potential impact of the project on the researchers' career perspective is well described. The early-stage researchers will have access to very good scientific and soft skills training. The project will enhance their employability both in the public and private sectors.

### WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The measures that will be taken to enhance the career perspectives of staff members are not described in a sufficiently specific way. For example, details about attracting, retaining and motivating good scientists interested in entrepreneurial aspects or new professional career opportunities are not clearly provided. Also, the exchange of fully transferrable skills to other disciplines is not sufficiently described.
- The proposal does not provide sufficient details on long-term career development strategies, such as mentorship programs or structured follow-up plans to track individual progress.
- The proposal insufficiently addresses the specific ways to increase the employability of first-stage researchers and of developing career perspectives for the senior staff.
- One month long ESR secondments are deemed too short to create an impact in terms of providing new skills and career perspectives.
- The proposal does not include adequate training for seconded early-stage researchers to help them develop soft skills.
- The proposal does not provide exact information on what skills and knowledge the participating individuals will acquire during the project implementation.

### 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 #@COM-DIS-VIS-CDV@#

Required sub-headings:

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

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

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

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

- Where relevant, remember that the results can and should be widely disseminated AFTER intellectual property protection has taken place (for the open science requirements you can refer back to 1.2. section).
- Mention, where relevant, applicability and commercialisation of the research results (e.g., new product/service, new techniques/methods), possible patents.
- If not applicable directly, indicate the likelihood of how applicable your results may be in the long-term (basic or fundamental research is seldom applicable immediately).
- Show that you understand the potential barriers to exploitation of your results. Just briefly describe the main ones and how will you tackle them. You can provide a more detailed description within the plan for the dissemination, exploitation and communication (which is a mandatory deliverable during the implementation phase).
- Possible obstacles may include: inadequate financing, skills shortages, IPR issues, regulation that hinders innovation, mismatch between market needs and the solution, etc.
- If the results are useful to policymakers/the wider society:
  - Outline what activities you will engage in to ensure that relevant policymakers/societal actors (community or voluntary sector) etc. will be informed about the research results. For example, could you organise a special workshop or information event? For health-related projects, it is advisable to include patient groups in your plans.
  - Some examples are provided in the JRC document 10 Tips for Researchers: How to achieve impact on policy.
- For additional support in dissemination, exploitation for the results and communication activities, you can advise researchers to consider using EC platforms such as:
  - Open Research Europe for rapid and transparent publishing.
  - Horizon Results Platform: a repository of 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.
  - HS Booster – standardisation support for research and innovation projects (Horizon 2020, Horizon Europe and Digital Europe projects)<sup>8</sup>.
- **Communication** and public engagement activities aim to raise citizens' awareness of the challenges addressed by the project, and to show the impact of the research on citizens' daily lives. Communication is one-way from sender to receiver, e.g., an article in a newspaper or on TV or radio or via social media, project website etc.

<sup>8</sup> The **HS Booster** initiative offers expert services to European projects, helping to increase and valorize results by contributing to the creation or revision of standards. It provides practical guidance for assessing project readiness and connecting with standardization experts. Additionally, the HS Booster includes a training academy with a diverse range of courses and online sessions.

- Describe the activities which the consortium will perform to ensure media coverage about the programme and its results, e.g., press releases to newspapers, feature articles in magazines, articles on social media. Is there any potential to have the programme featured on local/national TV or radio in any of the countries in the consortium?
- If applicable, explain who will help you with maximising media coverage, e.g., Communications or Marketing Office/Officer or Impact Officer at the institution.
- **Public engagement and Outreach activities** aim to engage a broad audience and/or is two-way from sender to receiver, and aims to bring knowledge and expertise on a particular topic to the general public.
- Describe what activities the consortium will perform to engage the general public. If you will second young researchers, have in mind that they should be actively involved in public engagement and communication activities, as a part of communication training/development.
- Plan a range of face-to-face activities (e.g., school visits, lab open days, public talks, science festivals, European Researchers' Night, Researchers at Schools) targeted at multiple audiences.
- Talk to experts at your institution. See what local/national activities you can join. Activities need to take place across the whole consortium, so ask your consortium participants for information on what activities they have in their organisation/region/country.
- If applicable, explain who will help you with public engagement activities e.g., Education/Outreach/Impact Officer at the institution.
- Communication and public engagement activities concern not only the project results, but your project as a whole and your research area. These activities should take place throughout the project duration.
- **Include quantifiable targets for measuring the effectiveness of dissemination, exploitation, communication and public engagement activities.** For this you could use a table as shown below.

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

- Don't forget to indicate these activities in the related work packages in the Implementation section.
- *In case your proposal is selected for funding, a more detailed plan will need to be provided as a mandatory project deliverable submitted at mid-term stage with an update towards the end of the project.*
- **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.
- Before submitting your proposal and while forming a consortium you should already pay attention to eventual and expected results (Intellectual Property), ownership issues and the associated intellectual property rights (IPR) with a view to disseminating and exploiting the results efficiently. You should set out these rules in the consortium agreement.
- Having a consortium agreement with a clear set of procedures, IPR management and ownership rights between the consortium members can maximise the exploitation potential of the project's results.



