

Net4Mobility⁺



Net4Mobility+

Network of the Marie Skłodowska-Curie Actions National Contact Points for the mobile scientific and innovation community

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MSCA-COFUND DP Handbook 2019

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1. Disclaimer and Acknowledgements

Disclaimer:

This is an UNOFFICIAL document prepared by the Irish Marie Skłodowska-Curie Office as part of the EU-funded Project “Net4MobilityPLUS” of National Contact Points (NCP) for the Marie Skłodowska-Curie Actions (MSCA).

- The information contained in this document is intended to assist and support, in an unofficial and practical way, anyone submitting a Proposal for the MSCA-COFUND DP Call for the deadline 26/09/2019. It is therefore **NOT** a substitute of European Commission Documents, which in all cases must be considered as official and binding. In particular, you must consult the COFUND 2019 Guide for Applicants (GFA) [http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-cofund-2019_en.pdf] and the MSCA WP 2018-2020: (http://ec.europa.eu/research/participants/data/ref/h2020/wp/2018-2020/main/h2020-wp1820-msca_en.pdf). Both documents are frequently referred to throughout this handbook.
- Please note that this document is susceptible to data corruption, unauthorised amendment and interception by unauthorised third parties for which we accept no liability. All reasonable precautions have been taken to ensure that this document neither contains nor transmits any viruses and we recommend that you ensure that your anti-virus programmes and procedures are up to date.
- This document may NOT be considered in any way as deriving from and/or representing the views and policies of the European Commission and the Research Executive Agency. Likewise, it may NOT be considered in any way as a document deriving from and/or representing the views and policies of the entities which are Beneficiaries to Net4Mobility+.

Acknowledgements:

- We thank Colleague-NCPs from the NCP-Project H2020 “Net4Mobility+” as well as EC / REA Staff and External Experts/ Scientists who acted as Evaluators for their valuable insights.

2. How to use the MSCA-COFUND Handbook

This MSCA-COFUND handbook can be used to **assist and support** applicants submitting a proposal for the September 26 2019 deadline. This Handbook should be **used in conjunction with the Part B templates** downloaded from the [Participant Portal](#) as the information in this document complements the information in the Part B templates.

Orange text boxes contain additional suggestions & information for each section of the proposal. We have not removed or replaced any information in the original Part B templates which are contained in the grey boxes.

Single line text boxes include strengths from Evaluation Summary Reports.

Double line text boxes contain examples of common weaknesses from Evaluation Summary Reports of unfunded applications which were on the reserve list.

3. Key tips for the proposal template and layout

The following information is important to familiarise yourself with as it will make the review process for the evaluator easier. It covers; 1. general points, 2. proposal template, 3. proposal layout and 4. language.

1. General Points

- **Acronym:** Use a self-explanatory title and a memorable acronym.
- Ensure that the Acronym is short, easy to pronounce, easy to remember by the Evaluators, and that it cannot be construed as inappropriate in English or in another language.
- The proposal acronym and the COFUND type should be used as a header on each page, together with the scheme to which you are applying (i.e. DP or FP).
- Be aware of the overall weighting of each criterion. You need to score well in all sections in order to be funded.

Section	Weighting
1. Excellence	50%
2. Impact	30%
3. Implementation	20%

2. Proposal Template

- Use the proposal template provided including the exact sub-headings:
 - It matches the evaluation template and helps you to put the correct information in the correct place.
 - Some evaluators use a “checklist” approach to marking – if the information is not in the correct section, they will give you “zero” for that sub-criterion.
 - Evaluators cannot give you positive marks for any omitted information, even for ‘obvious points’.
- Put Page Numbers (format Page X of Y) in the Footer

3. Proposal Layout

- Use charts, diagrams, text boxes, figures to explain aspects of the project. Do not just use long blocks of text.

- Use tables when possible, as they break up the text. While tables can also help you to save some space (there is no minimum font size, provided that it is legible) they should not be used for the mere purpose of circumventing space limits.
- Use the correct font size (minimum 11), single line spacing and page margins (at least 15 mm) as indicated in the Guide for Applicants (p. 31).
- Ensure any colour diagrams etc.. are understandable when printed in black and white.
- Use highlighting where appropriate (bold, underline, italics) but don't overdo it!
- Literature references in footnotes, font size 8 or 9.

4. Proposal Language

- Avoid jargon. The evaluators might not be experts in your research area.
- Explain any abbreviations.
- Use simple, clear text.
- Avoid long sentences.
- Avoid too much repetition. Sign-post to other parts of the proposal if necessary.
- Do not copy and paste information from other documents/websites. Instead tailor information to fit with your proposal.

4. Part B

Annex 5 – Part B template

START PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

**Co-funding of regional, national and
international programmes (COFUND)**

Call: H2020-MSCA-COFUND-2019

PART B

“PROPOSAL ACRONYM”

Insert a project graphic under the title and use it as a header on all pages of the application

This proposal is to be evaluated as:

[DP][FP]

[delete as appropriate]

Table of Contents

Include a full table of contents with sub-headings and page numbers.

In drafting PART B of the proposal, applicants **must follow** the structure outlined below.

0. GENERAL DESCRIPTION OF THE PROGRAMME (Maximum 2 pages)

INFORMATION ON THE BENEFICIARY

START PAGE COUNT

1. EXCELLENCE

2. IMPACT

3. QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

STOP PAGE COUNT

4. ETHICS ASPECTS

5. LETTERS OF COMMITMENT FROM PARTNER ORGANISATIONS

NB: Applicants must ensure that sections 1-3 do not exceed the limit of 30 pages.

Please note that the principles of the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers promoting open recruitment and attractive working conditions are recommended to be endorsed and applied by all the funded participating organisations in the MSCA. Some of these principles are reflected as obligations in the Grant Agreement and are therefore contractually binding.

0. General description of the programme (Maximum 2 pages, not evaluated)

Although this is not evaluated, it is crucial to setting the scene for the evaluator.

Describe the beneficiary and partner organisation structure

- Describe the beneficiary and the partner organisations (if any). Be clear what type of beneficiary is leading the project. For example, government funding organisation; research center/university etc. Consider that your evaluators are very likely to be based abroad, and therefore they need some (synthetic) context.
- Provide a general statement on the beneficiary strengths (research and innovation strengths; funding achievements; industry collaboration; main RTD outcomes; etc.). If appropriate, references to the regional or national research and innovation ecosystem could be included.
- Mention if the research carried out **by the project** or the beneficiary aligns with specific research disciplines based on national or regional Research and Innovation Strategies for Smart Specialisation (RIS3 strategies).
- Demonstrate how the beneficiary is the most suitable/best entity to run the programme. Any successful experience with doctoral trainings? Notable intersectoral/international partnerships?

Outline the programme and its structure.

- **Introduce the size immediately**-duration of the programme (36-60 months), how many early-stage researchers (ESRs) will be enrolled in a Doctoral Programme, how many calls, the duration and the registration arrangements for each doctoral candidate (typical time needed to complete a PhD in the corresponding country).
- Describe who is involved in the project (the main beneficiary, recruiting-partner organisations, non-recruiting partner organisations. Consider using a diagram to illustrate the different participants and the relationship between them).
- Describe the COFUNDs Programme aims and objective. Remember that it is not only about 'writing a PhD', and that you need to emphasise that your doctoral candidates will receive some holistic training.
- Describe the need and potential impact of the COFUND programme. If possible, emphasise the policy relevance of the programme.

