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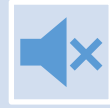
Marie Skłodowska-Curie Actions Staff Exchanges

An Introduction

mariecurie-uk@ukro.ac.uk

21 November 2023

Housekeeping



All participants will be muted for the duration of the webinar.



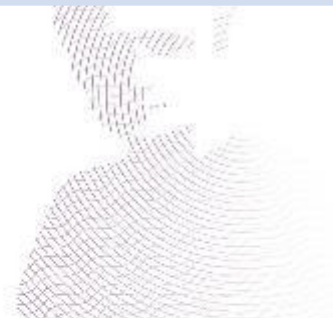
A chat function is available and will be monitored.



The session is **recorded**



Please use the Q&A function to submit questions. Up voting is available



Agenda

- 1 Welcome and Introduction**
- 2 MSCA Policy Overview**
- 3 Introduction to Staff Exchange**
- 4 Eligibility Criteria**
- 5 Calculating the Budget**
- 6 Question and Answer**



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About UKRO

We support UK based organisations involved in EU R&I

- Maximise UK participation in Horizon Europe
- A Brussels-based team of advisors
- Part of UKRI's wider International team
- [UKRO Portal](#)
 - Dedicated news articles, events and factsheets to support participation
 - Alerts to upcoming opportunities and call updates
- UK National Contact Point
 - [European Research Council](#), [Marie Skłodowska-Curie Actions programmes](#), [Widening Participation](#) and [COST](#)



Dedicated MSCA, ERC, WIDERA and COST Resources

[Sign up for NCP newsletters](#) delivered to your inbox

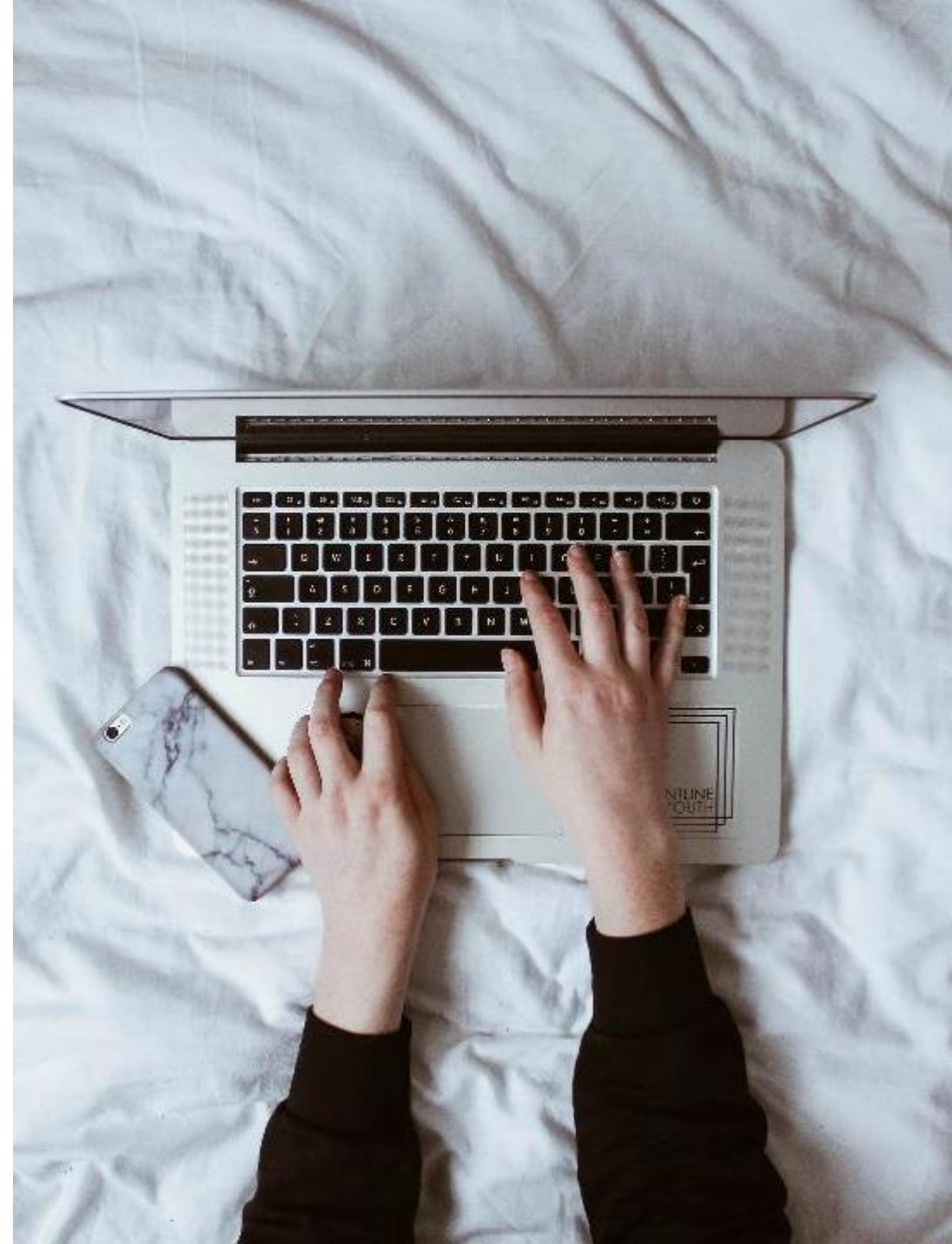
Register for an event on the [UKRO events page](#)

Find out more about [MSCA, ERC, WIDERA and COST funding opportunities](#)

Contact the National Contact Points



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UK's Relationship with the EU

Participation on Horizon Europe



Horizon Europe Participation

UK Association

On 24 December 2020, the negotiations on the [UK-EU Trade and Cooperation Agreement](#) concluded

Included the intention of the UK to associate to Horizon Europe

[Announcement on 7 September 2023](#), **confirmed association to Horizon Europe and Copernicus programmes from 1 January 2024**

This includes full participation in the programme (except for the EIC Accelerator Investment Fund)

UK entities can participate in/coordinate projects and receive funding from Horizon Europe

[UKRO website provides latest information](#) on UK participation



What Does this Mean for Staff Exchanges?

For the 2023 MSCA Staff Exchange call the [EC Transition Measures Apply](#)

At the proposal stage UK based organisations and researchers can

- Can coordinate the project
- Can participate as send and receive staff

If successful UK beneficiaries will

- Become Associated Partners during the grant agreement preparation phase
- No longer be able to coordinate the project
- Will be funded by the [UK government's Horizon Europe guarantee](#)

Introduction to MSCA

Policy Overview



Horizon Europe

Pillar 1: Reinforcing and extending the excellence of the Unions science base



* The European Institute of Innovation & Technology (EIT) is not part of the Specific Programme



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Marie Skłodowska-Curie Actions

MSCA sets out to

- Equip researchers with new knowledge and skills through mobility and training
- Create impact on researchers, institutions and systems
- Contribute to EU priorities through a bottom-up approach
 - European Green Deal objectives
 - The Climate Action target of Horizon Europe
 - The European Research Area (ERA)
 - The European Education Area (EEA)



How Does MSCA Do This?