- Good practice is to have an Intellectual Property Committee (beneficiaries and associated partner representatives – especially if the non-academic sector is included) whose role can be to provide internal approval of planned dissemination/exploitation activities, licensing agreements and deciding on IP protection activities.
- Have in mind the specifics of the MSCA<sup>9</sup> 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 explanation of complementary competences of the participants (host organisation and secondment host organisation) – granting access to background/results for/by secondees (“visitors”).
- 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.
- Comply with the 'MSCA rules' for IP as detailed in the Grant Agreement (Article 16).
  - *If your project is selected, you will need an appropriate consortium agreement to manage (amongst other things) the ownership and access to key knowledge (IPR, research data, etc.). Where relevant, these will allow you, collectively and individually, to pursue market opportunities arising from the project.*
  - *All measures should be proportionate to the scale of the project, and should contain concrete actions to be implemented both during and after the end of the project, e.g., standardisation activities. Your plan should give due consideration to the possible follow-up of your project, once it is finished. In the justification, explain why each measure chosen is best suited to reach the target group addressed. Where relevant, describe the measures for a plausible path to commercialise the innovations.*
  - *Concrete plans for sections 2.3 must be included in the corresponding implementation tables.*
  - *Note that the following sections of the European Charter for Researchers refer specifically to public engagement and dissemination:*

## Dissemination, Exploitation of Results

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

<sup>9</sup> For additional information on IPR, you can consult EU IP Helpdesk materials:

- **Your Guide to Intellectual Property Management in Horizon Europe**
- **IPR FAQ on MSCA**
- **Recording of EU - Webinar: IP in EU funded projects with a special focus on MSCA** (register for free to access).



## Public engagement

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

- You can also refer to the Communicating EU research and innovation guidance for project participants as well as to the "communication" section of the Online Manual.

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### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- Measures to maximise the impact of the project are convincingly described, involving broad communication and engagement with relevant stakeholders, including industry partners, which is an important route towards technology exploitation and commercialisation.
- The dissemination and communication plans of the project are very ambitious, specific target audiences are clearly identified, along with dissemination tools and approach to reach them. The outputs in terms of expected impact are described in detail and extremely ambitious. Exploitation of project results is credibly addressed in the proposal, with particular emphasis on strong engagement with various stakeholders. With its very thorough dissemination strategy, and coordinated communication activities, the project can be expected to produce a truly large impact in academia, and policy circles.
- The exploitation plan to maximise the potential impact of the project to involve museums, art dealers, auction houses, insurance companies and private collectors is interesting and it will be effective.
- Several types of dissemination and communication actions for well-defined target audience are planned (including various social media, webinars, press releases, webpage, conferences etc.). The key performance indicators for each activity are precisely specified.
- The dissemination plan is of good quality and includes demonstrably effective activities (e.g. journal and conference publications, summer schools, festivals, and workshops) for promoting results and achievements to a broader audience.
- The dissemination strategy is well described and structured, outlining scientific publications, open-access commitments, and engagement with academic, industrial, and public stakeholders.
- The dissemination and communication activities are appropriately planned. The exploitation plan is well elaborated for this phase of the project. It includes the identification of the exploitable results and corresponding target groups, the leading partners, and the adoption of dual licenses to ensure that a part of the developed tools can be made available open-source and more advanced solutions can be licensed in proprietary formats.
- A number of communication activities to stakeholders are foreseen, including conventional media as well as social media and other outreach activities.
- An exploitation strategy for all commercial project results has been considered, including the potential for economic growth through spin-out and job creation.
- Possible exploitation of results is properly considered and IP issues adequately addressed. Consortium's partners are experienced with IP and all team members will receive training on how to identify, record and protect IP.
- The intellectual property strategy is comprehensive and well-developed, including embargo periods for commercialization purposes and suitable measures for the protection, accessibility, and exploitation of results.

## WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The proposal does not appropriately consider the exploitation strategy, particularly in terms of possible exploitation paths, exploitable results, as well as the potential customers and targeted end-users.
- The first plan for the dissemination, communication and exploitation of the outcomes is too generically written, with insufficiently detailed metrics and objectives. The strategy for the protection of intellectual property rights is not properly elaborated. For instance, credible measures for the exploitation of the outcomes (e.g., patents) are not precisely considered.
- The number of planned scientific publications is unrealistically large. Each seconded researcher would be required to publish at least one paper after a short stay. Joint publications are not adequately considered and thus the affiliation of all publications to the project is not sufficiently justified.
- The result exploitation plans lack a description of how the potential beneficiaries, such as SMEs and other industry sectors, will be involved in realizing the potential applications. This aspect is especially important as no intersectoral mobility is planned.
- The key performance indicators to monitor the impact of the dissemination and exploitation measures are not sufficiently clear.
- The IP strategy description is kept very generic, and it does not specify which patentable technologies will emerge from the project.
- The methodology for assessing the impact and outreach of the proposed communication activities is not clearly discussed in the proposal. For instance, it is not clear which KPIs will be used to evaluate the communication activities.
- The communication strategy lacks some details on the target audience for various channels of communication.
- The timeline of the dissemination and communications activities and the number of publications or conference proceedings that will be produced during the project have not been indicated in sufficient detail.