INFORMATION ON THE BENEFICIARY

Name of Beneficiary	Beneficiary short name	Country	Academic (Y/N)

START PAGE COUNT

Under each sub-criterion it is advised to develop at least the following points:

1. Excellence**1.1 Quality of the selection/recruitment process for the researchers (transparency, composition and organisation of selection committees, evaluation criteria, equal opportunities)****1.1.1 Demonstrate the transparency of the selection process of the researchers**

Dissemination of the calls in appropriate ways;

Number this section: 1.1.1.1 Dissemination of the calls in appropriate ways

Suggested Length: ~2 pages

Start with a statement reminding the evaluator about the layout of the COFUND (How many researchers will be recruited, how many calls there will be over the duration of the programme and where the host organisations could be).

- If applicable, state whether a programme manager (PM) will be appointed (full-time/part-time) upon signing of the Grant Agreement.
- Describe that the PM will set up a PR, dissemination and public outreach strategy for the promotion of the programme and its calls. State the start month and the end month of these activities.
- Comment on the PMs role in monitoring interest in the calls and adapting PR strategy where necessary.

Describe the Dissemination Strategy

- If available mention the programme logo. Describe that the programme logo & MSCA logo will be used on a dissemination material for the call.
- Describe the central services / offices / expertise of the beneficiary and partner organisations will be made available to the programme e.g. Research office, Graduate Studies office, communication office, marketing, international affairs and what experience do they already have in H2020 or MSCA?
- Describe the **target group** of the programme and that the PR strategy will be tailored to them (early-stage researchers who have backgrounds in X). Describe how the various research topics will be proposed to them.

- Include a definition of the **experience necessary** (no PhD and less than 4 years FTE research experience) and any **mobility requirements** (as per MSCA).

Describe the dissemination activities that will be used. Make sure to provide specific details to show the numbers that will be reached:

- Programme website-this is a key resource for highlighting the details of the programme;
- Programme launch event-where will this take place, what key audiences will be invited, what material will be developed etc.;
- Other websites-list all the websites where the information of the calls will be detailed (beneficiary organisations, partner organisations etc.). Mention websites specialised in the recruitment of doctoral candidates.
- Programme social media-will the programme have a Twitter, LinkedIn etc. account?
- Other social media-list the followers on the beneficiary organisations, partner organisations social media;
- Promotion via networks of people and organisations involved (EU projects with large consortiums etc.). Mention how you will reach out prospective PhD students.
- Name relevant conferences, exhibitions, professional networks, journals (scientific, industry) where calls could be advertised. Focus on initiatives/outlets that are directly relevant to pre-doctoral candidates;
- Use of the [EURAXESS website](#);
- Include how you will take into account the gender balance when advertising;
- Mention any PR activities.

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

Number this section: 1.1.1.2 Information provided to the candidates

Suggested Length: ~2 pages

Start with a short paragraph containing the details of where the information will be available – a programme specific website hosted on the centre website, with downloadable documents, contact info for the PM and links to social media outlets.

Suggested paragraphs:

- Information on the background to the programme.
- Description of the research topics/themes/areas of the PhD projects to be pursued.
- Information on the host organisations and of the potential supervisors.
- Information on terms and conditions of the doctoral programme. State that all relevant information (working conditions, minimum gross salary, host institution,

evaluation process, etc.) will be available on the programme website, together with (downloadable) application materials. Make reference to concrete documents: FAQs, guide for applicants, legalities, promotional brochures, application forms, etc..

- Profiles of existing doctoral researchers (once they are recruited).
- Information on the application, evaluation and selection process. Mention the application documents (e.g. CVs, letters of motivation). Refer to section 3.3.2.
- If applicable, provide details about the programme's online application system
- Application support – PM (and possibly part of the host's operations team) through dedicated email address – technical support for application.
- Information on results.
- Feedback provided to applicants (link to section 1.1.2.1).
- Redress procedure (link to section 1.1.2.1).
- Information provided to awarded early-stage researchers, including relocation advice and support, induction..

Eligibility criteria and application requirements;

Number this section: 1.1.1.3 Eligibility criteria and application requirements

Suggested Length: ~1 page

- Provide a short introduction paragraph outlining criteria for the doctoral programmes i.e. number of positions on offer, number of calls, duration. It is expected that DPs would offer recruitment of ESRs corresponding to the typical time needed to complete a PhD in the host institution's country. (See [COFUND GFA p. 11](#)).
- Provide paragraphs detailing the following:
 - **Eligibility of applicants**-Outline the information that will be provided to applicants in regards to their research and mobility requirements:
 - Research Experience for doctoral candidates: must at the date of recruitment or the deadline of the co-funded programme's call be within the first four years (full-time equivalent research experience) of their research careers and not yet have been awarded a doctoral degree.
 - Mobility requirements: ESRs may not have resided and/or carried out their main activity (work, studies, etc..) in the country of the host organisation for more than 12 months in the 3 years immediately before the co-funded programme's call deadline(s) or the date of recruitment.
 - **Eligibility of supervisors** – The COFUND GFA states that *“Attention will be paid to qualitative and quantitative supervision and mentoring arrangements as well as to*

career guidance. A supervisor with adequate experience must be appointed for each researcher to provide the researchers with academic support and a career development plan". If possible, co-supervision arrangements should be introduced.

- **Application requirements** – Say that ESRs will be allowed either to propose their own project (often within certain research areas) or to choose among research projects (ideally, broadly defined) proposed to them.
- **Secondment(s) requirements:** Applicants should be encouraged to undergo periods of cross-sectoral mobility and interdisciplinarity in their programmes such as intersectoral secondments (recommended minimum duration: 3 months) and short visits.
- **Ethics requirements** (link to section 1.1.2.1 for the ethics committee details).

Any other relevant point.

Number this section: 1.1.1.4 Any other relevant point

1.1.2 Describe the organisation of selection process

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

Number this section: 1.1.2.1 Composition of committees involved in the different stages of the process (i.e. eligibility check, evaluation, selection, appeal);

Suggested Length: ~1.5 pages

- Begin with a reference to the [Charter and Code](#) for the recruitment and selection of doctoral researchers.
- Include a figure giving an overview of the selection process and the committees involved.

Include a table describing the composition of the committees involved in each stage of selection. This should include:

- **Eligibility check** – PM with Programme Coordinator (PC).
- **Ethics committee** – if ESRs are asked to present their own research project, at this stage they should go through some form of ethics review.
- **Assessment of application materials:** refer to Code of Conduct and link to section 1.1.2.2. How many experts per application? As per the [COFUND GFA](#) (p. 8): *"Independent evaluators, with no conflict of interest, must be involved at all stages of the selection process, a good balance between experts related to the beneficiary and independent experts must be ensured".* Mention here the application materials to be reviewed e.g. CVs, motivation letters...
- **Establish Ranking-List** from Review Panel: consensus meeting (remote where necessary via teleconference), mention who will chair it, measures for extreme differences in scores. Explain how similar ranked proposals will be decided on.