- Encourages people to become researchers and innovators
- Equips researchers with the necessary skills and international experience
- Supports long term employability
- Develops attractive career opportunities
- Fosters an innovation and develop entrepreneurial mindset
- Promotes the EU's global attractiveness for talents

Enhance skills of people behind research and innovation

Contribute to excellent research - Bottom-up approach

Mobility (International, intersectoral and interdisciplinary)

Attractive Working and employment conditions

Structuring effect on organisations

Strong collaboration with industry, SME and other non-academic sector actors



Supporting Discovery, Ideas, People and Organisations

Horizon 2020 in Numbers



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MSC Actions

Doctoral Networks

- Supports doctoral programmes, developed by universities, research institutions and research infrastructures, businesses including SMEs, and other socio-economic actors from different countries across Europe and beyond.

Postdoctoral Fellowships

- Enhances the creative and innovative potential of researchers holding a PhD.

Staff Exchanges

- Promote innovative international, inter-sectoral and interdisciplinary collaboration in research and innovation.

COFUND

- Co-finances new or existing doctoral programmes and postdoctoral fellowship schemes.

MSCA and Citizens

- Aims to bring research and researchers closer to the public at large, to increase awareness of research and innovation activities and to boost public recognition of science and research education.



Key Features of the Different Actions

- Operates on a 'bottom-up' basis – **any subject area**
- From basic research through to near market take-up
- **3 I approach to mobility** - interdisciplinary, intersectoral and international
- Enhance skills of people behind research and innovation
- **Gender Friendly and Inclusive** – equal opportunities in the research content
- Dissemination and public engagement - public outreach



Enhance skills of people behind research and innovation

Long term employability

Encouraging people to become researchers and innovators

Equip researchers with the necessary skills and international experience

Foster innovation and develop entrepreneurial mindset

Promote the EU's global attractiveness for talents

MSCA Staff Exchanges

HORIZON-MSCA-2023-SE-01



Policy Overview

HORIZON-MSCA-2023-SE-01



Call details

MSCA Staff Exchanges 2023 (HORIZON-MSCA-2023-SE-01)

Indicative timeline

Call opens	5 October 2023
Call deadline	28 February 2024 4pm UK time (5pm Brussels time)
Notification of results	June/July 2024
Earliest project start date	November 2024
Budget	EUR 78.5 million

Call documents (**guide for applicants, MSCA work programme** etc) and submission system available on the [MSCA Staff Exchange 2023 call page](#)

MSCA Staff Exchanges

Collaborative R & I project implemented through secondments

Maximum duration is 4 years, 360 person months

- Building new & developing existing networks & collaborations
- Increasing global cooperation
- Increasing collaborations between sectors (including SMEs)
- Enhancing knowledge transfer between participants
- Building Long-term collaborations
- Developing research and transferable skills
- Supporting long-term employability
- Encourages three dimensions of mobility: inter-sectoral, international and interdisciplinary
- Sharing of knowledge and ideas for the advancement of science and the development of innovation



Objectives of Staff Exchange

Facilitated by mobility

1. International, inter-sectoral and interdisciplinary mobility of R&I staff (“secondments”)
2. Knowledge transfer between participating organisations
3. Collaboration between the academic and non-academic sectors (including SMEs)
4. Cooperation across the globe



Mobility

Through secondments

- The partners (consortium) contribute directly to the implementation of a joint R&I project by seconding and/or hosting eligible staff members.
- Such a project should go beyond previous work and generate or strengthen long-term collaborations.
- Secondments must always take place between legal entities independent from each other
- The secondments must be essential to achieve the joint project's R&I activities

Dimensions of mobility

- inter-sectoral
- international
- interdisciplinary



Benefits of Getting Involved

Staff Members

Develop transferable skills and competencies

Increase employability and career prospects

International exposure

Enhance existing and build new collaborative networks

Organisations

Transfer of knowledge

Increase R&I capacity

Develop and build sustainable international partnerships with partners all over the world

Build and enhance intersectoral relationships

Attract top researchers

Expected Impact

Staff Members

- Develop transferable skills and competencies
- Increase employability and career prospects
- Develop entrepreneurial mind-sets
- Enhanced networking and communication capacities
- International exposure
- Enhance existing and build new collaborative networks

Organisations

- Transfer of knowledge
- Increase R&I capacity
- Develop and build sustainable international partnerships with partners all over the world
- Build and enhance intersectoral relationships
- Innovative ways of cooperation and transfer of knowledge between sectors and disciplines

The Project

Applicants free to choose their own topic and subject area

- Have clear research and innovation objectives and deliverables
 - **Secondments should be essential to achieve the joint project's R&I activities**
- Exploit complementary competences of the participating organisations
- Supports networking activities and the organisation of workshops and conferences
- Facilitate sharing of knowledge and testing of innovative approaches for specific R&I topics
- Create synergies between partners
- Offer new skills acquisition and career development perspectives

All countries and nationalities can participate

All institutions fulfilling the requirements of the Horizon Europe Rules for Participation can participate

Project implemented through the **secondment of staff for a period between 1 and 12 months**

The maximum size and duration is **360 person months over 4 years**

Consortium is composed of **beneficiaries in EU MS/AC and third country associated partners**



Eligibility

HORIZON-MSCA-2023-SE-01



Eligibility

Broken down into three categories

1. Eligibility of the consortium (participants)
2. Eligibility of the staff going on secondment
3. Eligibility of the secondments



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Eligible Participants

Any legal entity established in the academic or non-academic sector.

Consortium minimum:

- 3 different legal entities established in 3 different countries
- 2 of which must be based in different EU member states or associated countries
- If the organisations are from the same sector, at least 1 must be from a Third Country

Academic sector

- Public or private higher education establishments awarding academic degrees, public or private non-profit research organisations and International European Research Organisations (IERO)

