

# MSCA Postdoctoral Fellowships Post-Award Factsheet

## Introduction

The Marie Skłodowska-Curie Actions (MSCA) aim to promote scientific excellence and attract highly skilled researchers and innovators to Europe. Specifically, the various MSCA funding opportunities set out to support researcher training, career development, and knowledge exchange, thereby helping researchers establish a stable career path within Europe.

This factsheet sets out to support beneficiaries and others in the implementation of their Postdoctoral Fellowships. For an overview of the other MSC Actions, see the dedicated [UKRO MSCA factsheets](#).

## Grant agreement Preparation

As is the case for all Horizon Europe proposals, the 'eight months to grant from the call deadline' principle applies. Therefore, for the most part, applicants will receive their results within five months of the call deadline and successful proposals will usually be asked to sign their grant agreement within the remaining three months. Each project will be allocated a Project Officer from the Research Executive Agency (REA), who will be responsible for its management on behalf of the EU. Project Officers provide instructions as to the steps required to complete grant preparation and are the first point of contact for any questions concerning the process. Awardees are encouraged to discuss concerns, changes and questions with their Project Officers throughout the lifetime of the grant.

## Funding – Unit Costs

The MSCA funds projects using fixed 'unit cost contributions' for the researcher and the institution. These 'unit costs' are flat-rate EU contributions to support the researcher, research costs and institutional costs during the project and the total EC contribution is determined by multiplying the relevant 'unit costs' by the number of person-months implemented. Fellows are expected to work full-time on their project, however part-time working for professional reasons is also supported by prior agreement from the REA.

Researcher Unit Costs (contributions for recruited researchers per person-month)					Institutional Unit Costs (contributions per person-month)	
Living Allowance	Mobility Allowance	Family Allowance	Long-Term Leave Allowance	Special Needs Allowance	Research, training and networking contribution	Management and indirect contribution
EUR 5990	EUR 710	EUR 660	EUR 6700 x % covered by the beneficiary	Requested unit <sup>1</sup> x (1/number of months)	EUR 1000	EUR 650

**Researcher unit costs** must be used for the benefit of the MSCA fellow in full. Where these costs make up the salary of the researcher, they provide a gross figure from which statutory deductions for both the employer and employee can be made. For most UK organisations, we understand that

<sup>1</sup> The pre-defined categories are 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

standard practice is to apply a conservative exchange rate during the implementation of the project to account for currency fluctuations. This is then followed by a corrective balancing payment to the researcher part-way through, or at the end of, the project to ensure they receive the full amount.

- **Living Allowance** is the EU contribution to the gross salary costs of the researcher and is subject to including compulsory deductions under national law, such as employer and employee social security contributions and direct taxes. A country correction co-efficient (CCC) is applied to the Living Allowance and the CCC for each country is set out in the MSCA Work Programme. The CCC for the UK in the [2023-2025 MSCA Work Programme](#) is 141.7%. For those on a Global Fellowship, two different CCCs will be applied, one for each phase of the Fellowship.
- **Mobility Allowance** is to be used by the recruited researcher to cover costs related to their mobility, such as travel and accommodation. It is to be used to cover the private costs of the researcher. The Mobility Allowance should not be used to cover professional costs such as visa costs and the NHS surcharge for the researcher, as these are covered by the 'Research, Training and Networking costs'.
- **Family Allowance** is only available to those fellows who either have or acquire family obligations during their fellowship. The allowance should be used to cover the travel and other relocation costs, including visa entry costs, for the family members and is meant to reduce family-related obstacles to researcher mobility. The family allowance can be requested when, and if, the need arises throughout project implementation. The EC contribution is determined by multiplying the 'unit cost' by the number of months to which the researcher has family obligations. Should the fellow's eligibility change during the action, then the beneficiaries must update the fellow's [mobility declaration](#) to reflect that change.
- **Long-term Leave Allowance** contributes to the beneficiary's payment obligations related to researchers' leave that is longer than 30 consecutive days and not due to annual leave, maternity, paternity, parental, sick or special leave. It can be requested as, and when, the need arises. The allowance is a gross amount and will be subject to statutory deductions. During the leave of absence, all other allowances will not be available.
- **Special Needs Allowance** replaces the Special Needs Lump Sum grant in Horizon 2020. This allowance contributes to the additional costs of researchers with disabilities, whose long-term physical, mental, intellectual or sensory impairments are certified by a competent national authority and of such nature that their participation in the MSC Action may not be possible without the acquisition of special needs items or services. These special needs items or services shall not have been funded from another source (e.g. social security or health insurance). The allowance can be claimed anytime during project implementation.