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

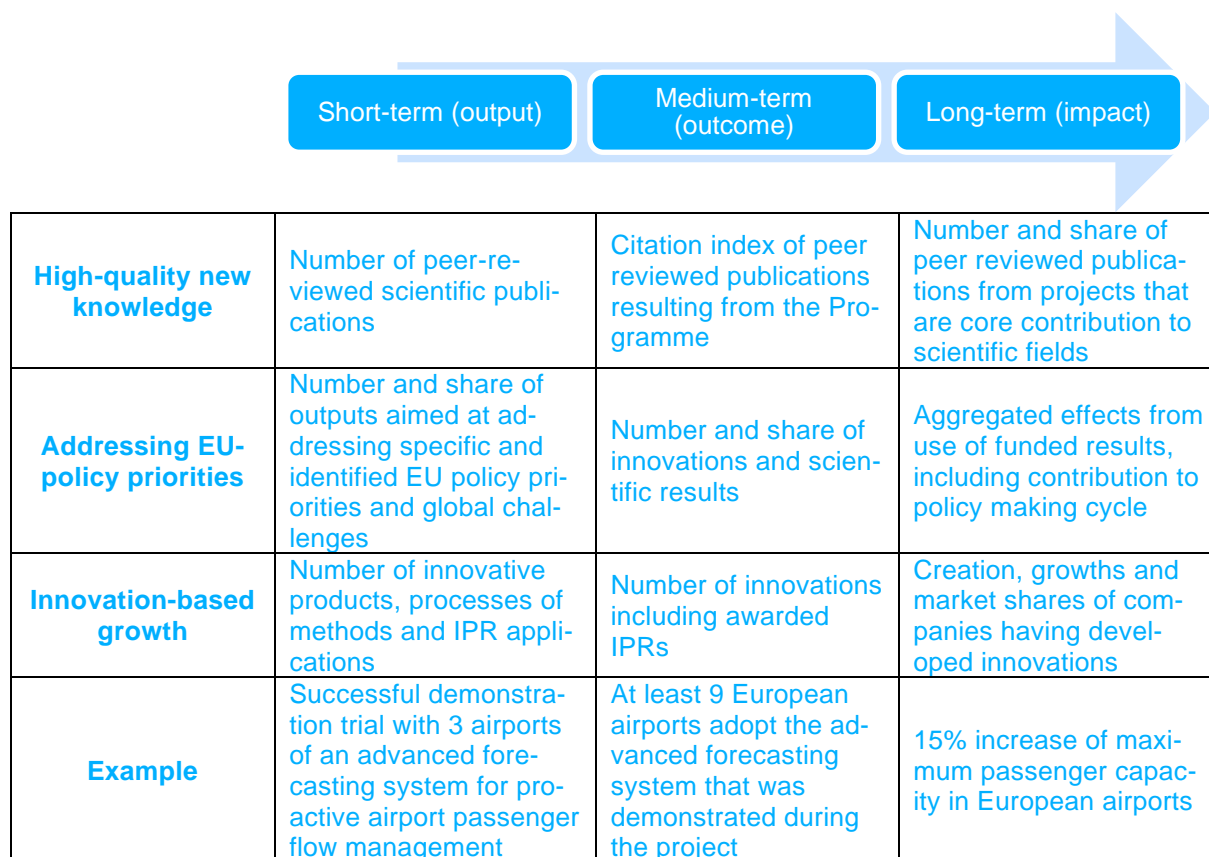
- Have in mind that during the Horizon Europe implementation, the European Commission aims to achieve an impact-driven programme by maximising the effect of research and innovation. To achieve this aim, the EC identified key impact pathways as follows:

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

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

Required sub-headings:

- *Provide a narrative explaining how the project's results are expected to make a difference in terms of impact, beyond the immediate scope and duration of the project. The narrative should include the components below, tailored to your project.*
- *Be specific, referring to the effects of your project, and not R&I in general in this field. State the target groups that would benefit.*
- Expected scientific impact(s), e.g., contributing to specific scientific advances, across and within disciplines, creating new knowledge, reinforcing scientific equipment and instruments, computing systems (i.e., research infrastructures).
- Expected economic/technological impact(s), e.g., bringing new products, services, business processes to the market, increasing efficiency, decreasing costs, increasing profits, contributing to standards' setting, etc.
- Expected societal impact(s), e.g., decreasing CO<sub>2</sub> emissions, decreasing avoidable mortality, improving policies and decision-making, raising consumer awareness.



Source: [Study to support the monitoring and evaluation of the Framework Programme for research and innovation along Key Impact Pathways](#), EC, DG Research

- Address the three areas of impact. In terms of scientific impact, describe the impact that your project will have on the scientific community – it can be helpful when writing this section to reflect on what you said in 1.1 regarding how the project is going beyond the state of the art. For economic impact, outline any foreseen economic/technological impacts from your project. Regarding societal impact, describe the effect your project will have on the non-scientific community. Think about who will benefit from your research and what changes will occur as a result of your project.
- Explain how the research project (including dissemination/exploitation/communication/ outreach activities) will contribute to Europe's economy and/or society – not just in terms of the research impact but also in terms of the results of the programme (e.g., a new concept of training, new approach, staff career development, etc.).
- Explain how the research and training programme will help in bringing ideas to market, where relevant. The role of the participants from the non-academic sector in this respect should be described, in terms of research commercialisation or training in entrepreneurship/tech transfer to the fellows, etc.
- Expand on a link to EU research/policy goals: e.g., [European Green Deal](#), [EU Missions in Horizon Europe](#), [MSCA Green Charter](#), [UN Sustainable Development Goals](#).
- Embed your project into those overarching goals – how do they contribute to them? On a very small scale is perfectly fine. For the SDGs, when you find the applicable SDG(s), you can indicate a specific target inside the mentioned goal. For defining SDGs, feel free to use the [JRC KnowSDGs Platform](#) which can help you to integrate the SDGs into the Impact section of your proposal.
- *Only include such outcomes and impacts where your project would make a significant and direct contribution. Avoid describing very tenuous links to wider impacts.*
- *Give an indication of the magnitude and importance of the project's contribution to the expected outcomes and impacts, should the project be successful. Provide quantified estimates where possible and meaningful. 'Magnitude' refers to how widespread the outcomes and impacts are likely to be. For example, in terms of the size of the target group, or the proportion of that group, that should benefit over time; 'Importance' refers to the value of those benefits. For example, number of additional healthy life years; efficiency savings in energy supply, etc.*
- To illustrate the magnitude and importance of the project contribution to outcomes and impacts, you can use a table. For example:

Expected outcome	Description	Magnitude	Importance	Expected impact

- For each expected outcome, provide quantified indicators. For example, expected revenues from new technologies, size of patient groups that will be affected by a new treatment, number of new jobs/potential projects/ career opportunities for the staff that will be created after a successful project, growth in the number of users of emerging technology, etc.
- Remember that in the [MSCA Work programme](#) (page 51) there are identified expected outcomes for the staff members and participating organisations that are related to the Staff Exchanges projects.
- More examples of expected outcomes and impact is provided in the [HE Programme Guide](#).

### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The proposal provides convincing evidence of contributing to scientific impacts beyond the scope and duration of the project. The consortium will contribute to capacity building in academia by training a substantial number of fellows at the PhD student level.
- The societal impact is credibly addressed, indicating the expected consequences beyond the scope and duration of the project (development of new policies and programmes, promotion of global cooperation, working towards SDGs in the region etc.)
- The proposal demonstrated the expected societal impact well, namely in terms of providing policy recommendations and specific achievements related to some of the United Nations Sustainable Development Goals.
- The potential technological impact is convincingly addressed, particularly in relation to progressing instrument performance characteristics beyond the presently established products, and by identifying alternative fields for applications.
- The expected economic and societal impacts beyond the project timeline are appropriate. Both impacts will be achieved by the advancement of first-stage researcher career prospects and the potential applicability of project results for future advanced technologies.
- The proposal sufficiently discusses and demonstrates the relevance of the expected scientific, economic, and societal impacts. It appropriately highlights the results in terms of the number of scientific publications and in terms of the useful suggestions to market operators and policy makers.
- The description of the project's impact in scientific, societal, and economical terms is clearly presented with appropriate performance indicators.
- The economic impact related to technical developments of the project is well identified. For example, the project expects a reduction of healthcare costs thanks to the improvement of the efficiency of healthcare systems.
- The proposed research's contribution to the specific scientific field is very well presented. The action will contribute positively to the scientific community and create additional basis for further studies in the field.

### WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The development of new and lasting research collaborations is neither defined in detail nor convincingly demonstrated, because it does not indicate any concrete strategies or actions expected to credibly secure their long-term viability.
- Expected impacts of the project are not convincingly addressed in the proposal. Its scientific impact is broadly defined; how its outcomes will allow to achieve its ambitious economic and technological impacts is not clearly outlined; and its capacity to contribute to the achievement of the described ambitious societal impacts and their sustainability beyond the lifetime of the project is not sufficiently demonstrated.
- The impact of the proposed project however is less developed. It is unclear how this proposed work will make a difference in terms of scientific impact(s) beyond the scope and duration of the proposed work and the proposed project's contribution to the expected economic impact(s) is not sufficiently addressed. Furthermore, the technological impact of the proposal is not clearly elaborated. It is also unclear how the proposed work will make a difference in terms of societal impact(s), beyond the scope and duration of the work. This section in the proposal does not contain a sufficient level of detail.
- The proposal does not provide enough support regarding its scientific, economic or societal impact. For example, neither market measures nor estimates of improvement are clearly

provided for the economic impact. Also, the magnitude of the impact of the developed AI scenarios is unclear.

- The technological and economic impacts are not clearly presented. The expected technological readiness level of developed technologies at the end of the project is not consistent with the proposed objectives, methodology, and activities during the project.
- The economic and technological impacts beyond the scope and duration of the project are not convincing as it remains unclear how, and to what degree of completion, the different research topics will be connected, demonstrated, and brought up to commercialization levels.
- It is not convincingly demonstrated how the expected research findings will be transferred to generate relevant societal impacts beyond the scope and duration of the project.
- The description of the project's impact in societal and economical terms is not sufficient because no indicators are presented.

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

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

Required sub-headings:

- Work Packages description (please include table 2).
- List of major deliverables (please include table 3).
- List of risks (please include table 4).

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

You should describe:

- *Consistency and adequacy of the work plan and the activities proposed to reach the action objectives (research/innovation activities, training, transfer of knowledge, etc.).*
- Show that the level of effort for each WP is in line with the amount of work involved and the overall needs of the project.
- For each WP, make sure the objectives are clearly presented.
- Describe an adequate number of significant deliverables, not only for the scientific aspects but also for the management, training and dissemination activities.
- Have in mind the rational distribution of responsibilities and tasks amongst the partners, with work package leaders' roles being equally distributed among the consortium. For the allocation of tasks and resources, make sure it is appropriate according to the capacities of the participating institutions (including relevant knowledge and expertise).
- Pre-visit preparations are valuable, for the smooth integration into the host organisation, especially for early career researchers. Make sure you provide sufficient information regarding the preparations (who will do what, when).
- The feasibility of the project can be demonstrated by providing a detailed description of the work plan, tasks, participating organisations and resource allocations.
- Beside the secondments, describe network activities that will be organized with the aim to share knowledge (e.g., workshops, meetings, trainings, online networking, etc.).

- *Credibility and feasibility of the secondments proposed. Describe how the proposed secondments are necessary, their duration is appropriate, and the staff profiles are suitable to implement the activities described.*
- Make sure your project is clearly structured, secondments are feasible and the link between work packages (and the associated research objectives) is well addressed. The duration of secondments, the link between them, how they support tasks and deliverables, and the availability of staff for secondments must be clear.
- Make sure that the distribution of the secondments is balanced throughout the years of the project implementation and justified and linked to the scientific activities/appropriate staff profiles. If you have any partner just receiving or just sending staff, make sure it is explained clearly and justified. Each partner needs to have a specific role and they need to complement each other.
- Secondments need to be aligned with participants' capacity e.g., partners with small capacity should not have a high proportion of the total secondments.
- Make sure that the staff profile is adequately described. The selection of the participating staff members should be according to their individual expertise and the whole team should complement each other's skills and knowledge. By selecting staff take into consideration gender balance and diversity, make sure you have a good mix and balance of experienced researchers (supervisors) and early-stage researchers from academia and industry.
  - For the early-stage researchers make sure that the length of the secondment is appropriate to the later impact (e.g. more than 1 month).
  - For the experienced researchers have in mind their role on effective implementation of the tasks and their experience and network in planning research cooperation after the project.
  - Don't forget to mention the staff profiles of the technical/management staff if secondments are also foreseen for them.
- *Important! Please read this section (3.1) carefully as there is information on what are Work Packages, tasks, deliverables. The tables provided (Table 2 and Table 3) must be included as part of your description*
- *In all cases, the beneficiaries must take all specific steps and measures to implement the principles set out in the European Charter for Researchers and the Code of Conduct for their Recruitment<sup>10</sup>.*