Non-academic sector

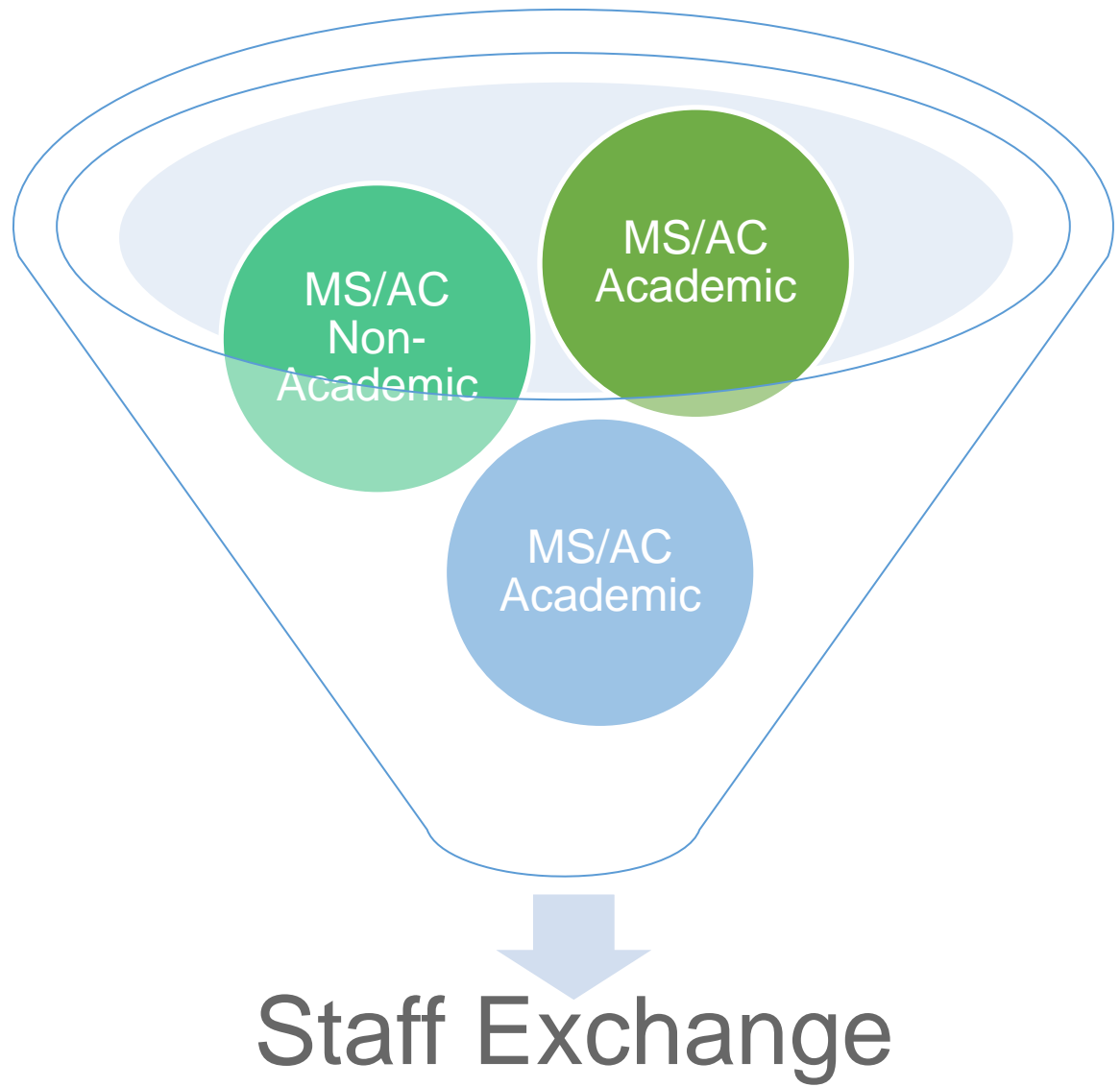
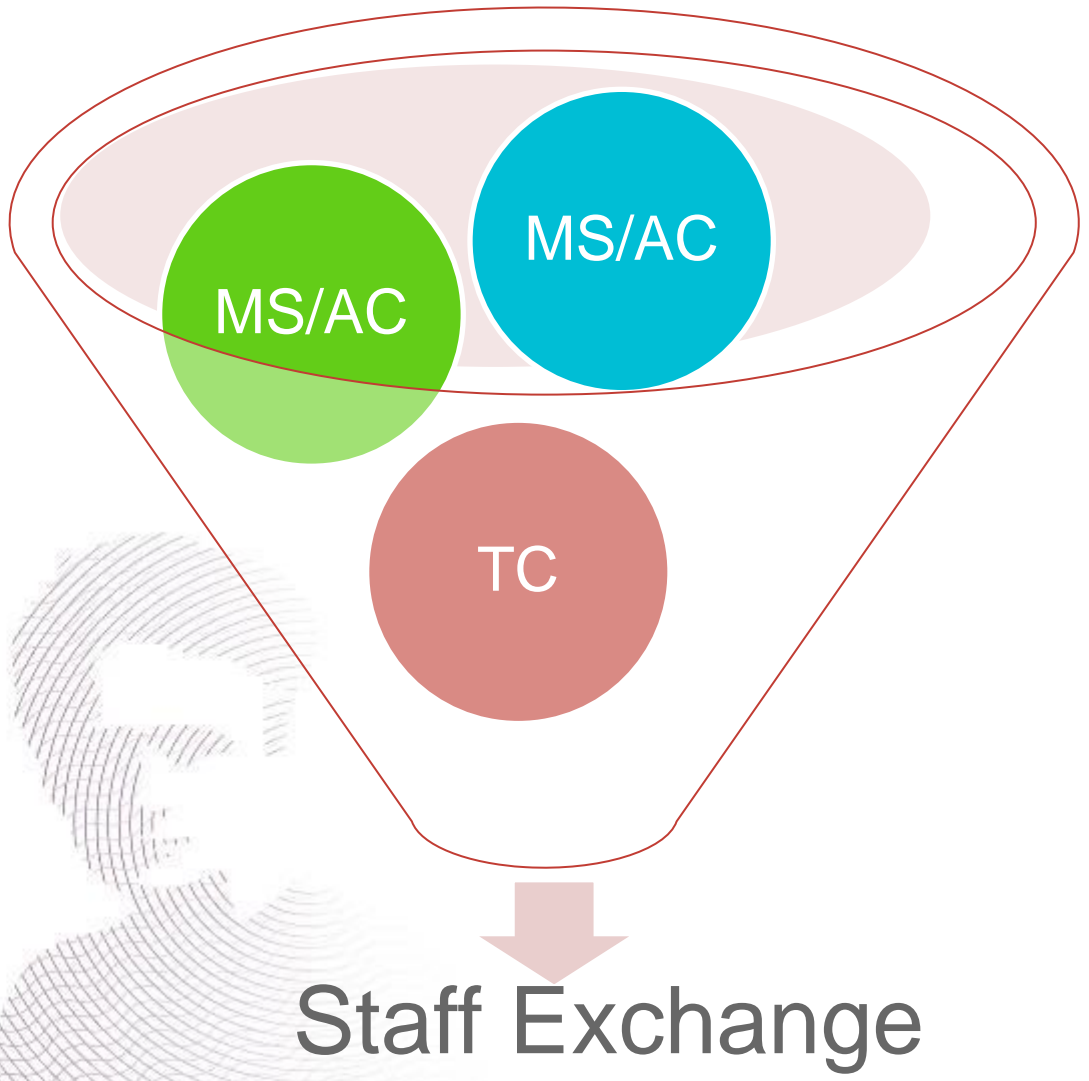
- Any socio-economic actor not included in the academic sector and fulfilling the requirements of the Horizon Europe (HE) Rules for Participation

Academic vs Non-Academic

- Determined by EC during the validation process
- Important to check with the organisation in advance to understand which sector they are in.



Consortium Composition



Consortium Composition

No 'typical' consortium size

- Range from 3 to > 20 organisations
- Depends on the need of the individual project
- Two types of participants: beneficiaries and associated partners
- Recommended between 6 to 10 organisations
- Number of associated partners should be reasonable and in-line with project size

Beneficiary

- Located in a EU Member State or associated country
- Can send staff on secondments
- Can host seconded staff
- Can provide training opportunities

Associated partners

- Located in a Third Country (TC)
- Can host seconded staff
- Can provide training opportunities
- Can send staff on secondments (specific funding eligibility rules apply)



Seconded Eligibility

Staff going on secondment must meet specific criteria

- Be under the direction and instructions of the sending organisation for the duration of the secondment
- Actively engaged in or linked to research/innovation activities for at least 1 month prior to first secondment (pro-rata for part time)
- Have the appropriate experience to undertake the activities
- Must work full time while on secondment

E.g. PhD students, technical staff, research assistants, postdoctoral researchers, senior researchers, managerial and administrative etc