- **Interview Panel** – at least 3 interviewers, one of which (minimum) should be external. The panel should be gender balanced. It might be worth including that the panel should have unconscious bias training (for instance <https://www.leadequalitynetwork.com>). The PM and an HR representative should sit on the interview panel as well.
- **Funding Decision:** top scoring candidates presented to Steering Committee who will endorse the final funding decision. Mention the names of your Steering Committee's members (showing both their suitability and independence).
- **Redress Committee:** refer to code of conduct and link to section 1.1.2.2.
- **Feedback:** via the Programme Manager and Human Resources.

Selection of experts;

Number this section: 1.1.2.2 Selection of experts

Suggested Length: ~1 page

Provide paragraphs on:

- Criteria for the selection and balance of internal and external experts. Show that there is a good balance between internal and external experts. While selecting your experts, make sure to ensure adequate experience, geographic, sectoral and gender balance, management experience, involvement in policy etc..
- Expert appointment: appointment letter / contract including a declaration of no conflict of interest, a confidentiality clause and a requirement to conform to the European Code of Conduct for the Recruitment of Researchers.
- Explain the rules for conflict of interest – could use the H2020 rules as described [here](#). Adjust the relevant documents to the selection of doctoral candidates.

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

Number this section: 1.1.2.3 Researchers' selection workflow and powers entrusted to the different actors

Suggested Length: ~1/2 page

Provide detailed information on:

- The stages of the selection workflow.
- The responsible person/committee at each stage of the selection process.
- State the duration of each selection stage.
- Consider providing a visual illustration of the process (e.g. a recruitment chart or timeline).

Any other relevant point.

Number this section: 1.1.2.4 Any other relevant point

1.1.3 List the Evaluation Criteria

Criteria/sub-criteria for the selection of researchers;

Number this section: 1.1.3.1 Criteria/sub-criteria for the selection of researchers

Suggested Length: ~1/2 page

- Start with 1-2 sentences recapping the evaluation process e.g. application materials reviewed by X internal and external experts.
- Include a table outlining the evaluation criteria that will be used by the evaluators to score the proposal. Show that these criteria (and corresponding scoring system) will ensure objective and internally-consistent selection procedures.

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

Number this section: 1.1.3.2 Any other relevant point (scoring, thresholds, etc..).

Suggested Length: ~1 page

- **Scoring:** Keep it simple and easy for the reviewer to understand! If you ask for a CV and a motivation letter (or anything similar), make sure to have an adequate scoring system for each application document.
- Alternatively, if the beneficiary has its own evaluation system/criteria already in place you can use this (or merge it with additional selection procedures, aimed at ensuring a fair, transparent, competitive and independent process).
- **Threshold:** Include a table showing the threshold, weightings and ex-aequo priority order. Those for MSCA could be adopted.
 - Refer to any overall threshold which must be met to be placed on the ranked list. State the minimum score to be admitted to the review stage (regardless of the number of candidates). Make reference again to the consensus meeting of reviewers (may be remote).
 - How many individuals will be called for interview from the list? (for example, 3 times the number of the positions on offer?)
 - Outline the structure of the interview: in English, oral presentation, question and answers session? Try to select a format that ensures the objectivity of the interview process.
 - Include a table outlining the interview thematic areas, assessment criteria and scoring.
 - How will the final mark for the applicant be calculated?
 - Bear in mind that an applicant could score very highly in a written application but may perform very weakly at interview and vice versa. Consider having a minimum threshold, for each selection stage (so to avoid recruiting underqualified applicants, even in the case of a low number of applications).

1.1.4 Ensure equal opportunities

Equal opportunities should be understood in its widest sense. While it is not possible for an applicant to describe fully its potential actions, its equal opportunity policies and those of its partner organisations should be summarised. The independent experts will be asked to scrutinise how these provide equality of opportunity to the researchers, equality of treatment during the selection process and equality of support, during their fellowships, to the successful researchers.

Number this section: 1.1.4 Ensure equal opportunities

Suggested Length: ~1 page

Suggested paragraphs:

- Refer to any **equal opportunities policy** within your organisation. Do the host institution(s) already have any provision in place, available to PhD students?
- Provide information on how **researchers with disabilities** are supported by the programme. The MSCA Special Needs Allowance provides financial support for the additional costs entailed recruiting researchers with disabilities whose long-term physical, mental, intellectual or sensory impairments. For more information, see page 53 in the [MSCA WP 2018-2020](#).
- **International opportunities**-Explain that the programme will be open to any prospective doctoral researcher around the world provided they stick to the mobility rule described in section 1.1.1.3.
- **Gender equality in research and innovation** (link back to section 1.1.1.1). Refer any gender equality plan here for your institution if it exists—they are developed for the institution a part of [Athena Swan](#) - refer to its objectives and any actions that will be taken as part of the plan.
- If the research area is taken up by mainly one gender then how will the programme ensure achieving a gender balance (call advertisement, gender balanced committees etc.). Say that a gender-balanced doctoral cohort might have a long-term transformative power in this regard.
- Refer to 'research at risk', i.e. researchers holding the refugee status. The European Commission have also recently launched the initiative [Science4Refugees](#) to help refugee scientists and researchers find suitable jobs that both improve their own situation and put their skills and experience to good use in Europe's research system.

1.2. Quality of the research options offered by the programme in terms of science, interdisciplinarity, intersectorality and level of transnational mobility

- Excellence of the research programme;

Number this section: 1.2.1 Excellence of the research programme

Suggested Length: ~1 page

- Provide a paragraph outlining strength of the host organisations **and/or regional/national RTD ecosystem**.
- If the beneficiary is a funding organisation, you could refer to the RTD regional ecosystem to show that your regional/national context is particularly suitable to the development of your doctoral cohort(s).
- Describe the institution(s) awarding the PhD to the applicants, making clear the link between existing expertise and the COFUND's research area. Also, a table could be used to outline the PhD research areas/topics and naming possible supervisors. While it is ok to have a pre-determined set of research topics, successful applicants should have some input in defining the final doctoral project. Ideally, the number of possible research topics should be more than the doctoral positions (in order to maximise candidates' freedom of choice).
- Mention existing training programmes, and how they could fit into the COFUND DP.
- Provide information on secondment options. Refer to section 1.2.2 where the intersectoral aspects of the project are described.
- Finish the section with a very short paragraph mentioning training and career development (linking to section 1.3.2). Mention the possibility of secondment host training where of benefit.

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

Number this section: 1.2.2 Quality of the research options in terms of interdisciplinary research options, intersectorality (mobility between the academic and non-academic sector) and international networking

Suggested Length: ~1/2 page

Break this section into three headings:

International mobility:

- Reference to mobility requirements for applicants applying to the COFUND doctoral programme (i.e. mobility rule)
- Explain if there are possible international secondment hosts, short visits and opportunities for international networking.

- If applicable, state that doctoral fellows will be encouraged to attend international conferences, both autonomously and in small teams.