**Institutional unit costs** are directly linked to the Researcher unit costs. They can only be claimed if the host institution successfully recruits researchers in accordance with the months specified in the grant agreement. They can also be distributed to any Associated Partners to cover the costs associated with hosting the recruited researcher.

- **Research, Training and Networking costs (RTN)** are designed to cover the costs associated with the research, training and networking activities, as outlined in the grant agreement. The RTN budget should also be used to cover visa-related fees, travel and subsistence, as well as the cost of going on secondments.
- **Management and Indirect unit costs** cover all general costs of the host institution connected to the action (administrative and financial management, logistics, ethics, human resources, legal advice, etc.).

## Eligibility Criteria of Recruited Researchers

For individuals to engage in MSCA projects, they must meet specific eligibility conditions. The two main factors taken into consideration are the individual's career stage/status and their international mobility.

## Global Postdoctoral Fellowships

Only nationals or long-term residents from an EU Member State or Horizon Europe Associated Country are eligible to participate in a Global Postdoctoral Fellowship.

### Career stage

- Must be postdoctoral researchers at the date of the call deadline, i.e., in possession of a doctoral degree, defined as a successfully defended doctoral thesis, even if the doctoral degree has yet to be awarded;
- Must have a maximum of 8 years full-time equivalent experience in research, measured from the date that the researcher was in a possession of a doctoral degree and certified by appropriate documents. Years of experience outside research and career breaks (e.g. due to parental leave), will not be taken into account.
- For nationals or long-term residents of EU Member States or Horizon Europe Associated Countries who wish to reintegrate to pursue their research career in EU Member States or Horizon Europe Associated Countries, years of experience in research in third countries will not be considered in the above maximum.

### Mobility

- Must not have resided or carried out their main activity (work, studies, etc) at the host organisation for the outgoing phase for more than 12 months in the 36 months immediately before the call deadline. For researchers wishing to reintegrate from a third country, there must be direct mobility to an EU Member State or Horizon Europe Associated Country.
- Compulsory national service, short stays and time spent as part of a procedure for obtaining refugee status are not taken into account.

## European Postdoctoral Fellowships

Researchers of any nationality can participate in the European Fellowships.

### Career stage

- Must be postdoctoral researchers at the date of the call deadline, i.e., in possession of a doctoral degree, defined as a successfully defended doctoral thesis, even if the doctoral degree has yet to be awarded;
- Must have a maximum of 8 years full-time equivalent experience in research, measured from the date that the researcher was in a possession of a doctoral degree and certified by appropriate documents. Years of experience outside research and career breaks (e.g. due to parental leave), will not be taken into account.
- For nationals or long-term residents of EU Member States or Horizon Europe Associated Countries who wish to reintegrate to pursue their research career in EU Member States or Horizon Europe Associated Countries, years of experience in research in third countries will not be considered in the above maximum.

### Mobility

- Must not have resided or carried out their main activity (work, studies, etc.) in the country of the recruiting beneficiary for more than 12 months in the 36 months immediately before their recruitment date. For researchers wishing to reintegrate from a third country, there must be a direct mobility to an EU Member State or Horizon Europe Associated Country.
- Compulsory national service, short stays and time spent as part of a procedure for obtaining refugee status are not taken into account.

Proposals from individual researchers with the same recruiting organisation (and for Global Postdoctoral Fellowships, also the Associated Partner hosting the outgoing phase), which were

submitted to the previous call of MSCA Postdoctoral Fellowships under Horizon Europe and scored less than 70%, must not be resubmitted the following year.

## Funding & Tenders Portal - 'My Projects'

As with all Horizon Europe projects, management and implementation will be carried out from start to finish through the [Funding & Tenders Portal](#). All ongoing projects can be accessed by individuals through their 'EU Login' (previously European Commission Authentication Service - ECAS) profile under 'My Projects' > 'My Area' which becomes visible after logging in. Comprehensive guidance concerning the management of projects through the Funding & Tenders Portal is available in the [Online Manual](#) and its 'How to' Wiki section (users must be logged in to access it).

## Payments and Reporting

**Pre-financing** of MSCA projects is limited and can be up to a maximum of 75% of the total EU contribution, 5% of which will be retained for the Mutual Insurance Mechanism (former Guarantee Fund). Pre-financing will normally be transferred to the coordinator within 30 days from entry into force of the grant agreement, or 10 days before the start date of the project.

Reporting is broken down into **Continuous Reporting and Periodic Reports** both of which are accessed through the 'My Projects' management system within the Funding & Tenders Portal. **Continuous** Reporting is available throughout the lifetime of the project. Information concerning the project is added throughout the lifetime of the action and will be consolidated at the reporting stage to help alleviate the administrative burden of bringing reports together. This mode of reporting is particularly important for the [Mobility Declarations](#)<sup>2</sup> which need to be uploaded within 20 days of the recruitment of the researcher. The Declaration will need to be updated in case of changes in the fellow's family status, in the fellow's working time arrangement, or if the action is suspended. In the cases of suspension or request for a different working time pattern, beneficiaries should contact the Project Officer for guidance and approval.