The secondments

Key Features

- A secondment must last between 1-12 Months
- Counted from the day of departure to the day of return
- At least one month must be completed, after which funding is pro-rata
- A secondment may be split into several stays with one or several beneficiaries or associated partners
- Staff must work full time on secondment, even if normally they work part time.
- An in-built return mechanism must be foreseen
- Can be in different reporting periods (but only claim in one)



Secondment Eligibility

- ❖ Intersectoral and international secondments are encouraged
- ❖ Up to 1/3 of the total secondments can be within the same sector (if they are interdisciplinary)

Eligible Secondments

- From a MS/AC institution to a TC institution – any sector
- From academic to non-academic institution in a MS/AC
- From non-academic to academic institution in a MS/AC
- From a TC institution eligible for EC funding to MS/AC institution - any sector
- Between MS/AC institution in the same sector - must be interdisciplinary (max 1/3)



Secondment Eligibility

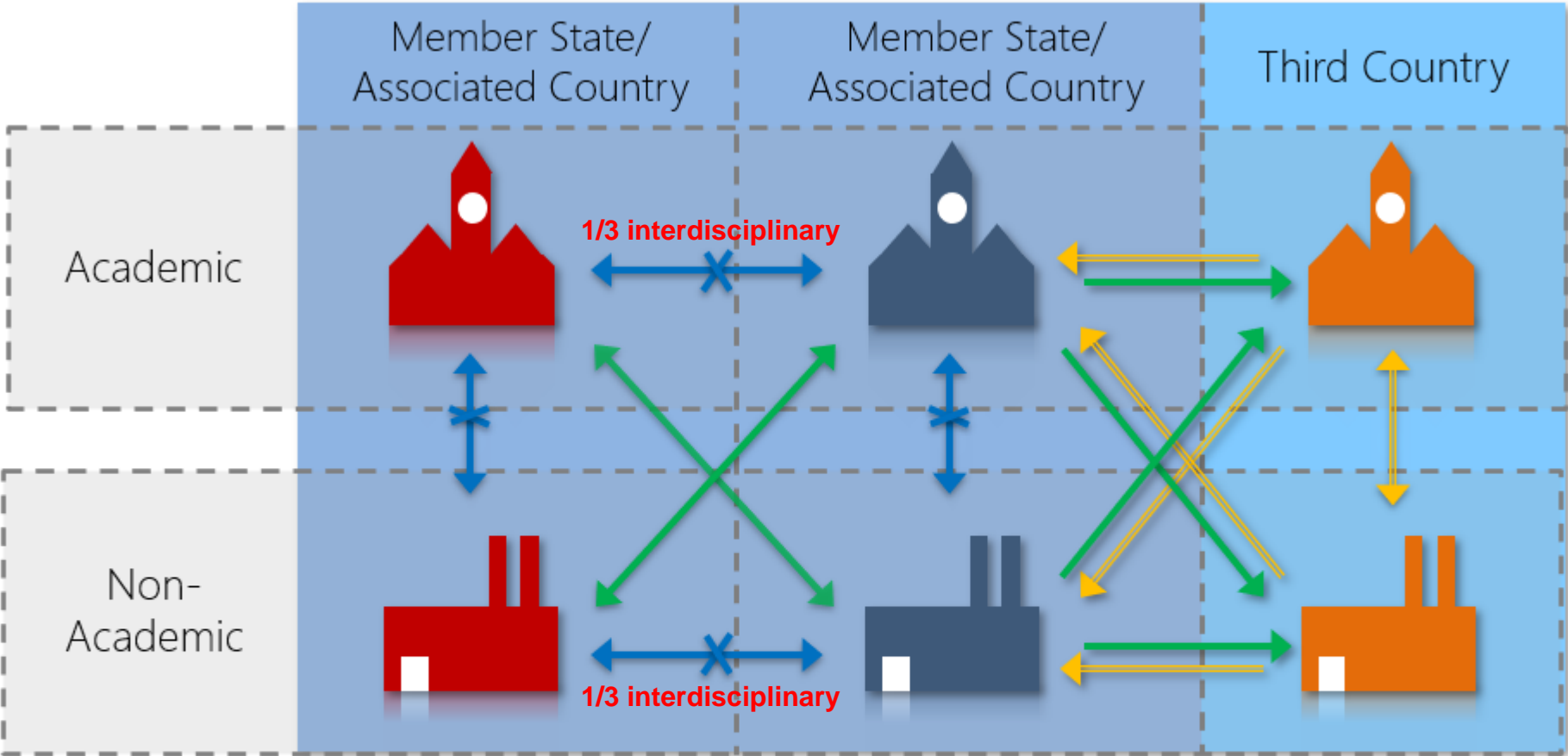
		"HOSTING" (receiving seconded staff members)		
		Academic organisation in MS/AC (1)	Non-academic organisation in MS/AC (2)	Organisation in TC*
"SENDING" (seconding staff members from organisation)	Academic organisation in MS/AC (1)	$\frac{1}{3}$	✓	✓
	Non-academic organisation in MS/AC (2)	✓	$\frac{1}{3}$	✓
	Organisation in TC*	✓	✓	✗

$\frac{1}{3}$ This symbol refers to same sector secondments up to 1/3 of the total implemented secondments funded by the EU as long as they are demonstrated to be interdisciplinary.




* denotes TC partners that are eligible for automatic funding

- up to 1/3 of the total secondments EC funded can be between Member States/Associated Countries within the same sector.

Secondment Eligibility



Minimum of three countries (MS/AC/TC)
 Secondments must be intersectoral or outside EU
 Any staff members/researchers/students can be seconded