Inter-sectoral exposure:

- Explain the involvement of the non-academic sector such as hosting researchers for secondments. If known at the time of the proposal, describe the non-academic organisations involved and the co-supervision arrangements.
- Mention training in non-academic specific transferable skills as part of the formal programme training programme (link here to section 1.3 where this training should be described). For example, inviting experts working in industry or other organisations from the non-academic sector to deliver courses on entrepreneurship, exploitation of research results, open science, ethics, patenting, etc. to the recruited researchers.
- Mention networking events that could be valuable to doctoral researchers (both in terms of gaining knowledge and networking opportunities) (linking to section 2.3.1).
- If known at the time of writing, mention some forms of cooperation with other doctoral programmes.
- Refer to occasions for exposing doctoral researchers to various socio-economic actors gathered in a single campus or hub.

Interdisciplinarity exposure:

- Focus here on the interdisciplinary nature of the programme. Outline how the doctoral researchers will be working with many disciplines within their host (co-supervision arrangements? Multidisciplinary research projects?)
- If applicable, explain that the doctoral researchers will receive training in advanced research skills beyond their own discipline.
- Propose shared courses or projects to the doctoral researchers from different disciplines, so to foster interdisciplinary synergies.
- Consider creating multi-disciplinary projects involving different research teams from the same or from different institutions.
- Offer possibilities for laboratory rotations or visits.

Any other relevant point

Number this section: 1.2.3 Any other relevant point

- Open Science in MSCA-COFUND is a key priority as indicated on page 11-12 in the [COFUND GFA 2019](#) and in the COFUND Expected Impacts.

- Include a section here on Open Science. You could mention the Open Science policy of the programme here and that the researchers will receive training in Open Science as outlined in section 1.3.
- Redirect the evaluator to section 2.3.3 for more detailed information.

1.3. Quality of career guidance and training, including supervision arrangements, training in transferable skills

1.3.1 Describe the supervision arrangements

Supervision arrangements, quality and experience of supervisors should be described (especially for DPs), as well as how progress of the fellows will be monitored and their career development promoted and guided.

Number this section: 1.3.1.1 Supervision arrangements, quality and experience of supervisors should be described (especially for DPs), as well as how progress on how the doctoral researchers work will be monitored and their career development promoted and guided.

Suggested Length: ~1.5 pages

Break this section up as follows:

Describe the supervision arrangements

- Describe the Number of supervisors required per applicant. Each doctoral researcher should have 2-3 supervisors: 1 primary supervisor at the host, 1 co-supervisor and 1 non-academic supervisor based in the secondment organisation.
- State that the supervisor(s) should be identified by the applicant during the application process, before the application's submission
- It would be a benefit to state that all supervisors will take mandatory mentoring training to ensure that they are properly equipped to support doctoral researcher throughout their PhD. If applicable, mention whether there is specific training provided at an institutional level, for example using Vitae resources.
- Specify that, in addition to the supervisory panel, each PhD researcher will be assigned a buddy, who will provide assistance with relocation, language (if applicable), bureaucracy..

Quality of supervisors

- Provide a collective statement on the experience main supervisors. For example, give examples of the journals they publish in (alongside journal Impact Factors).

- If possible, include a table outlining the supervisors of the centre, numbers of publications, H-index, numbers of postgraduates and postdocs mentored in the past and current postgraduates and postdocs (current mentees).

Role of the supervisor

- Outline the role of a supervisor. Use this section to briefly introduce and expand further on the Personalised Career Development Plan (PCDP). What is the ultimate goal of the PCDP? Make clear that the final goal is not only the submission of a PhD thesis, but also the holistic development of the PhD researcher.
- Detail the number of developmental objectives the doctoral researchers will be expected to achieve per year.
- How often will the PCDP be reviewed and by whom? Mention monitoring and corrective measures. Could add something about to whom and how frequently the supervisor team will report about the doctoral researcher – to the PM team or to the Advisory Board or similar. Will the doctoral researchers be required to submit annual progress reports?

Any other relevant point.

Number this section: 1.3.1.2 Any other relevant point

- If applicable

1.3.2 Describe the training

- Training on research skills within the appropriate discipline(s) and/or to gain new skills;

Number this section: 1.3.2.1 Training on research skills within the appropriate discipline(s) and/or to gain new skills.

Suggested Length: ~1.5 pages

- Begin with an overview on the main objectives of a training programme.
- Who will coordinate the training programme? Role of the project management team / supervisory board or in the case of larger COFUND Programme a specific research career development manager? (link to section 3.1.1).
- Describe how the training programme has been designed to meet the research & transferable skills' needs of these doctoral researchers and the needs of the sector.
- Mention the PCDP again (link to section 1.3.1.1).

- Include a figure/table here as an overview of the **research skills (core and advanced)** training the doctoral researchers will receive. Use graphics to highlight several research training areas.
- Include elements of the training on research skills. If possible, specify how many ECTS credits will be assigned for each activity.
 - Describe how your training elements will build upon existing programmes already running in your host institution(s) (e.g. other MSCA/H2020 projects, PhD structured modules..). List existing relevant modules (and possibly trainers and timing) in a table.
 - Supervised inter-disciplinary research project-provide a table summarising the discipline-specific research training provided by each supervisor – include name, supervisor responsible and training site. Openly refer to ‘training through research’, specifying that the ESRs will receive constant support in their research activities.
 - Scientific and transferable skills through hands on training activities.
 - Intersectoral or interdisciplinary transfer of knowledge (through secondments and short visits).
 - Summer schools/workshops for all the recruited doctoral researchers which will include specific courses on research and transferable skills. Give an overview of e.g. the summer school(s) programme(s)– include details of morning & afternoon sessions over a couple of days. Mention the transferable skills training they will receive but expand on the training in the next section 1.3.2.2

- Support and/or additional training in non-research oriented transferable skills (i.e. grant writing, project management, IPR, entrepreneurship, training for job interviews), 'open science skills' (i.e. learn researchers how to open access to their publications, manage and share their research data, be trained in ethics and research integrity, on gender balance in teams and research content, learn to communicate with the general public and to even integrate citizens in research design and processes including through citizen science);

Number this section: 1.3.2.2 Support and/or additional training in non-research oriented transferable skills

Suggested Length: ~1 page

- Describe in more detail the key transferable skills training that the doctoral researchers will receive. This should also be listed in the previous section 1.3.2.1 (with corresponding ECTS credits).

- Outline any requirements of the doctoral researchers in this area – how many modules must they complete/credits etc. These provisions should be in line to the host institution’s regulation (and when applicable to the national law).
- Evaluators will want to see that the researchers receive transferable skills in:
 - Grant writing
 - Project management
 - Intellectual Property Rights (IPR) management
 - Entrepreneurship skills
 - Training for job interviews
 - CV writing
 - Open science skills (i.e. researchers should learn how to open access their publications, manage and share their research data)
 - Public engagement & communication skills
 - Citizen science skills
 - Viva preparation training (when relevant in the national context).
- Introduce any career development support services present at the host organisation(s).
 - This could provide training in transferable skills (such as CV writing) and/or offer some tailor-made coaching.

- Any other relevant point.