#§CON-SOR-CS§# #§PRJ-MGT-PM§#

<sup>10</sup> Both available at <https://euraxess.ec.europa.eu/jobs/charter/european-charter>



**Table 2: Work Package description**

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

<b>Work Package no.</b>	<b>"X*"</b>	<b>Start/end month<sup>11</sup></b>	<b>__/__/__</b>
<b>Work Package title</b>	(e.g., relevant title reflecting the R&I goals, Training, Transfer of knowledge activities, Management, Communication, Dissemination, etc.)		
<b>Lead participant</b>			
<b>Participating organisation short name**</b>			
<b>Total person months per Participating organisation:</b>			
<b>Objectives:</b> <i>Explain the main objectives of the Work Package (e.g., R&amp;I, Training, Transfer of Knowledge (Through secondments, After secondments /Through reintegration)</i>			
<b>Description of Work and role of specific beneficiaries/associated partners broken down and listed into numbered tasks including the following details:</b> ➤ Provide adequate information on the tasks and their timeline, with appropriately allocated secondments.			
<b>Task "X.1"</b> <ul style="list-style-type: none"> <li>Total number of person months allocated to secondments= " _ ":</li> <li>Brief description of the task in terms of relevant information concerning the specific activity/goal, the leading organisation of the task, the role(s) of the participating organisation(s), the profiles of the involved staff members, etc.</li> </ul>			
<b>Task "X.X"</b> <ul style="list-style-type: none"> <li>...</li> </ul> ➤ You can provide details on the methodology (specific tasks) that are not described in section 1 .			
<b>Description of deliverables:</b> - provide a brief description of the planned deliverables that is consistent with the deliverables to be listed from all Work Packages in Table 3 - i.e., consider consolidating the above listed tasks into a reasonable number of concrete outcomes (scientific and/or management, training and dissemination deliverables)			

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

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

- A potential Work Package structure could be as follows:
- 3-4 Research WPs
  - Knowledge transfer / Training WP (for secondments and networking)

<sup>11</sup> **Start/End Month** refers to months of the project not calendar months



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

### **Deliverables list**

A **deliverable** is a distinct output of the action, meaningful in terms of the action's overall objectives and constituted by a report, a document, a technical diagram, a software, training, conference, etc. The number of deliverables in a given Work Package must be reasonable and commensurate with the Work Package content and the associated secondments. Deliverables shall be encoded in Table 3.

Table 3 requires that deliverables should be divided into (a) scientific deliverables (i.e., scientific and technical content specific to the action) and (b) management, training exploitation, dissemination and communication deliverables.

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

**Table 3 – Deliverables list**

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

<i>Scientific deliverables</i>							
Deliverable no. <sup>12</sup>	Deliverable title	WP no.	Lead participant name	participations short	Type <sup>13</sup>	Dissemination level <sup>14</sup>	Due date <sup>15</sup>
D1.1 (<WP number>.<number of deliverable within that WP>)	Keep it short		Use organisation short names from Participants Table		R, ADM, PDE or OTHER	PU, CO, CI (see note). Note that PU means that once validated by the EC, the deliverable can be published on a freely accessible website.	(In months elapsed from the start of the project) e.g., M6, M12
<i>Management, Training, and Dissemination Deliverables</i>							
Deliverable no.	Deliverable title	WP no.	Lead participant name	participations short	Type	Dissemination level	Due date

- The following deliverables will have to be submitted for grants awarded under Staff Exchanges:
- **mid-term meeting** organised between the participants and the granting authority (typically mid-term meeting is due between M14-M18);
  - **progress report** submitted within 30 days after one year from the starting date of the action - include these reports as managerial deliverables;
  - **mobility declaration** (part of a continuous reporting) submitted within 20 days of the secondment of each seconded staff member, and updated (if needed) via the Funding & Tenders Portal Continuous Reporting tool;
  - **evaluation questionnaire** completed by the seconded staff members and submitted at the end of their secondment period (only one questionnaire for the staff); a follow-up questionnaire submitted two years later;

<sup>12</sup> Deliverable numbers in order of delivery dates. Please use the numbering convention <WP number>.<number of deliverable within that WP>. For example, deliverable 4.2 would be the second deliverable from Work Package 4.

<sup>13</sup> Please indicate the nature of the deliverable using one of the following codes:

**R** = Document, report (excluding periodic and final reports); **ADM** = Administrative (ethics/legal/administrative related outputs); **PDE** = dissemination and/or exploitation of project results (website completion, patents filing, conference, etc.); **DMP** = Data Management Plan; **OTHER** = Other including coordination

<sup>14</sup> Please indicate the dissemination level using one of the following codes:

**PU = Public:** fully open, e.g. web; **SEN = Sensitive:** restricted to consortium, other designated entities (as appropriate) and Commission services; Important: please note that upon approval by the REA Project Officer, the deliverables with Public dissemination level (PU) will be automatically published on CORDIS, the European Commission's primary portal for results of EU-funded research projects. Therefore, make sure the content is appropriate in terms of both quality and confidentiality.

**CI = Classified:** classified information as intended in Commission Decision 2001/844/EC.

<sup>15</sup> Measured in months from the project start date (month 1).

- **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.
- Keep the number of deliverables to a minimum.
  - Remember that you must actually deliver each Deliverable at the fixed due date if the project is funded and implemented, and too many deliverables will make your administrative workload very high.
  - Deliverable leader can be a beneficiary or an associated partner.
  - Deliverables are submitted to the REA Project Officer in PDF format, so ensure that it would be feasible to present your deliverables in this way.
- Consider the risks that might endanger reaching the action's objectives and the contingency plans to be put in place should risk occur.
- Include a list incorporating specific research risks and project management risks. Describe practical mitigation and contingency plans for both.
  - For each identified risk, specify the level of likelihood (probability that the risk occurs even with the implementation of mitigation measures) and the level of severity (seriousness/impact of the risk on the overall project).
  - Some potential management and technical risks include: partners leaving the consortium, individual researchers leaving their organisations, delay of secondment, not possible to implement secondment, failure of recruitment, IPR disputes.