-  EU Funded
-  Invalid Secondments
-  3rd Country Funded Secondments

Interdisciplinary Secondments

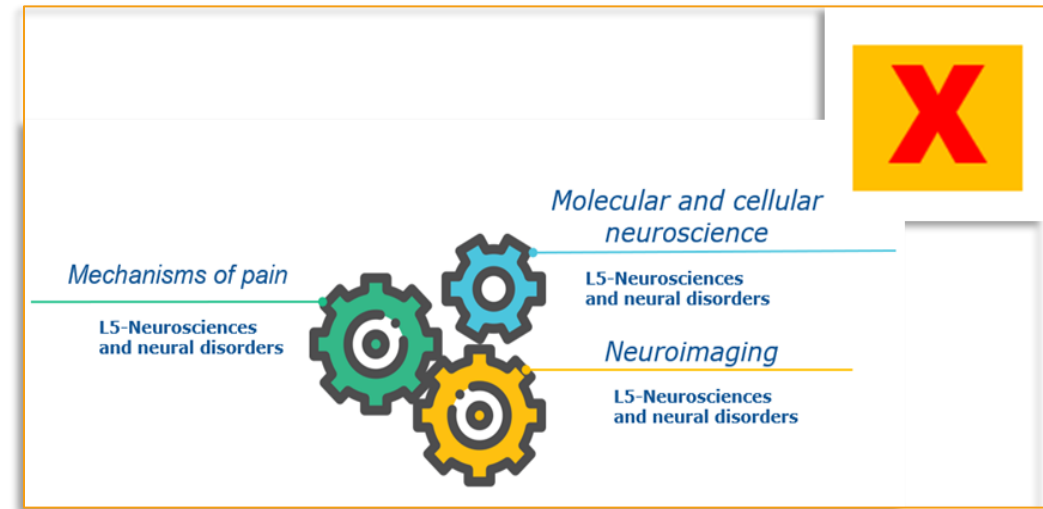
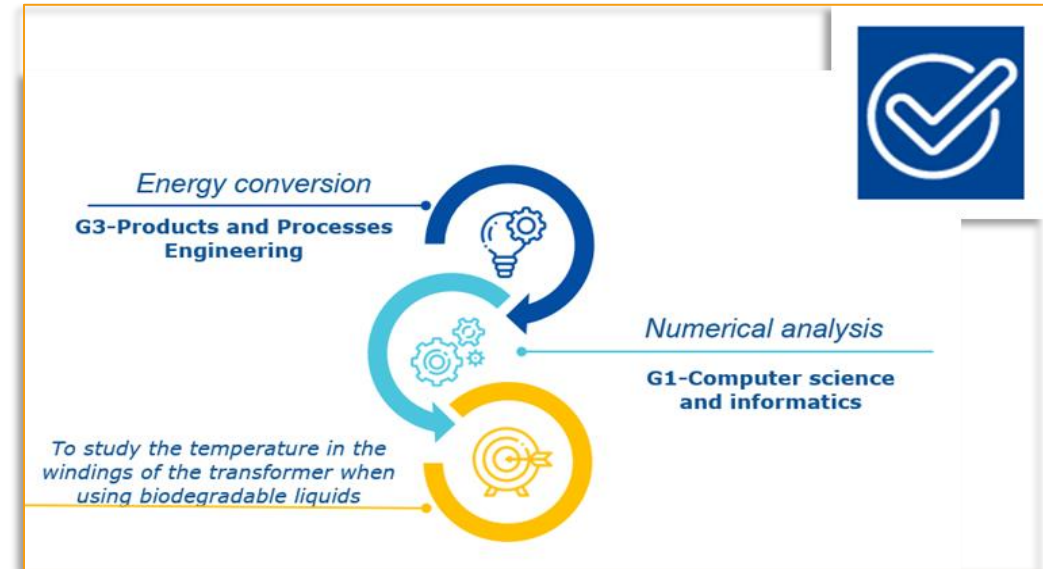
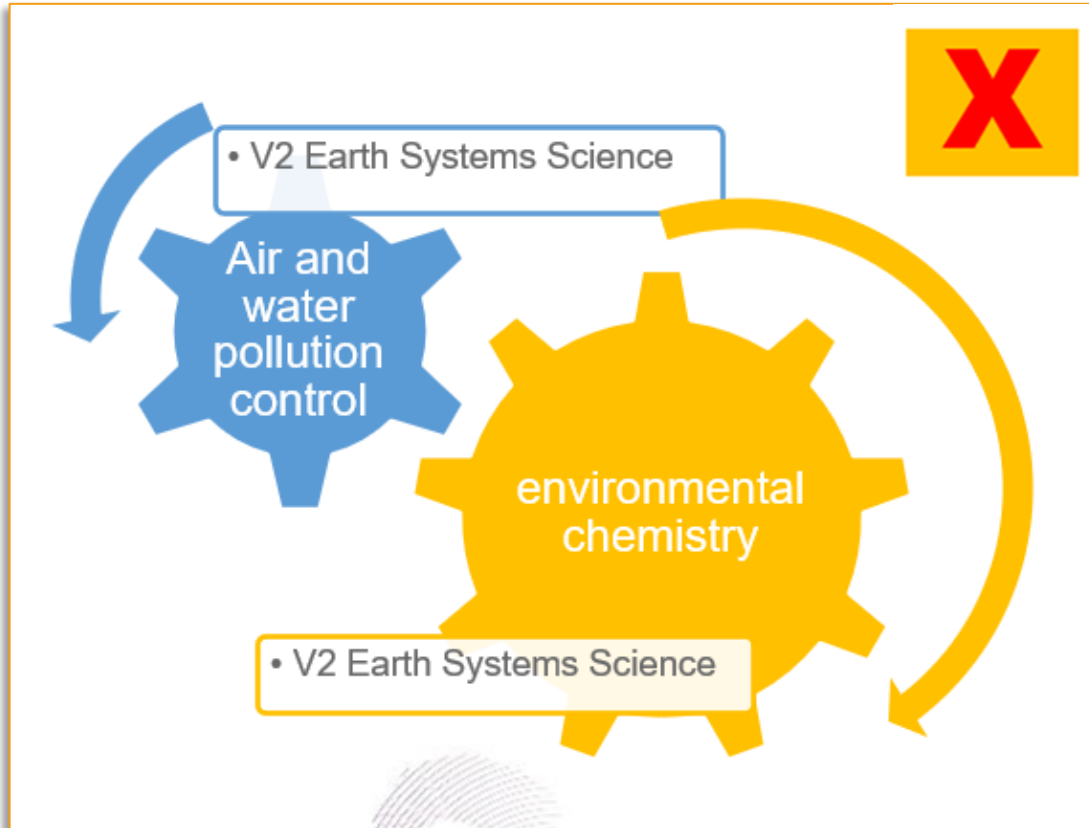
Up to 1/3 of the total secondments

Considered interdisciplinary if:

- The activities undertaken during the secondments are **from two or more different scientific disciplines**
- Based on the level 1 [MSCA key words](#) used in part A of the proposal
 - *Look at the level 2 key words and then look at which level 1 key word they fall under*
 - [Dedicated FAQ 17021](#)

MSCA KEYWORDS		
Scientific panel	Level 1 keywords	Level 2 keywords
Chemistry (CHE)	C1-Inorganic Chemistry	Catalysis Coordination chemistry Inorganic and nuclear chemistry NMP Non-Metallic Materials & basic processes Organometallic chemistry Radiation and nuclear chemistry
	C2-Organic, Polymer and Molecular Chemistry	Carbohydrates Combinatorial chemistry Heterocyclic chemistry Macromolecular chemistry Molecular architecture and structure Molecular biology Molecular chemistry Natural product synthesis Organic chemistry Organic reaction mechanism Peptide chemistry Polymer chemistry Stereochemistry Supramolecular chemistry Synthetic Organic chemistry
	C3-Physical and Analytical Chemistry	Analytical chemistry Chemical instrumentation Chemical reactions: mechanisms, dynamics, kinetics and catalytic reactions Chemistry of condensed matter Chromatography Colloid chemistry Corrosion Crystallography and X-ray diffraction Electrochemistry, electro dialysis, microfluidics, sensors Forensic chemistry Heterogeneous catalysis Homogeneous catalysis Ionic liquids Mass Spectrometry Method development in chemistry Microscopy