Excellence Section – Examples of Strengths

- Variegated dissemination channels are proposed for the recruitment calls including the beneficiary website, professional networks, job fairs, newsletters and social media.
- Candidates are allowed to apply for more than one project.
- Experts will be asked to and sign a confidentiality statement and to declare any potential conflict of interest.
- The staff involved in the selection process will undertake unconscious bias training.
- Gender issues are considered from the call launch to the evaluation committees as well as in the working conditions. Also, other equal opportunities measures are credibly formulated.
- The program has excellent supervision modalities, as all ESRs will be assigned a primary and secondary supervisors (and an industry mentor).
- The programme is highly interdisciplinary as ESRs will have two supervisors, one from each discipline.
- The programme offers very good training options to carry out high quality research. The training on transferable skills is very suitable, with a strong focus on innovation and commercialization.
- The programme offers good quality opportunities in terms of interdisciplinarity, intersectorality and high level of transnational mobility due to the secondment and short-term research visit possibilities offered by international partners (both from academia and industry).

Excellence Section 1 – Examples of weaknesses

- The eligibility criteria and the application requirements are not fully elaborated.
- The estimated recruitment workflow might not be sufficient for getting visa and work contract permits for Third Country candidates.
- It is not adequately explained which criteria will be assessed on the different round of the selection process. Not enough information is provided on the content of the final interview.
- The number of research projects proposed is equal to the number of positions to be offered which limits the freedom of choice of the applicants.
- It is not clearly explained how many expert evaluators will be involved per application in the external evaluation process.
- Experts are affiliated to partner organisations, which undermines the impartiality of the process.
- The role of the prospective supervisor in the final selection of candidates is not clear.
- The possibility and modalities of redress are not sufficiently explained.
- The industry secondment options are described in general terms only.
- Specific role, responsibility area and mandate of the non-academic supervisor per ESRs are not satisfactorily described.

- Some of the training actions mentioned are only generally described.

2. Impact

In this section take into account the **COFUND Expected Impact** as outlined in the: [MSCA Work Programme 2018-2020](#):

At researcher level:

- Augment and diversify the set of skills, both research-related and transferable ones, that will lead to improved employability and career prospects both in and outside academia.
- Forge new mind sets and approaches to research and innovation work through interdisciplinary and intersectoral experience.
- Enhance networking and communication capacities with scientific peers, as well as with the general public, that will increase and broaden the research and innovation impact.

At organisation level:

- Increasing the attractiveness of the participating organisation(s) towards talented researchers.
- Boosting research and innovation output among participating organisations.
- Strengthening of international, intersectoral and interdisciplinary collaborative networks that will reinforce the organisation's position and visibility at a global level, but also at a regional/national level by helping them become key actors and partners in the local socio-economic ecosystems.

At system level:

- Aligning of practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), enhanced implementation of the Charter and Code and the EU Principles for Innovative Doctoral Training at regional, national or international level.
- Supporting the practice of Open Science through targeted training activities.
- Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe.
- Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.
- Strengthening of Europe's human capital base in research and innovation and structuring of a stronger European Research Area.
- Increase in Europe's attractiveness as a leading destination for research and innovation

- Better quality research and innovation contributing to Europe's competitiveness and growth, including by supporting regional or national smart specialisation strategies when appropriate.

2.1 Enhancing the potential and future career prospects of researchers; strengthening human resources on regional, national or international level

The information provided in *Italics* below relates to the expected impact outlined above. It is important to show how these Expected Impacts are achieved through the programme.

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

Number this section: 2.1.1 Describe how the potential and future career perspectives of selected researchers will be enhanced

Suggested Length: ~1 page

- **Enhancing skills** (*research-related and transferable ones*) – What aspects of the programme will allow the doctoral researchers to enhance their existing skills to *improve their employability in and outside academia* (and their ability to navigate confidently the different job markets).
- **Career prospects** – state the potential future employers of the doctoral researchers (providing specific examples) and how participating in this programme will improve their attractiveness towards these employers. State that the training programme has been developed in conjunction with industry partners, so to ensure the alignment between employers' needs and skills development.
- How will the programme **enhance networking and communication capacities** with scientific peers, as well as with the general public, that will increase and broaden the research and innovation impact?
- How will the **intersectoral and interdisciplinary aspects** of the programme impact on the researchers' careers (e.g. *forge new mind sets and approaches to research and innovation work*).
- If you are submitting a COFUND project for an existing programme, explain how the new COFUND action will improve upon your programme. Convincingly show how the COFUND action will strength your programme and therefore the professional career development of the researchers.

- Outline how the proposed programme will impact on strengthening research human resources on regional, national or international level;

Number this section: 2.1.2 Outline how the proposed programme will impact on strengthening research human resources on regional, national or international level

Suggested Length: ~1 page

Break into three sections or two if the regional and national level can be combined. In both sections you should refer, as appropriate, to the '[Salzburg Principles for Doctoral Training](#)' and to '[Salzburg II Recommendations](#)'.

Regional level/ National level

- Describe how the programme will be *increasing the attractiveness of the participating organisations towards talented researchers* thus building up talent in the region. What is the value of having more PhD holders in certain thematic areas?
- Describe how *“strengthening of international, intersectoral and interdisciplinary collaborative networks that will reinforce the organisation's position and visibility at a global level, but also at a regional/national level by helping them become key actors and partners in the local socio-economic ecosystems.”* Refer to the visibility of your COFUND DP and the ties with other PhD programmes.
- Do the objectives of the COFUND programme address any key priorities/needs at a research level?
- Describe how the COFUND programme meets the needs at a national level. For example, does the COFUND programme align with the national policies/strategies such national Research and Innovation Strategies for Smart Specialisation (RIS3 strategies)?

International level

- Highlight how the programme will impact on the *international, interdisciplinary and intersectoral mobility of researchers in Europe*.
- Describe how the programme will strengthen *Europe's human capital base in research and innovation and structuring of a stronger European Research Area* where knowledge, technology and researchers circulate freely.
- Describe how the programme will increase *Europe's attractiveness as a leading destination for research and innovation* (provide specific information in relation to the research field). Refer to the benefits of attracting talented early-career researchers.
- Describe how the programme will impact on better *quality research and innovation contributing to Europe's competitiveness and growth* and or address a European societal challenge.

- Any other relevant point.

Number this section: 2.1.2 Any other relevant point.

- If applicable

2.2 Aligning practices of participating organisations with the principles set out by the EU for human resources development in research and innovation

Describe how the programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I (such as Charter and Code¹, or the [Principles for Innovative Doctoral Training](#) for DPs) at the participating organisations;

Number this section: 2.2.1 Describe how the programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I (such as Charter and Code² and the Principles for Innovative Doctoral Training) at the participating organisations;

Suggested Length: ~1 page

- Include information here if your institution has been awarded the HR Excellence in Research Logo.
- Outline how the programme aligns with the “practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), and the Principles for Innovative Doctoral Training for DPs.
- Mention alignment with national regulations and provisions concerning social security and pension, provision for maternity/parental leave (remember that, if not explicitly prohibited by the local legislation, doctoral researchers must be employed as staff, with all the relevant benefits).
- Mention again how gender issues / researchers at risk have been considered in working conditions. Refer back to 1.1.4.
- Remind the evaluator that the proposed programme will contribute to achieving the expected impact of COFUND:
 - *Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.*
 - *Aligning of practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), enhanced implementation of the Charter*

¹ https://euraxess.ec.europa.eu/sites/default/files/brochures/am509774cee_en_e4.pdf

² https://euraxess.ec.europa.eu/sites/default/files/brochures/am509774cee_en_e4.pdf

and Code and the EU Principles for Innovative Doctoral Training at regional, national or international level.