**Table 4 – Risks List** #@RSK-MGT-RM@#

- Table to be included in above sub-heading "List of risks"

Risk no.	Description of risk	WP no.	Proposed mitigation measures
R1(Include likelihood: L/M/H & severity: L/M/H)	e.g., delay in planned secondments		

- *A **critical risk** is a plausible event or issue that could have a high adverse impact on the ability of the project to achieve its objectives.*  
**Level of likelihood** to occur: Low/medium/high  
*The likelihood is the estimated probability that the risk will materialise even after taking account of the mitigating measures put in place.*  
**Level of severity:** Low/medium/high  
*The relative seriousness of the risk and the significance of its effect.*

#§RSK-MGT-RM§#

### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The proposal presents a well-structured work plan, which outlines key activities and milestones, with clearly defined work packages, tasks, and deliverables. The timeline is well-distributed, and the roles of each partner are clearly assigned, facilitating efficient execution. The alignment between the work plan and the objectives is clear, ensuring that the proposed activities are logically structured to achieve the expected outcomes. The proposed secondments are necessary for the implementation of the activities described.
- The staff availability as well as their work capacity fully corresponds to the eligible part of the work plan. Furthermore, the staff is adequate in terms of profiles and it is appropriate to implement the proposed activities.
- The workplan is of a very good quality. It contains a considerable amount of detail to ascertain that it is consistent with reaching the project's objectives. All the secondments described are well-thought-out, comprehensive and necessary to implement the activities described, including their duration. The plan for secondments is consistent with the activities outlined in the Work Plan. The profile of the staff is well diversified.
- The scientific and technical work packages (work packages 1-5) are very well articulated with a detailed description of the specific activities and objectives. The deliverables are well-described and measurable. The milestones and related means of verification are scheduled to track the progress effectively.
- The work plan is very intense and ambitious, with varied activities, yet it is also consistent and credible, and a central strength of the proposal. The planning of resources in terms of person months is well balanced. The secondments constitute the core of the proposal; they are divided into three logical phases and have clear goals and purposes in line with the objectives of the project, which are essential for the knowledge transfer and development of new theories.
- The work plan is well-designed, consistent, and in line with the defined methodology. The inter-connection between the work packages is clear, as is the description of specific tasks, which are appropriately scheduled, including well-defined deliverables that are consistent with the proposed objectives. The involvement of the participating entities in each work package is also clearly stated.
- The participants are sufficiently compatible and complementary and the tasks allocated to them are consistent with their expertise.
- Tasks are specifically assigned to participating organisations and deliverables are linked to planned activities. The complexity and technical challenges of the tasks are described in sufficient detail
- The numbers and profiles of the staff indicated by the partners are appropriate to implement activities foreseen for the secondments. The staff availability and the interdisciplinarity of the planned secondments have been satisfactorily demonstrated.
- The project management structure, progress monitoring measures, and practical arrangements in the participating institutions are very well outlined, supporting the action's feasibility.
- A detailed and credible risk management plan is in place, including convincing research and management-related mitigation measures to reduce the probability of risk occurrence and their impact.

### WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The feasibility of the proposed project is not very well justified. For example, there are some imbalances in the number of PMs allocated in relation to the partners' tasks in the WP, such as WP1 and WP2, where partners have a disproportionate number of PMs for the tasks they are involved in. In addition, there are too many milestones, making it hard to assess when the key project's milestones will occur and potentially creating challenges in project delivery and

- hindering progress. Finally, there is not enough information regarding the data management plan, namely when it will be delivered, and it is unclear how its implementation will be achieved.
- For some of the work packages, the resource allocation (person months) or the timelines of different tasks are not adequately presented.
  - The plan for the secondments is not sufficiently developed. It is not sufficiently clear how the secondments will be organized and their appropriateness for the planned tasks is not adequately explained; the content, duration and way the secondments are integrated within the work plan are not sufficiently clear. The qualifications of the seconded staff and the goals of each stay are not sufficiently specified to justify the feasibility of the work plan.
  - It is not clear how research activities that are scheduled within the first half of the proposed project will be monitored, due to the scheduling and focus of technical deliverables in the second half of the proposed project.
  - The project deliverables are overestimated compared to the person months and human resources dedicated to the project.
  - An inconsistency was identified in the number of person months between the Work Plan and the budget table for one participant. There is an inconsistency in the total number of person-months in different parts of the proposal.
  - The risks related to personnel issues, including staff availability, are not appropriately elaborated.
  - Risks related to the administration aspects of the secondments (such as accommodation finding, work visa arrangements where applicable, or the need for support around cultural assimilation for visiting researchers) have not been sufficiently considered.
  - Risk management does not sufficiently address scientific risks related to methodological development as well as risk and mitigation measures related to data privacy. The potential scientific risks, like a failure to achieve a specific result/task, and the corresponding mitigation actions, are not sufficiently discussed.
  - The risk assessment and mitigation strategies do not convincingly consider the acquisition of actual technical data of relevant components. In addition, potential risks concerned to the application of AI in complex technical problems are not sufficiently considered.

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

Required sub-headings:

- Appropriateness of the research infrastructure and capacity of each participating organisation, as outlined in Section 4 (Participating Organisations), in light of the tasks allocated to them in the action.
- The aim here is to explain who is doing what and show that they have the necessary infrastructure to do it. All partners need to have a clear role and adequate resources.
- This section should complement Section 4, not duplicate it (instead, refer to it as appropriate).
- Describe how the consortium has the necessary infrastructure (research and administrative) to implement all aspects of the programme (research, training, admin, communications, exploitation etc.).
- Describe how the participants provide an excellent environment for hosting and supporting the staff who visit them, such as, help with finding accommodation, with immigration and other practical matters, including:
  - EURAXESS Centres who assist with mobility issues. There are >600 support centres all over Europe.
  - Many universities and research centres are EURAXESS Contact Points and have a designated person who can help visiting researchers.