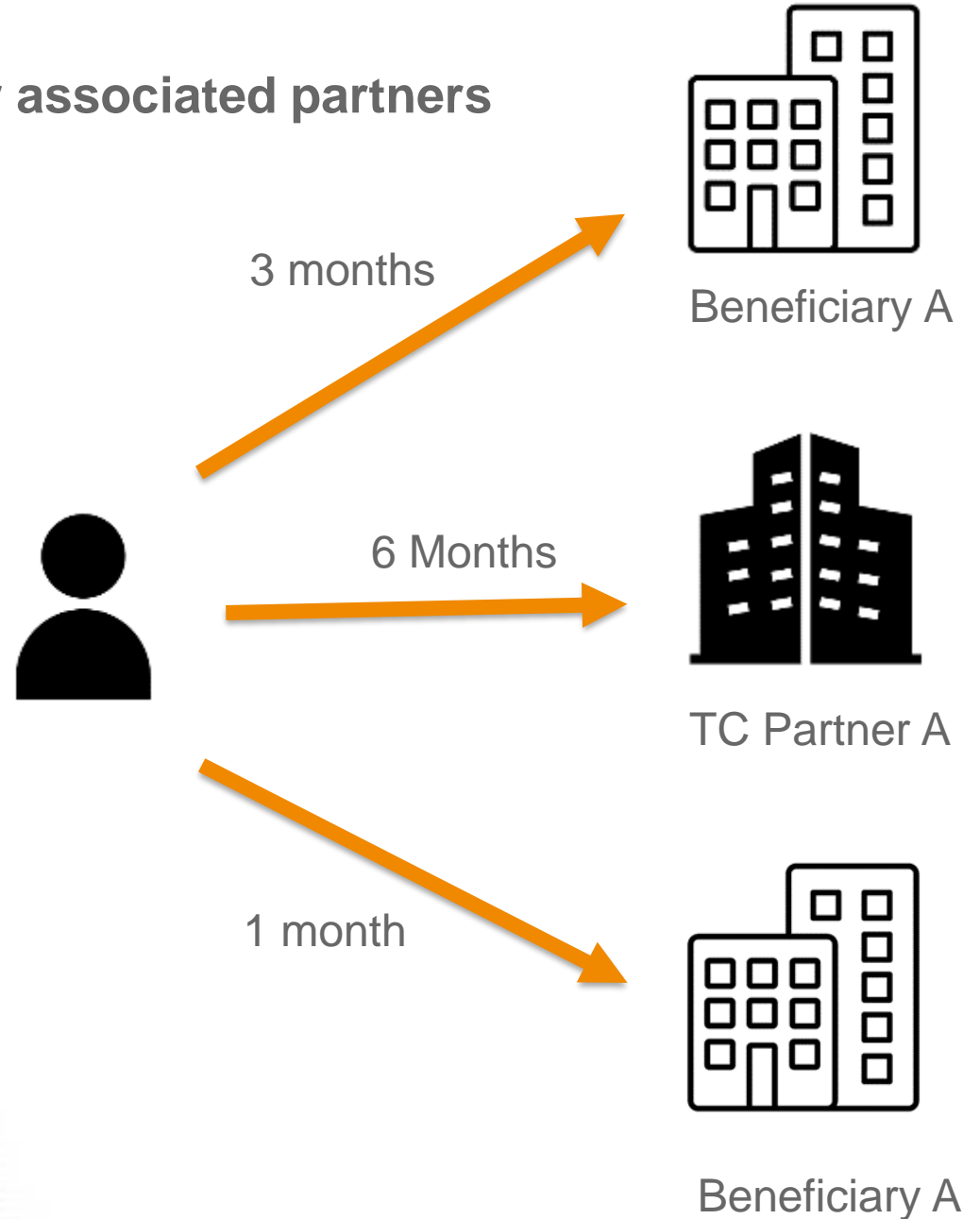
Interdisciplinary Examples



Split secondment

Can be split between one or several beneficiaries or associated partners

- Must still respect the maximum and minimum duration rule
- All the secondments must take place within the duration of the action
- At least one month must be completed, after which funding is pro-rata



Funding

HORIZON-MSCA-2022-SE-01



What does it Funding ?

Maximum EC funding: 360 person months

Funding is not meant to replace salaries of seconded staff

- unit costs are meant to cover the travel, accommodation and subsistence and other costs associated with the secondment/exchange

Funding not based on real costs

- Use of unit costs. One unit = one month of eligible staff

Country coefficient

- Does not apply

Full amount can be used flexibility

- But the researcher **MUST** receive the full amount of the researcher allowance

No detailed financial reporting

- Report on completed secondment months

TC participants from low- to middle-income countries are automatically eligible for EC funding



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Ensure all participants understand the financial rules

What is funded

Maximum EC funding: 360 person months



Employers must continue to pay staff member's salary during their stay abroad.

EC Funding

At least one month must be completed, after which funding is pro-rata (counted from the day of departure to the day of return)

Contributions for recruited researchers Per person-month		Institutional unit contributions Per person-month	
Top-up Allowance	Special Needs Allowance	Research, training and networking contribution	Management and indirect contribution
EUR 2 300	Requested unit x (1/number of months)	EUR 1300	EUR 1000

- Funding based fully on unit costs, multiplied by requested person months spent on secondments
- Institutional costs depend on implementation of secondments
- No detailed financial reporting but need to report on completed secondment months (explain how unit costs work to your financial department)
- Ensure all participants understand the financial rules



The Funding Categories

Top-up allowance for the seconded staff member

- contributes to travel, accommodation and subsistence costs related to the secondment
- Must be fully used for the benefit of the seconded staff members
- Paid according to usual internal policies (the amount can be managed by the institution or paid directly to the researcher; in accordance with national rules)

Special Needs Allowance contributes to the additional costs incurred by staff members with physical, mental, intellectual or sensory impairments

- EUR 3 000, EUR 4 500, EUR 6 000, EUR 9 500, EUR 13 000, EUR 18 500, EUR 27 500, EUR 35 500, EUR 47 500 and EUR 60 000

Research, training and networking unit cost

- contributes to the costs for training, transfer of knowledge and networking activities, as well as research expenses

Management and indirect unit cost

- contributes to the beneficiary's costs in relations with the action
- generally 'top-sliced' by the coordinator to cover network wide activities

How does the funding work in practise?

If the secondment is not implemented none of the 3 categories are paid.

Beneficiaries declare for:

- Outgoing secondments of its own staff
- Incoming secondments from a TC partner (if eligible for funding)

If agreed by the consortium, a different distribution of institutional costs

- shouldn't be reported in the financial statements



Declaration of costs

Who is responsible?

- **Beneficiaries declare all costs in individual financial statements for:**
 - Outgoing secondments of its own staff
 - Incoming secondments from a TC partner (if eligible for funding)
- **Beneficiaries must complete a mobility declaration for:**
 - Outgoing secondments of its own staff
 - Incoming secondments from a TC partner (if eligible for funding)

*If you are hosting staff from partner Third Country organisations eligible for funding, **you are responsible** for declaring costs linked to incoming secondments.*

Check the eligibility of seconded staff members.

Retain evidence for potential audit.



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Funding For Associated Partners hosting Secondments

Associated Partners hosting secondments can receive funding to cover research costs

- Funding will come from the beneficiary sending the staff on secondment
- Available funding is based on the SE unit costs
- May also include contribution to management and indirect (overheads)
- Amount available will depend on the arrangement with the sending beneficiary

If providing network wide training and networking activities may be to receive funding from the coordinator to cover the associated costs

- Amount available will depend on the arrangement with the coordinator

Best to discuss these arrangements as early as possible

How can Third Countries (TC) be involved?