Any other relevant point.

Number this section: 2.2.2 Any other relevant point.

- If applicable

2.3 Quality of the proposed measures to exploit and disseminate the results

Describe plans and procedures for exploitation and dissemination of results towards the research and innovation community and other relevant stakeholders (e.g. industry, other commercial actors, professional organisations, policy makers) in order to achieve and expand potential impact of the programme. This includes the strategy to be adopted to ensure open access to publications and to research data (when appropriate) as well as promoting FAIR data management;

Number this section: 2.3.1 Describe plans and procedures for exploitation and dissemination of results towards the research and innovation community and other relevant stakeholders

Suggested Length: ~1/2 page

- Describe who are the target audiences for the dissemination of the research results and progress of the COFUND projects. Provide specific examples-types of research fields (internal and external to the beneficiary and partners), industry, commercial actors, policy makers etc..
- Describe the types of dissemination activities that will be used (conferences, workshops, events, tradeshows, social media etc.). Give examples for all dissemination activities.
- A table could be included in this section indicating the specific activities, the target groups, the channels and who is the person responsible (PhD fellow, supervisor...) and requirements for each doctoral researcher.
- This table could also be included for the Communication Activities section below.
- Specify that the PhD researchers will play an active role in the dissemination and exploitation strategies. At the same time, they will be supported by the supervisor(s) and by the host's administrative structures
- Specify the minimum number of dissemination activities each ESR will be required to carry out during their PhD. Say that these targets will be included in the PCDP, and therefore periodically reviewed. Could they get any ECTS credits for these activities?

- Mention if the PhD researcher will receive training for dissemination and communication skills (refer back to the training section 1.3.2.1 for more information).
- Describe the strategy to ensure open access to publications and to research data (when appropriate) as well as promoting FAIR data management.

Intellectual Property Rights issues (if relevant);

Number this section: 2.3.2 Intellectual Property Rights issues

Suggested Length: ~1/4 page

- State that IPR will follow MSCA guidelines.
- State it will be in line with any national IP protocols.
- If IP agreements are already in place with industry partners mention this also.
- State that the IP policy will apply during the doctoral researchers stay at the host and secondment (specify that weren't an existing agreement already in place, nevertheless an IP agreement would be obligatorily signed before the beginning of each secondment).
- Mention the support of the highly experienced institutional TTO and host's dedicated support. State how often the research projects will be reviewed to look for potential IP.
- Mention that the researchers will receive training on IP management through carrying out their project and also through structured training. Refer to the appropriate section.

- Any other relevant point.

Number this section: 2.3.3 Any other relevant point.

Suggested Length: ~1/4 page

- Describe how the COFUND programme will support the practice of *Open Science* which is in line with the Expected Impact of the COFUND programme.
- Outline the programme's OPEN SCIENCE policy in detail in this section.

2.4 Quality of the proposed measures to communicate the results to different target audiences

- Communication and public engagement strategy of the programme; in particular the approach envisaged to create awareness among the general public of the research work performed under the programme and its implications for citizens and society should be described;

Number this section: 2.4.1 Communication and public engagement strategy of the programme

Suggested Length: ~1 page

- Mention the role of the host institution dedicated Education and Outreach support staff.
- Specifically mention training in communication, public engagement and education as part of the doctoral researchers training programme and direct the evaluator back to section 1.3.2. If appropriate, refer to relevant ECTS credits.
- Mention specific kinds of activities the doctoral researchers will take part in to communicate their results / interact / educate the general public – link to existing outreach and education programmes at the Centre.

Some activities the doctoral researchers might part-take in could include:

- Open Door communication: Students/public visit the doctoral researchers' institutions/labs etc.. to discuss project activities.
- Visit schools, universities, community organisations to promote their research.
- Public/societal engagement events (For example, European Researchers' Night Event).
- Articles in a newspaper about the doctoral researchers' activities and the overall COFUND programme.
- Use of the COFUND social media. Specify which social media accounts will be set up.
- Doctoral researchers writing blogs to publish on host website and COFUND website.
- Press release by the COFUND PM.
- Brochures about the project.
- E-newsletters.
- Multimedia releases (video clip via YouTube explaining the doctoral researchers work).
- Apart from communicating the research results, there is also the aspect of communicating the results of the overall programme, i.e. the outcomes of calls and information about the doctoral researchers themselves. For example, press releases about call results with details of the funded doctoral researchers, disseminating short video interviews of the doctoral researchers talking about their work.

Any other relevant point.

Number this section: 2.4.2 Any other relevant point.

- If applicable

Impact Section – Examples of Strengths

- The proposed training programme is organised in a way to have a positive impact in the ESRs career with innovative, intersectoral and international aspects, focusing not only on the development of research skills but also transferable skills.
- ESRs can undertake teaching and mentoring activities, which will positively influence their professional and personal development.
- The programme is committed to increase the number of trained female researchers in a field which has been traditionally male dominated.
- The beneficiary has already been granted the "HR Excellence in Research". There is clear commitment to consolidate the implementation of the principles of doctoral training and share good practices with the foreign partners.
- The alignment practices for Charter and Code and the European Principles for Innovative Doctoral Training are acknowledged in the proposal.
- The programme is in line with the regional and national Research and Innovation Strategies for Smart Specialisation.
- The IPR issues are dealt with appropriately. IP agreements with commercial partners are envisaged.
- The proposal highlights clear Key Performance Indicators in exploitation and dissemination targets.

Impact Section- Examples of Weaknesses

- It is not clear how principles of the Charter and Code will be implemented at the other participating organisations.
- The potential to strengthening human resources will be diminished by the fact that the program will be offered to only a small number of applicants.
- Limited explicit details are provided about the IPR strategy, and mechanisms to manage and support potential commercial exploitation are underdeveloped.
- Measurable outcomes are not fully defined for supporting the outreach activities towards the general public.
- Minimum expectations are not clear for ESR involvement in communication activities.
- The contribution and involvement of the ESRs in the media and social networks is not clearly described.

3. Quality and efficiency of the implementation**3.1 Coherence, effectiveness and appropriateness of the work plan**

Describe the management plan of the programme and the resources; [define the work packages and deliverables](#); include a timeline or Gantt chart giving an overview of at least the:

- Expected start and end date of the action (number of months);
- Number of calls;
- Opening/Closing date of the call(s);
- Number of fellowships offered per call;
- Evaluation timeline;
- Expected/planned start/end date of researchers' appointments.

Number this section: 3.1.1 Describe the management plan of the programme and the resources; define the work packages and deliverables; include a timeline or Gantt chart.

Break up into 3 headings:

3.1.1.1 Management Plan

Suggested length: ~2 pages

Use a figure to outline the organisation and management structure. Refer to the Gantt chart for the call timeline. Suggested organisation (but others may be appropriate):

- Programme Coordinator (PC).
- Programme Manager (PM).
- Centre Operations Team (Finance, grant management, research office, TTO/commercialisation, HR etc.).
- Supervisory Board (including both supervisors and doctoral researchers' representatives) – tasked with monitoring progress of the research programme, gender equality, progression issues or disputes, IPR, Communication and dissemination and risk management.
- Steering Committee- tasked with oversight and governance (see section 1.1.2.1). The Steering Committee (SC) should include both internal and external representatives, all of them qualified enough to bring meaningful input and contribution to the programme. See, as example, the following Steering Committee composition: Project Coordinator, Institutional VP of research, Directors, MSCA NCP or NE, representative from TTO and industry representative.
- Doctoral Studies committee.