- If consortium partners have endorsed the European Charter for Researchers, an updated version of the 2005 Charter and Code, you should say so.
- If consortium partners have the “HR Excellence in Research” logo, state this too. The list of organisations by country with the “HR Excellence in Research” or HRS4R Acknowledged Institutions is available on the [EURAXESS portal](#).

- Consortium composition and exploitation of participating organisations' complementarities: explain the compatibility and coherence between the tasks attributed to each beneficiary/associated partner in the action, including in light of their experience; Show how this includes expertise in social sciences and humanities, open science practices, and gender aspects of R&I, as appropriate.

- Explain a coherent, effective work plan and the demonstrated appropriateness of the management structure/procedures (project management strategy/ management bodies, progress monitoring measures, supervision, support, hosting arrangements provided to the seconded researchers, etc.).
- Explain how the consortium is exceptionally well qualified to implement this programme by referring to:
  - Complementarities/synergies in expertise between all participants and how this complementarity allows them to successfully deliver the programme (if appropriate, use a diagram or table).
  - How their previous experience (and collaboration, if applicable) makes them suitable for their tasks here.
- Outline the commitment of each participant by showing that they are all highly active in the project – refer to earlier sections – use a table.
- Particularly important for high-income TCs contributing their own budget – they should make clear their financial commitment in this section.
- Note any relevant expertise in social sciences and humanities, open science practices, and gender aspects of R&I among the partners.

- Exceptional funding (if applicable)

Only entities from EU Member States, from Horizon Europe Associated Countries or from countries listed in the HE Programme guide are automatically eligible for EU funding. If one or more of the partners requesting EU funding is based in a country that is not automatically eligible for such funding, the application shall explain in terms of the objectives of the action why such funding would be essential. **Only in exceptional cases** will these organisations receive EU funding. The same applies for international organisations other than IERO (not in EU).

If applicable, explain why participants from **other countries**<sup>16</sup> (i.e. countries that are neither EU Member States nor countries associated to Horizon Europe, nor in the [List of Participating Countries in Horizon Europe](#)) are essential for implementing the project.

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

<sup>16</sup> As described in the General Annexes, successful applicants established in a country in the process of associating to Horizon Europe, will not be treated as established in an associated country if the association agreement does not apply by the time of the signature of the grant agreement.

- access to particular research infrastructures
- access to particular geographical environments
- access to particular data.”

Example:

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

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

- Explanation of participation of the **associated partners linked to a beneficiary** (if applicable)

Explain the activity performed by the associated partners linked to a beneficiary<sup>17</sup> (see definitions in MSCA Work Programme) and the number of person-months of the beneficiary that will be implemented by the linked associated partner.

- The definition of ‘associated partners linked to a beneficiary’ is available at the beginning of the handbook (definition section)
- According to the SE Guide for Applicants (p.7, point 3), for secondments from associated partners linked to a beneficiary, only the sector (academic or non-academic) of the beneficiary counts and the linked associated partners will be considered to belong to the same sector as their beneficiary.
- Secondments between associated partners linked to a beneficiary and their linked beneficiary are not possible.
- Associated partners linked to a beneficiary cannot host secondments. Only beneficiaries to which they are linked can host secondments.

#§QUA-LIT-QL§# #§WRK-PLA-WP§#

#### STRENGTHS – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS

- The cutting-edge scientific infrastructure and dedicated staff in the institutions involved in the project will be shared during the project implementation and secondments.
- The number of staff available for the project is justified, and the staff member profiles have been carefully considered to support the project. The tasks assigned to participants are aligned with their relative expertise.
- The participating organisations possess good expertise in the areas covered by the research. The qualifications, knowledge, and prerequisite experience of the relevant team leaders, members, and staff are robust regarding open scientific approaches and accomplishments. The participants’ expertise is well described. As such, it can be deduced that the participants are compatible and complementary.
- The profile of staff available for the execution of activities, with complementary skill sets and expertise in both academic and non-academic sectors, are appropriate for the planned secondments and for the successful implementation of the proposed objectives.
- The partner organizations are highly compatible and complementary, with extensive experience and well-documented expertise in the scientific fields addressed by the proposal. The distribution of tasks between partners is well-balanced and in line with their expertise. The presented track record demonstrates sufficient experience in Open Science.
- The infrastructures and capacity of each partner are very appropriate for all the tasks described, combining a range of different environments in which research, training and innovation will be

<sup>17</sup> Beneficiary means EU MS/AC participant



fostered. All the participants are complementary and compatible, and many of them have already established research collaborations in the past. The experience is well-balanced between institutions, expertise and tasks.

- The consortium demonstrates high synergy and the necessary expertise for the project since participants have a solid track record, demonstrated by excellent publications in the field and previously secured relevant EC-funded programs.
- The participating organizations have appropriate infrastructure and equipment necessary to conduct planned work. The infrastructures and capacities well correspond to the allocated tasks to the respective partners.
- The proposal highlights the significant record in open science achievements of the participants, indicating a commitment to further promoting open science practices.
- Policies and procedures for hosting visiting staff are correctly described.

