

MSCA Staff Exchanges 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 Staff Exchanges. For an overview of the other MSC Actions, see the dedicated [UKRO MSCA factsheets](#).

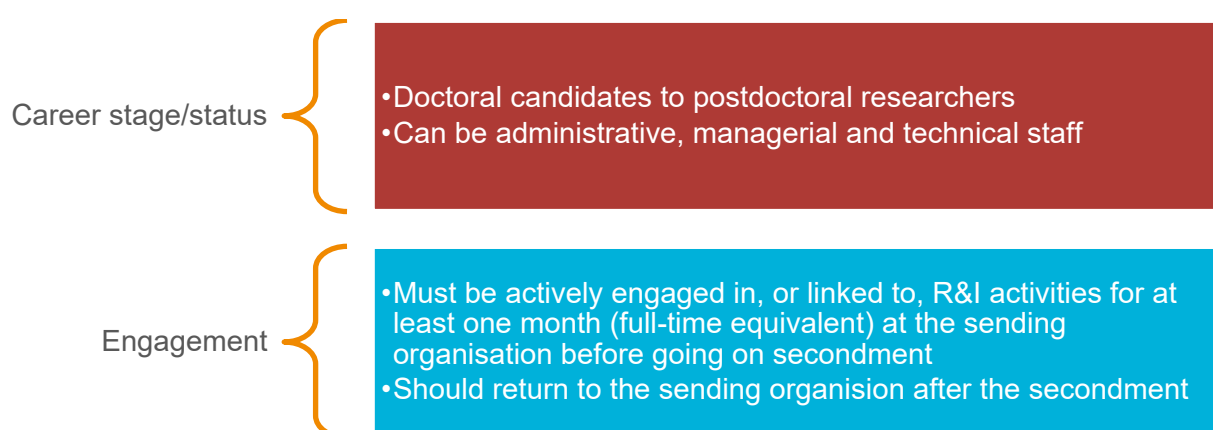
Grant agreement Preparation

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 any concerns, changes, and questions with their Project Officers throughout the lifetime of the grant.

UKRO also regularly publishes articles and holds events on MSC Actions to help subscribers better manage their projects.

Eligibility Criteria of Recruited Individuals

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.



Secondment Eligibility

Secondments must last at least one month and cannot be longer than 12 months in duration, regardless of the number of organisations the staff is seconded to. The secondments can be split into several short stays with one or several beneficiaries or Associated Partners. It is important to make sure that split secondments add up to at least one month.

Secondments should embrace inter-sectoral, international, and interdisciplinary mobility. Secondments between organisations within EU Member States and Horizon Europe Associated Countries should be

inter-sectoral, though some same-sector exchanges are possible provided they are interdisciplinary and do not exceed more than one third of the total secondments. Interdisciplinarity is not required for same-sector exchanges with non-associated Third Countries.

There are specific funding eligibility rules, depending on the secondment arrangement. The different funding eligibility rules are outlined in the table below:

Sending (Seconding staff from organisation)					
		Academic Organisation in MS/AC	Non-Academic Organisations in MS/AC	Organisations in Third Country eligible for EC funding ¹	Organisations in Third Country not eligible for funding ¹
Hosting (Receiving seconded staff)	Academic Organisation in MS/AC	Yes ² (Eligible for funding)	Yes (Eligible for funding)	Yes (Eligible for funding)	Yes (Not eligible for funding)
	Non-Academic Organisations in MS/AC	Yes (Eligible for funding)	Yes ² (Eligible for funding)	Yes (Eligible for funding)	Yes (Not eligible for funding)
	Organisations in Third Country eligible for funding	Yes (Eligible for funding)	Yes (Eligible for funding)	Yes (Not eligible for funding)	Yes (Not eligible for funding)
	Organisations in Third Country not eligible for funding	Yes (Eligible for funding)	Yes (Eligible for funding)	Requires exceptional justification (Not eligible for funding)	No

Funding – Unit Costs

The MSC Actions fund 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.

The funding is linked to the eligibility of the researcher, the secondment, and the number of completed secondment months. Once the minimum secondment duration is met, any incomplete months are reimbursed on a pro-rata basis, calculated as 1/30 of the unit cost for each day completed.

Researcher Unit Costs (Contributions for seconded staff per person-month)		Institutional Unit Costs (contributions per person-month)	
Top-up allowance	Special Needs Allowance	Research, training and networking contribution	Management and indirect contribution
EUR 2710	Requested unit ³ x (1/number of months)	EUR 1300	EUR 1000

¹ See the [Horizon Europe Programme Guide](#) for the list of countries eligible for funding through Horizon Europe.