International mobility is key

- Host secondees
- Send staff on secondments (funding rules apply)
- Provide other training and networking opportunities
- Contribute to advisory committees or project boards
- Participate in networks wide activities
- Participate as a key stakeholder/end user
- Provide background or other resources

Only TC from low-middle income countries can send staff on secondments



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MSCA Guidance

HORIZON-MSCA-2023-SE-01



MSCA Related EU Policies

- Contribution to the [European Research Area](#) and [European Education Area](#)
- Committed to the [EU Charter for Researchers](#), [The Code of Conduct for the Recruitment of Researchers](#) and [Innovative Doctoral Training Principles](#)
- Supports underlying principles of [Open Science](#), [Responsible Research & Innovation](#)
- Support and encourage good supervision – [MSCA Guidelines on Supervision](#)
- Promotes Sustainable behaviours and policies – [MSCA Green Charter](#)
- Development of synergies – [MSCA-NET Synergies Brief](#)
- Innovation Agenda – [MSCA-NET Non-Academic Sector Engagement](#)



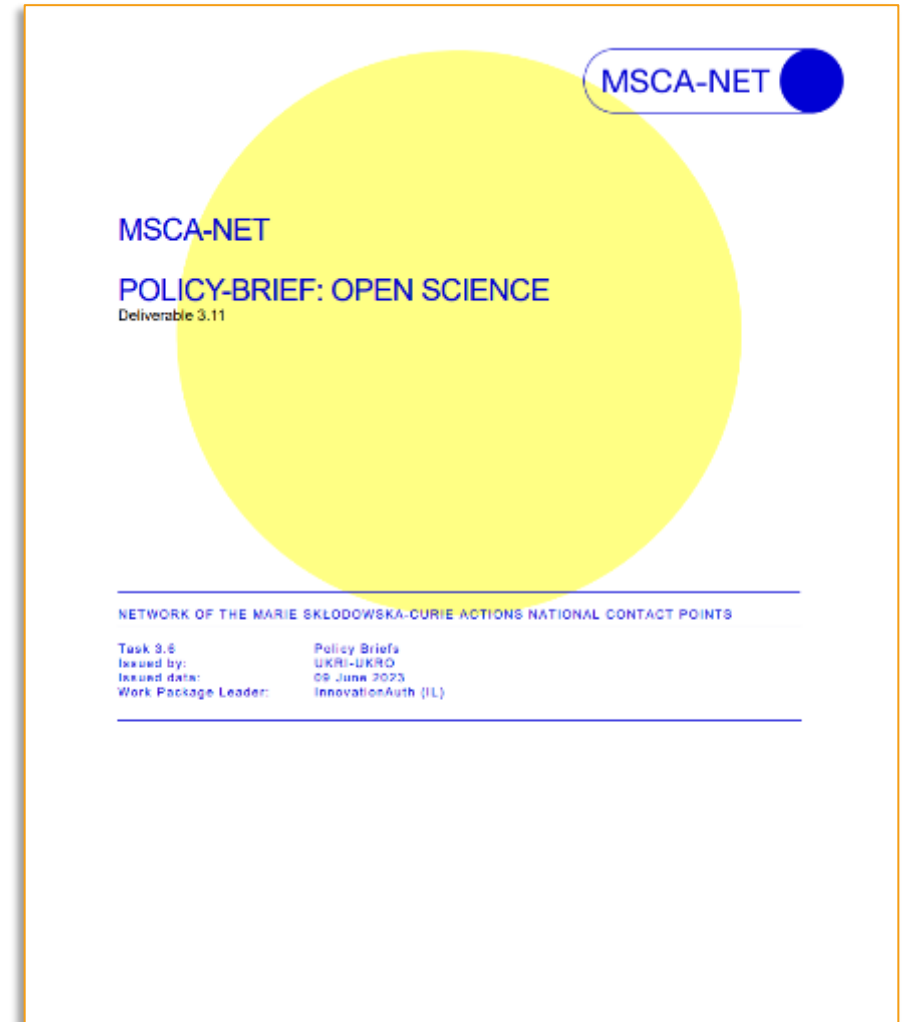
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Addressing Open Science

Needs to be considered in terms of the research and the way it is undertaken as well as training

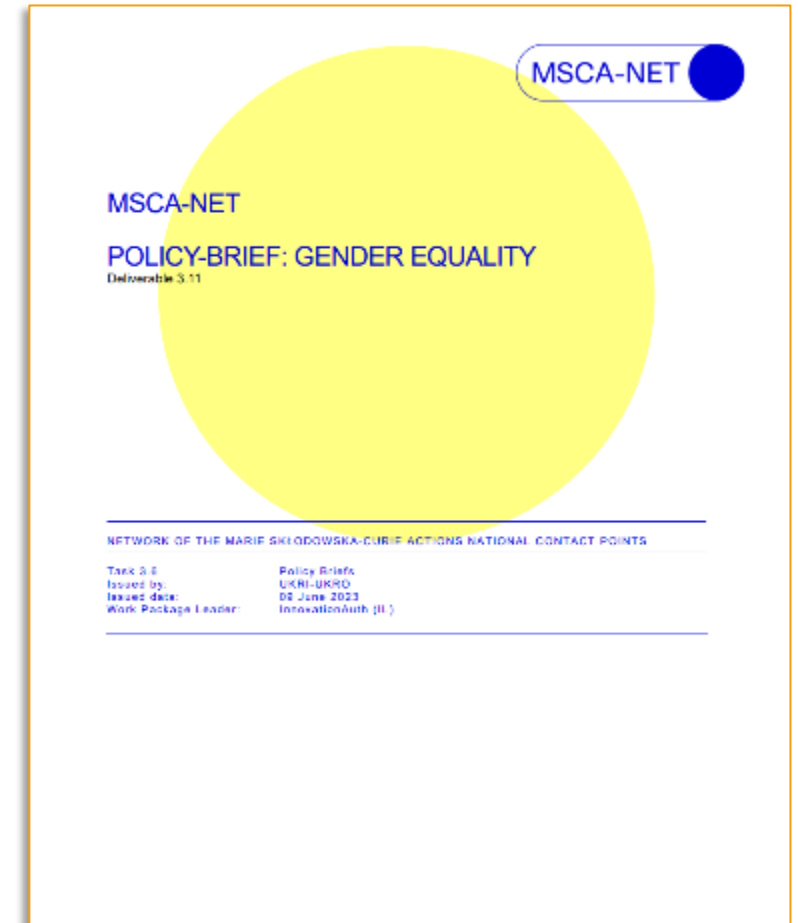
- Using open knowledge sources, e.g., open data, open publications, samples etc.
- Early and open sharing of research e.g., pre-registration, registration of reports, pre-prints, crowdsourcing etc.
- Providing open access to all research results and outputs including software, models, algorithms, and workflows
- Participating in open peer review
- Involving all relevant knowledge actors including citizens, civil society, and end users in the co-creation of research and innovation agendas and contents (such as citizen science)
- Using appropriate licenses to support reusability of data and other outputs such as Creative commons, Open data Commons etc



Addressing gender and intersectionality

Needs to be considered in terms of the research, training, personnel involved in the project