Outline the responsibilities of the PC versus the PM, and regular meetings between the two. Explain the responsibilities of the various committees (could link back to 1.1.2.1 Composition of committees involved in the different stages of the process). Outline the frequency of meetings of the various committees and the decision-making processes.

3.1.1.2 Work packages & Resources

Suggested length: ~1.5 pages

- For ease of reading, move the WP tables (provided on the last page of B1) up into this section, before the Gantt chart, instead of having them at the end.

- Add two more work packages:
 - WP 5-Dissemination, exploitation and communication.
 - WP6-Training in research and transferable skills.

3.1.1.3 Gantt Chart

Suggested length: ~1/4 page

Include a timeline or **Gantt chart**. As per the COFUND GFA 2019 (p. 38), you should give an overview of:

- Expected start and end date of the action (number of months);
- Number of calls;
- Opening/Closing date of the call(s);
- Number of doctoral researcher positions offered per call;
- Evaluation timeline;
- Expected/planned start/end date of researchers' appointments.

Also include:

- Summer schools/training events
- Programme review
- PR activities for each call
- Expected submission of doctoral thesis

Post-call comms/dissemination activities of the programme

Financial management and risk management/contingency plans of the programme;

Number this section: 3.1.2

Suggested Length: ~1/2 page

3.1.2.1 Financial management

- Start with an introductory paragraph stating that financial management will follow REA regulations and guidelines on the financial implementation and management of MSCA awards and is the responsibility of the PC.
- Explain how the beneficiary is well able to manage the project due to its experience in managing other financial resources (other mobility programmes, FP7 and Horizon 2020 projects; national projects, own programmes, etc.).
- Refer to section 3.2.1 for the budget table and for the justification of the costs. When applicable, tuition fees should be budgeted.
- Describe how often the funding be distributed to all the host partner organisations.
- Name the support offices which will provide their expertise.

3.1.2.2 Risk management/contingency plans

- Include a table outlining the risks within the work package that would affect the implementation of the programme. Make sure there is a contingency plan for each risk.

Risk & Contingency Plan Table			
Risk	Work package	Risk level (low, med, high etc.)	Contingency

Any other relevant point.

Number this section: 3.1.3 Any other relevant point.

- If applicable

3.2 Appointment conditions of researchers

- Amounts that will be provided for the benefit of the researcher (e.g. living, mobility, travel and family allowances) and for the organisation that is hosting the researcher (contribution to research, training and networking costs, indirect costs) (Table 1);

Number this section: 3.2.1 Amounts that will be provided for the benefit of the doctoral researchers and for the organisation that is hosting the doctoral researchers. If possible, provide some information (even if indicative) about the take-home salary.

Suggested Length: ~1 page

Insert the budget table here.

Cost categories	EU contribution (EUR/person-month)	Total cost = EU contribution + own resources (EUR/person-month)
Living allowance	1 935 (for ESR)*	<i>The sum of living and mobility allowances must not be lower than EUR 2709 for ESR</i>
Mobility allowance**	N/A	***
Family allowance**	N/A	
Travel allowance**	N/A	
Research costs**	N/A	
Other (training, etc..) **	N/A	

Management costs	325	
Indirect costs**	N/A	
Number of fellows		
Number of fellow months		
Total amount		

Discuss the amounts for the following cost categories and why they are appropriate for the COFUND programme. Make sure to provide an estimation of the costs that would be needed (e.g. the salary of the PM, price of promotional activities etc.). Evaluators need to see that the costs indicated in the budget table make sense:

Amounts for the benefit of the researcher

- Living allowance
- Mobility allowance
- Family allowance-what is this based on (e.g. 40% of doctoral researchers might be estimated eligible for the family allowance). At what stage the eligibility for the family allowance will be determined (i.e. at the call deadline or at the time of recruitment?)? Will be possible to revise it during the lifetime of the project?

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

- **Research training and networking:** State this portion of budget will cover expenses such as consumables, research costs, travel for training/events etc., training, programme workshops, conferences... Will there be a tuition fee to pay? In case, will that apply to the whole doctoral cohort in the same way?
- **Management and indirect costs:** state these costs will be used for the PM salary, recruitment-related costs, website, advertising, call dissemination costs etc..

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

Number this section: 3.2.2 Working conditions, institutional administrative support, and available services/facilities

Suggested Length: ~1 page

Suggested points to cover:

- Human resources (mention the HR Excellence in Research Logo).

- EURAXESS and the migration support for non-EU researchers.
- Using a table outline all the support services / facilities in all the organisation locations.

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

Number this section: 3.2.3 Employment conditions, including statutory working practices, social security coverage and social benefits

Suggested Length: ~1/2 page

- Describe the contracts that will be provided to doctoral researchers (if not explicitly prohibited by the national legislation, they should be employed as staff).
- Describe statutory working practices, social security coverage and social benefits (sick leave, maternity/paternity and parental leave).
- Highlight that, as staff members, doctoral researchers will be subject to relevant employment laws e.g. equal status act, employment equality acts, disability act.

- Compare the proposed working conditions proposed through the programme with the regional and/or national and/or sectoral ones;

Number this section: 3.2.4 Compare the proposed working conditions proposed through the programme with the regional and/or national and/or sectoral ones

Suggested Length: ~2-3 paragraphs

- Particularly highlight any area where the programme will go beyond national legislation requirements e.g. full maternity pay (topping up the state maternity payment).
- How do these working conditions compare with the standard treatment of PhD researchers in your country? Are they treated as staff or students? Remember that the conditions offered by COFUND DP should not be worse than the average national conditions (possibly, they should be better).

- Any other relevant point.

Number this section: 3.2.4 Any other relevant point.

- If applicable

3.3 Competence of the participant to implement the programme

- Description of how the administrative, technical and human resources will be used to implement the programme.

Number this section: 3.3.1 Description of how the administrative, technical and human resources will be used to implement the programme.

Suggested Length: ~2-3 paragraphs

- Give the experience of the PC and other steering committee members in FP7, H2020 and MSCA funding – take care to highlight in particular the EU funding and project management experience of the PC.
- Outline the experience required for the role of PM – if you have already identified a PM, briefly mention his/her profile and relevant experience.
- List by name every other host organisation institutional staff who will support the PM e.g. finance officers, graduate studies officers, HR staff, education/outreach managers, business development managers, TTO staff, marketing team etc..

If known, description of [partner organisations](#) hosting and training the researchers and contributing financially to the programme (if applicable);

Number this section: 3.3.2 If known, description of partner organisations hosting and training the PhD researchers and contributing financially to the programme (if applicable);

Suggested Length: ~1-2 paragraphs

Refer to the overview of all the identified Partner Organisations in **Table 2** and the Letters of Commitment in Section 5.