² Inter-sectoral secondments are only eligible if they do not exceed more than 1/3 of the total secondments and are interdisciplinary.

³ 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

- **Top-up Allowance** must be used to the benefit of the staff member in full and contributes to the travel, accommodation, and subsistence costs related to the secondment. It does not contribute to the salary of the seconded person. This can either be given directly to the seconded individual via lump sum payment, or it can be claimed against receipts in accordance with the internal policies of the seconding organisation.
- **Special Needs 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. The project has the flexibility to use the Institutional unit costs as they see fit to ensure the successful implementation of the project. For example, the coordinator may retain a higher proportion of the Management and Indirect costs budget, or one organisation may have lower research costs and, therefore, receive a reduced Research, Training and Networking contribution. All redistribution of the Institutional unit costs should be formalised in writing in the Consortium Agreement.

- **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.
- **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.).

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. The coordinator can only transfer funds to beneficiaries that have already acceded to the grant agreement and only when the minimum number of beneficiaries has been met.

Reporting is broken down into **Continuous Reporting** and **Periodic Reports** both of which are accessed through the 'My Projects' management system within the Funding and Tenders Opportunities Portal. It is the beneficiary's responsibility to complete all reports, including those related to any Associated Partners eligible for EC funding.

- **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**⁴ which need to be uploaded within 20 days of the secondment of each seconded researcher.

- **Periodic Reporting** schedule will be detailed under Article 21 of the grant agreement. In general, reporting periods last 18 months. At months 12 and 36, the beneficiaries will also need to submit a **Progress Report** providing a comprehensive overview of the progress made in the previous calendar year.
- **Financial Reporting** declaring the number of person-months, along with a **Technical Report** giving an overview of progress so far, are required to be submitted at the end of a reporting period. These two reports 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 **Mid-Term Meeting** provides an opportunity for the beneficiaries, Associated Partners, entities with a capital/legal link, as well as the recruited researcher to meet with the Agency to discuss any project implementation issues and identify feasible solutions. The meeting is designed to assess the general progress of the project compared to the original planning and objectives. It is also a time as well as for the project officer to meet researchers seconded on the project. The meeting is generally organised within the first reporting period, ideally, between months 14 and 18 and definitely before the end of the first reporting period, in accordance with Article 25.
- **The Final Report** is also made up of the 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 10% of the project costs will be released along with the Mutual Insurance Mechanism.

Recruitment and Working Conditions

The seconded staff members must be actively engaged in, or linked to, research and innovation activities at the sending organisation for at least one month (full-time equivalent) before going on secondment. In accordance with Annex 5, the seconded staff must enjoy at least the same standards and working conditions at the place of secondment as those applicable to persons holding a similar position there. They must also be covered by an appropriate medical insurance scheme and work full-time while on secondment, even if their normal working hours are part-time.

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 secondment 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;

⁴ Referred to as the 'Researcher Declaration' under Horizon 2020.

- Copies of diplomas;
- Lab books;
- Scientific articles;
- Library records;
- Travel documentation;
- Employment contracts; and
- Bank transfers to the staff member.

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.

It is important to remember that Associated Partners do not sign the grant agreement and the beneficiaries receiving secondees from Associated Partners eligible for EC funding will be responsible for declaring their costs. They will also be responsible for ensuring that the Associated Partner complies with the relevant EU funding rules.

Consortium and Partnership Agreements

Consortium Agreements between the beneficiaries are required for all Staff Exchanges projects. A Consortium Agreement sets out the internal arrangements regarding the governance, operation, and coordination of the project to ensure that the action is implemented properly. Consortium Agreements can also include specific provisions related to Associated Partners, though these can also be covered in separate Partnership Agreement(s), or other types of agreements.

Neither the Commission nor the REA, provide templates or any detailed guidance on what should appear in a Consortium Agreement, though they do recommend that the following be covered:

- The internal organisation of the consortium;
- 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 internal 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](#)
- [2023-2024 Marie Skłodowska-Curie Actions Work Programme](#)
- [MSCA Green Charter](#)
- [MSCA Guidelines on Supervision](#)
- [The European Charter & Code for Researchers](#)
- [UKRO MSCA factsheets](#) (subscriber access required)
- [MSCA-NET](#)

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)