#### **WEAKNESSES – EXAMPLES FROM PREVIOUS EVALUATION SUMMARY REPORTS**

- The proposal does not address in sufficient detail how such a large set of partners will be effectively organized and managed into a cohesive group with synergies.
- Progress monitoring and quality management are not properly addressed. The governance structure is not described.
- The selection of participant profiles in terms of compatibility and complementarity is not fully coherent. The competency profiles of some of the partners show some degree of overlap. The expertise of some of the partners is described in general terms and their connection to the particular research areas of the project is not sufficiently justified.
- The involvement of the participants is unbalanced and their complementarity and roles are not sufficiently justified. Also, it is not sufficiently specified how the infrastructure of some participants will be utilised.
- The staff, infrastructure and equipment available at the non-academic partner do not support the implementation of some of the proposed activities.
- The role of key people is not sufficiently clear or convincing in the case of all partners. This raises some concerns about the participants' compatibility and complementarity in some respects.
- The capacity of the participants is well described and appropriate for certain tasks, but not suitable for others. Also, the SMEs involved are promising, but there is insufficient evidence in the proposal that they have the necessary market experience required to undertake the commercially oriented tasks assigned to them.
- The capacity of the consortium is not clearly described in the proposal. For example, the proposal insufficiently justifies some of the academic partners' workload balance and the proposed human resources.
- The capacity of the coordinator to manage an EC funded project is not convincingly demonstrated.
- The capacity of each participating organization is not convincingly demonstrated. For example, for some participating organisations the number of R&I staff is low compared to the planned secondments, including sending and hosting arrangements.
- The role of the associate, non-academic partners is not made sufficiently clear, especially in respect of the secondments. Also, the academic profile of some partners does not fully demonstrate a background in the interdisciplinary field being considered.
- The arrangements to host and integrate the seconded researchers into the research teams are not explained in sufficient detail.

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

**DOCUMENT 2** (no overall page limit applied)

**4. Participating Organisations**

**Note that:**

- Any relationship between different participating institutions or individuals (e.g. shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, family-ties, etc.) must be declared and justified in this part of the proposal.
- All information provided (including table 5) must be based on current data, not on projections; for the annual turnover, approximations are acceptable and any other additional explanations to help assess operational capacity.
- The data provided relating to the capacity of the participating institutions will be subject to verification during the grant preparation phase.
- The absence of sufficient information in this section may be considered by REA as a ground to disregard the participation of an organisation based on insufficient operational capacity.

**Table 5– Data for non-academic beneficiaries**

Name	Location of re- search premises (city/country)	Type of R&I ac- tivities	No. of full - time employ- ees involved in the project	No. of em- ployees in R&I	Web site	Annual turnover (approx. in Euro)

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

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

**Table 6 – Organisations (Beneficiaries and Associated partners) data**

Beneficiary (organisations in EU MS/AC) legal name	
General description	Add a short general description of the beneficiary and a short description of the actual centre/department/laboratory participating in the project.
Role and profile of key people	Include names, qualifications of the person(s) supervising the action.
Key Research Facilities, Infrastructure and Equipment	Demonstrate that the team has sufficient resources to offer a suitable environment to seconded staff and to contribute significantly to the research/innovation activities proposed.

<b>Independent research premises?</b>	Please explain the status of the beneficiary's research facilities – i.e. are they owned by the beneficiary or rented by it? Are its research premises wholly independent from other beneficiaries and/or associated partner organisations in the consortium?
<b>Previous Involvement in Research and innovation actions</b>	Describe relevant research/ innovation actions in which the organisation took part
<b>Current involvement in Research and Innovation actions</b>	Describe relevant research/ innovation actions in which the organisation is currently participating
<b>Publications and/or research/ datasets/ softwares/ innovation products/ other achievements</b>	Max 5 key elements of the achievement, including a short qualitative assessment of its impact and (where available) its digital object identifier (DOI) or other type of persistent identifier (PID). Publications, in particular journal articles, are expected to be open access. Datasets are expected to be FAIR and ‘as open as possible, as closed as necessary’.

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

<b>Associated partner linked to beneficiary organisations (if applicable) Legal Name</b>	
<b>General description and link to the concerned beneficiary</b>	As above
<b>Key Persons and Expertise</b>	As above
<b>Key research facilities, infrastructure and equipment</b>	As above
<b>Do you have independent research premises?</b>	As above
<b>Previous involvement in research and innovation actions</b>	As above

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

### Declarations

Name (institution / individual)	Nature of relationship

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

### 5. Explanation for the use of generative AI in the preparation of the proposal (when applicable)

Applicants should provide the respective information as described above in the Guidance on the use of generative AI tools for the preparation of the proposal.

AI definitions are available in the Definition from the European Commission’s High-Level Expert Group on Artificial Intelligence.

See also Living guidelines on the responsible use of generative AI in research and recommendation for researchers, research organisations and funding organisations.

### 6. Environmental considerations in light of the MSCA Green Charter<sup>18</sup>

Please explain how the proposed project would strive to adhere to the MSCA Green Charter during its implementation. Please indicate here - max 1/2 page - what actions you propose to take to ensure the sustainable implementation of project and to mitigate its environmental impact, in line with the principles set out in the MSCA Green Charter.

- The goal of the MSCA Green Charter is to encourage sustainable thinking in research management and to reduce the environmental impact of research activities. All MSCA projects are encouraged to adhere to as many provisions of the Green Charter as possible, on a best effort basis.

<sup>18</sup> Available at <https://ec.europa.eu/research/mariecurieactions/green-charter>. The MSCA Green Charter constitutes a code of good practice for all recipients of MSCA funding – both individuals and institutions – and promotes the mainstreaming of environmental considerations in all aspects of project implementation. In so doing, the Charter seeks to reduce the environmental footprint of MSCA-funded projects, to raise awareness of environmental sustainability, and to serve as a catalyst in promoting best practice in sustainable research management.

- You can describe sustainable measures of secondment implementation (especially regarding travel arrangements) and sustainable project management.
- Some measures individuals and institutions are invited to consider are to:
  - reduce, reuse and recycle, promote green purchasing for project-related materials,
  - ensure the sustainability of project events,
  - use low-emission forms of transport,
  - promote teleconferencing whenever possible,
  - use sustainable and renewable forms of energy,
  - develop awareness on environmental sustainability, etc.
- The European Commission has published a set of guidance material together with the MSCA Green Charter, which can serve as inspiration.
- The MSCA-NET Green Deal Policy Brief includes additional information on how to address green aspects throughout all sections of the application and the link between the EU Green Deal and MSCA.