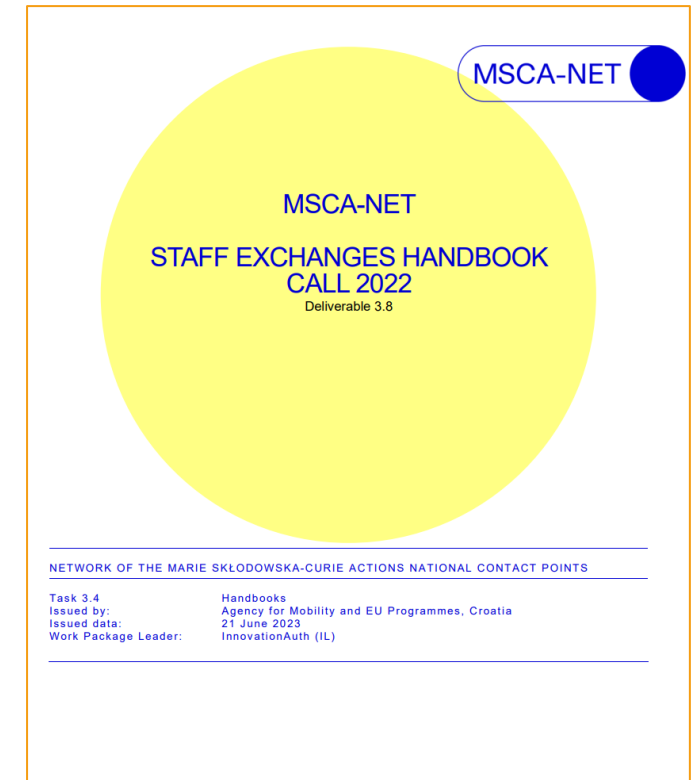
- Are gender norms embedded in the concepts, theories and models used by your research field? If so, how do these gender norms/assumptions influence the research area?
- How do gender and interconnected social categorizations, such as race, class etc. shape your research question and desired outcomes?
- Do the chosen methodology(ies) ensure that gender, and other connected social characterizations, are considered and investigated?
- 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?
- Do you have a diverse panel of external/independent evaluators?



Dissemination, Exploitation and Communication

Includes communicating about the project communication, dissemination and exploitation of results, and communication skills of the researchers

- **The project**
 - ✓ Who are the key stakeholders that need to know about your project and why?
 - ✓ Where do I need to direct my activities to reach these audiences?



Dissemination, Exploitation and Communication

Individual Project Results

Dissemination

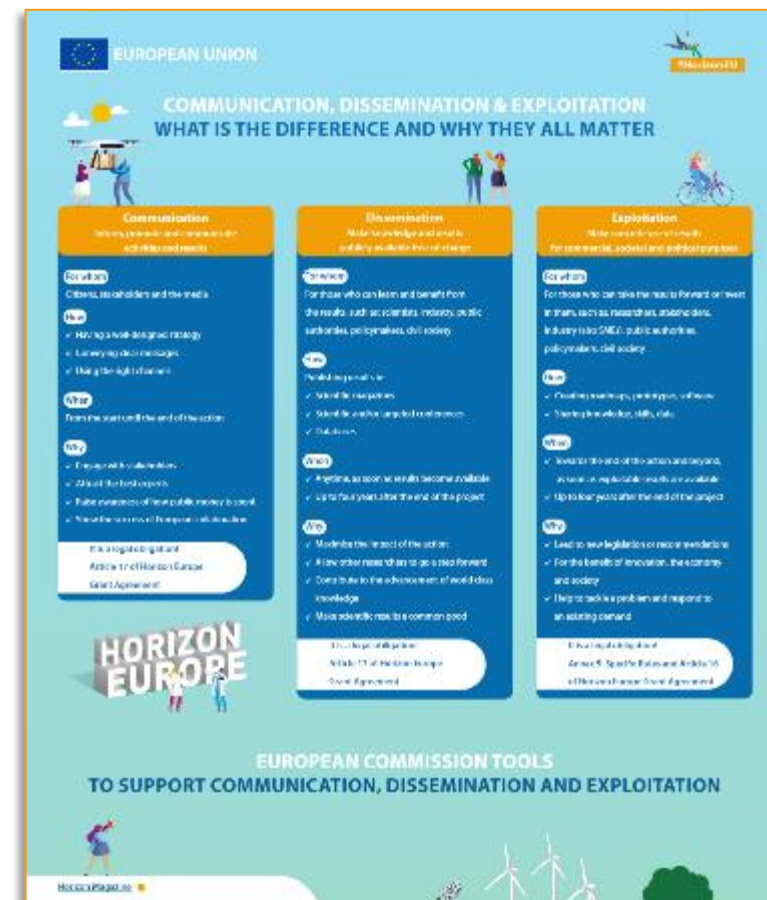
Promotion and raising awareness of project results

Exploitation

Using the results, such as for commercial purposes or in public policymaking

Communication

Making your research activities known to society throughout project life span – **Public Engagement**



Addressing D,E & C

	Objective	Focus	Target Audience
Communication	Researching out to society Demonstrating impact and benefits	Informing about and promoting the project and the results/successes	Multiple audiences
Dissemination	Transfer of knowledge and results Aim to enable others to use and take up results	Ensure results are available and able to be used by others	Those that are interested in the potential use of the results
Exploitation	Use of project results through scientific, economical, political or societal exploitations Turn R&I actions into concrete value and impact for society	Make concrete use of results	People/organisations, including project partners that can make concrete use of the results User groups



Reminder

HORIZON-MSCA-2023-SE-01



Letters of Commitment

➤ Failure to include a letter of commitment can result in the proposal being ineligible or the Associated Partner being excluded

- Requirement for Associated Partners
- The letter must be up-to-date and on headed paper
- It should confirm real and active participation in the proposed action
- General guidelines are given
- They can take time to get signed



Proposal Advice

- Read all call documentation and the evaluation criteria
- Closely follow the call requirements
- Be in line with the action's objectives and expected outcomes
- Describe the benefits of cooperation and how they can go beyond this project
- Make it easy for the evaluators to find the information
- Use clear and concise language
- Include diagrams, images, tables if appropriate
- Research previous and current projects
- Find colleagues to proofread drafts with the evaluation criteria
- Consider any relevant EU policy documents



Success rates – 2022 call

- 73 projects funded out of 196 submitted proposals (37% success rate)
- UK involved in 55 funded projects

Panel	Success rate (%)
Engineering and ICT	34
Chemistry	16
Social Sciences and Humanities	15
Environment and Geosciences	11
Life Sciences	10
Physics	8
Mathematics	3
Economics	3



Key Messages From Today

Staff Exchange is not only about secondments
- you need a collaborative research and innovation project

Think carefully about the timing of secondments – cash flow, who can go when etc.

Put yourself in the shoes of the evaluators – make their life easy...

Follow the Guide for Applicants!



Resources

MSCA Work Programme 2023-2024 https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/wp-call/2023-2024/wp-2-msca-actions_horizon-2023-2024_en.pdf

Marie Skłodowska-Curie Actions Website <https://marie-sklodowska-curie-actions.ec.europa.eu/>

Horizon Europe MSCA - How to apply https://rea.ec.europa.eu/funding-and-grants/horizon-europe-marie-sklodowska-curie-actions/horizon-europe-msca-how-apply_en#ecl-inpage-293

MSCA-NET project <https://msca-net.eu/>

UKRO Portal <https://www.ukro.ac.uk/>

Funding & Tender Opportunities Portal <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home>

Horizon Europe Strategic Plan <https://op.europa.eu/en/web/eu-law-and-publications/publication-detail/-/publication/3c6ffd74-8ac3-11eb-b85c-01aa75ed71a1>

Horizon Europe Programme Guide https://ec.europa.eu/info/funding-tenders/opportunities/docs/2021-2027/horizon/guidance/programme-guide_horizon_en.pdf



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Session 2: Practical Considerations

22 November, 09:30-10:30 UK time

Will cover:

- Submission and evaluation criteria
- Tips for proposal development
- Question and Answer Session

[Register on the UKRO portal](#)





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Thank you

mariecurie-uk@ukro.ac.uk



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