Beneficiaries will also be obliged to complete **Periodic Reports**. The schedule of reporting for each MSCA project will be detailed under Article 21 of the grant agreement. Generally speaking, reporting periods last 18 months.

At the end of a reporting period, projects are required to submit both a **Technical Report** giving an overview of progress so far and a **Financial Report** declaring the number of person-months implemented. These two parts of the report will need to be submitted together as one report within 60 days of the end of each reporting period. The REA will process the reports as soon as possible and, assuming the reports are accepted, the corresponding payments will be transferred (up to 90% of the total EU contribution).

The final 10% of the project costs will be released following the successful submission and acceptance of the **Final Report**. The Final Report is also made up of both technical and financial updates and should be submitted within 60 days of the project end date. Once the Final Report has been accepted, the remaining unit costs related to the project will be released along with the amount retained by the Mutual Insurance Mechanism.

## Recruitment, Employment and Visa Considerations

Postdoctoral fellows must be directly recruited by the beneficiary on an employment contract (or other direct contract with equivalent benefits, including social security coverage). The employment contract must comply with Annex 5, which specifies recruitment and working conditions for researchers, as well as researcher obligations. The recruited researchers may need to obtain a UK entry visa. Information on UK visa requirements can be found in the dedicated [UKRO factsheet](#).

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<sup>2</sup> Referred to as the 'Researcher Declaration' under Horizon 2020.

MSCA fellows must be hired on a full employment contract by the host institution and be treated with equivalent status to other staff members.

## Record Keeping and Audits

Audits for MSCA projects are different from other Horizon Europe projects. When monitoring and/or auditing MSCA projects, the main concern is whether the **Researcher unit costs** were correctly implemented. In practice, this means auditors do not look at actual costs. Instead, evidence is sought that demonstrates the eligibility of the researcher/staff member against the scheme conditions, as well as the correct mode of engagement, i.e., that the researcher was employed as a full member of staff with associated benefits, and that this was the case for the period claimed for. Auditors will also check that the number of months declared corresponds to the actual number of months spent by the researchers on the research training and innovation activities.

Different types of evidence to prove the correct implementation of the Researcher unit costs, correct employment conditions and working time can be retained, including but not limited to:

- Researcher/staff member's CV;
- Copies of diplomas;
- Lab books;
- Scientific articles;
- Library records;
- Travel documentation;
- Employment contracts; and
- Time Sheets.

How long these types of records should be retained following the end date of the project will be indicated under Article 20 of the grant agreement and is normally five years.

Assuming the **Researcher unit costs** are accepted, the **Institutional unit costs** will be accepted without any detailed checks from the REA.

## Partnership Agreements

Partnership agreements can include specific provisions related to the Associated Partners and host organisations for Global Fellowships, though these can also be covered by other types of agreements. Neither the Commission nor the REA, provide templates or any detailed guidance on what should appear in such agreements, though they do recommend that the following be covered:

- Management of access to the electronic exchange system;
- Distribution of EU funding;
- Additional rules on rights and obligations related to background and results;
- Settlement of disputes;
- Liability, indemnification and confidentiality arrangements between the partners; and
- Conflict resolution processes.

UKRO, the European Commission and the REA do not advocate the use of any standard agreement templates. However, below are some examples that organisations may wish to use and adapt to their own needs:

- [DESCA Horizon Europe Model Consortium Agreement](#);
- [LERU template for European Training Networks \(ITN\)](#).

## More information

- [Horizon Europe website](#)
- [MSCA Website](#)
- [MSCA 2023-24 Work Programme](#)
- [Funding & Tenders Portal \(Calls for proposals\)](#)
- [MSCA Green Charter](#)
- [MSCA Guidelines on Supervision](#)
- [UKRO MSCA factsheets](#) (subscriber access required)
- [UK MSCA National Contact Point events](#)
- [The European Charter & Code for Researchers](#)
- [The MSCA-NET webpage](#) (provided by MSCA National Contact Points)

Horizon Europe's legal basis:

- [Regulation establishing Horizon Europe](#)
- [Decision establishing the Specific Programme of Horizon Europe](#)
- [First Strategic Plan for Horizon Europe \(2021-2024\)](#)
- [Second Strategic Plan for Horizon Europe \(2025-2027\)](#)

UKRO Portal

- [UKRO Portal](#) (subscriber access required)