- Describe the organisations that will be recruiting and hosting researchers. Mention if they will also provide training and financial contribution.
- Describe the organisations who will be hosting researchers without recruiting (for example, non-academic organisations who will be taking researchers on secondments). Mention if they will also provide training and contributing financially.
- Describe any other involvement of partner organisations.

- Support offered to candidate researchers during the application/ recruitment/ implementation;

Number this section: 3.3.3 Support offered to candidate researchers during the application/recruitment/implementation

Suggested Length: ~1/2 page

Explain the support offered to the doctoral candidates at each stage of the selection, recruitment and implementation process:

Application process-refer back to all the information provided to applicants (1.1.1.2), helpdesk, support provide from supervisors and the host institutions.

Recruitment process-what support services and process will be used upon recruitment. The researchers will be moving to the host country so state what support will they receive to integrate into their host country (e.g. EURAXESS services to support researchers).

Implementation process- what support will be offered to doctoral researchers once they are appointed (induction day, supervisory support, communication platforms etc.). How will it be ensured that, in spite of training and outreach duties, all the doctoral candidates will be supported in the task of finishing their PhD on time?

- Any other relevant point.

Number this section: 3.3.4 Any other relevant point.

Suggestion:

- It is important to include how the projects and the researchers will be monitored. For example, explain the monitoring of the individual doctoral projects and how the programme will be assessed.

Table 1. The following table (or similar) should be used to detail the financial aspects of the programme. Please note that the amounts for the living allowance and for the mobility allowance must be specified individually:

Cost categories	EU contribution (EUR/person-month)	Total cost = EU contribution + own resources (EUR/person-month)
Living allowance	1 935 (for ESR)* 2 740 (for ER)*	***
Mobility allowance**	N/A	***
Family allowance**	N/A	
Travel allowance**	N/A	
Research costs**	N/A	
Other (training, etc..) **	N/A	
Management costs	325	
Indirect costs**	N/A	

Number of fellows		
Number of fellow months		
Total amount		

*Choose the applicable rate, and delete the other.

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

*** The sum of living and mobility allowances must not be lower than EUR 2709 for [ESR](#) and EUR 3836 for [ER](#).

The following work packages and pre-filled deliverables are mandatory, and constitute a minimum requirement (you are welcome to add work packages and to enhance these deliverables and to add additional ones).

Work package number	1	Start date or starting event:	
		Final date:	
Work package title	Management		

Deliverables D1.1 Progress Report
--

Work package number	2	Start date or starting event:	
		Final date:	
Work package title	Dissemination of the Programme and its Calls		

Deliverables D 2.1 Report/s on communication and dissemination activities D 2.2 Inform for each call the Project Officer by sending the link to the EURAXESS website where the Call has been published
--

Work package number	3	Start date or starting event:	
		Final date:	
Work package title	Evaluation and Selection		

Deliverables D3.1 Report for each call on evaluation and selection

...

Work package number	4	Start date or starting event:	
		Final date:	
Work package title	Ethics Issues		

Deliverables

D.4.1 Report for each call on ethics issues

.....

Implementation Section – Examples of Strengths

- The risk analysis is suitable developed. The mitigation measures are appropriate.
- The appointment conditions of ESRs, including parental leave, are satisfactory.
- The Management Board’s and Steering Committee’s members, who are clearly identified, are appropriate to deliver this project.
- The description of the competence and expertise of the key personnel and organisations involved in the implementation of the various aspects of programme is appropriate.
- The beneficiary has good previous experience in the management of larger collaborative project, PhD programmes and EU programmes.
- There is a broad network of suitable partners (academic and non-academic) that are committed to support the project implementation.
- Candidates will be offered good support through all phases of application, recruitment and implementation.
- ESR’s will receive an extensive induction to facilitate their smooth integration in the host institution. ESRs will be supported at all stages of the doctoral programme.

Implementation Section- Examples of Weaknesses

- There are some inconsistencies in the description of the implementation of the programme, as the Gantt chart does not fully match the Work Plan description.
- It is not completely clear if the time allocated for the selection and recruitment of researchers will be sufficient to implement all the envisaged evaluation and selection procedures. In particular, the time allocation for formalities related to hiring non-European students is insufficiently considered in the schedule.
- The risk of potential conflict between the student and supervisor is not explicitly taken into consideration and a mitigation measure is not provided.
- The management structure is overly complex and involves large numbers of committees and boards whose roles are not adequately described.

- Costs for secondments, travel expenses, conference fees etc. are insufficiently presented in the budget breakdown, limiting, potentially the attractiveness and financial feasibility of the programme

STOP PAGE COUNT – MAX

4. Ethics Aspects

All research activities in Horizon 2020 must respect fundamental ethics principles, including those reflected in the Charter of Fundamental Rights of the European Union³ and the relevant ethics rules of H2020. These principles include the need to ensure the freedom of research and the need to protect the physical and moral integrity of individuals and the welfare of animals.

Ethics is important for all research domains. Informed consent and confidentiality are as important for a sociological study as they are for clinical research.

In this context, please be aware that it is the applicants' responsibility to identify any potential ethics issues, to handle the ethics aspects of their proposal, and to detail how they plan to address them.

For COFUND programmes it is often not known in advance if the fellowships to be funded will raise ethics issues. Therefore, it is important to describe how the proposal meets the European as well as the national legal and ethics requirements of the country or countries where the tasks raising ethics issues are to be carried out. In particular, applicants should take care to describe the ethics procedures that they will enforce in the execution of the programme (at application phase, selection and evaluation phase, monitoring and follow-up of projects, and the trainings on ethics). A report on ethics issues will be produced by the beneficiary for each call it organises.

In practice, this means that the successful COFUND programmes, when opening their calls for proposals, will have to detail the procedure to be followed for addressing proposals raising ethics issues.

5. Letters of Commitment from Partner organisations

Please fill in the overview of all the identified Partner Organisations in **Table 2**.

Please use this section to insert scanned copies of the letters of commitment from the [partner organisations](#).

The [partner organisations](#) identified in the proposal must provide a letter of commitment specifying their precise role in the programme, as well as the amount of their financial contribution if any.

5. Letters of Commitment from Partner organisations

- Make sure to provide the organisation logo.

³ Charter of Fundamental Rights of the European Union, 2000/C 364/01.
See also http://www.europarl.europa.eu/charter/default_en.htm

- The organisation should provide the specific detail of their role in the COFUND as indicated in Table 2 below:
 - **Hosting researchers without recruiting** (e.g. the organisation will host X number of researchers on secondment for X duration).
 - **Recruiting and hosting researchers** (the organisation will host, supervise and support the doctoral researchers).
 - **Providing training/career development opportunities** (e.g. some partners might provide some form of training to the whole COFUND's doctoral cohort).
 - List the other forms of support that partners might provide to researchers i.e. access to equipment, training in new techniques etc..

Table 2. The following table should be used to list and detail the role of the partner organisations (if known), including their financial contribution to the programme (when applicable):

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

Note that:

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

END PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

**Co-funding of regional, national and
international programmes (COFUND)**

Call: H2020-MSCA-COFUND-2019

PART B

“PROPOSAL ACRONYM”

This proposal is to be evaluated as:

[DP] [FP]

[delete as appropriate]