

UKRO MSCA Webinar Series

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An introduction to

Marie Skłodowska-Curie Actions (MSCA)

Staff Exchanges

About UKRO

We support UK based organisations involved in EU R&I

Our Mission: Maximise UK participation in Horizon Europe

UKRO Portal

- dedicated news articles, events and factsheets to support participation
- alerts to upcoming opportunities and call updates

UK National Contact Point for

- <u>European Research Council</u>
- Marie Sklodowska-Curie Actions programmes
- Widening Participation
- COST
- New European Bauhaus

We are part of UKRI's International team



Horizon Europe: UK Participation

The UK's association to Horizon Europe and Copernicus took effect on 1 January 2024.

This means UK entities can participate in/coordinate projects and receive funding from Horizon Europe, with the exception of the EIC Accelerator Investment Fund.

As of 2025 even <u>more opportunities will be available</u> to UK researchers & innovators.

The <u>UKRO website provides information</u> on upcoming European funding opportunities.





Introduction to MSCA



Marie Skłodowska-Curie Actions

MSCA sets out to:

- support researcher training and career development
- create impact on researchers, institutions and systems
- contribute to EU priorities
 - European Green Deal objectives
 - The Climate Action target of Horizon Europe
 - The European Research Area (ERA)
 - The European Education Area (EEA)





It does this through...

- encouraging people to become researchers and innovators
- equipping researchers with necessary skills and international experience mobility is key (international, intersectoral & interdisciplinary)
- supporting long term employability
- developing attractive career opportunities & employment conditions
- fostering and develop an innovation and entrepreneurial mindset strong collaboration with non-academic sector
- fostering an R&I environment based on excellence in research (researchers & organisations)
- promoting the EU's global attractiveness for talents



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

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

COFUND

Co-finances new or existing national, regional or international 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.



MSCA Staff Exchanges



MSCA Staff Exchanges – the basics

- build new, develop existing networks and collaborations for the long-term
- increase global cooperation
- increase collaboration between sectors (including SMEs)
- enhance knowledge transfer between participants
- develop research and transferable skills
- support long-term employability
- encourage mobility: inter-sectoral, international and interdisciplinary
- share of knowledge and ideas for the advancement of science and the development of innovation

→ Implement a collaborative R&I project through mobility



Eligibility Criteria



MSCA Staff Exchanges eligibility – at a glance

- all countries and nationalities can participate
- all institutions fulfilling the requirements of the Horizon Europe Rules for Participation can take part
- consortium must be composed of at least 3 legal entities in 3 different countries (at least 2 from MS/AC)
- maximum size and duration of project is 360 person months over 4 years
- secondment of staff for periods between 1 and 12 months



MSCA Staff Exchanges eligibility – consortium

- any legal entity established in the academic or non-academic sector
- 3 different legal entitles 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 nonprofit 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

MSCA Staff Exchanges – consortium composition

- no typical consortium size, depends on the project needs recommendation 6-10 organisations
- two types of participants
 - beneficiaries (sign the GA)
 - associated partners (do not sign the GA)
- beneficiary: located in MS/AC; sends & hosts staff; provides training opportunities, directly receives funding
- associated partner: usually located in TC; hosts secondments; provides training opportunities

no limit on associated partners but must be reasonable and in line with project can send staff on secondments in certain circumstances





Eligibility Criteria – the secondee

- under the direction and instructions of the sending organisation for the duration of the secondment
- actively engaged in or linked to R&I activities at the sending institution 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 (even if part-time usually)
- secondment can be split into several stays
- seconded staff members do not have to be researchers





Eligibility Criteria – secondment

- from a MS/AC institution → TC institution (any sector)
- from an academic institution → non-academic institution in MS/ACs
- from a non-academic → academic institution in MS/ACs
- from a TC institution eligible for EC funding → MS/AC institution (any sector)

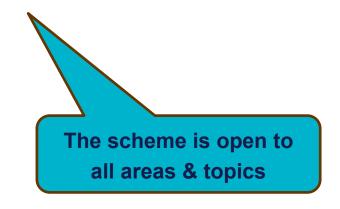


The Project



MSCA Staff Exchanges – the project

- project should go beyond previous work and generate or strengthen long-term collaborations
- have clear R&I objectives and deliverables
- secondments should be essential to achieve the joint project's R&I activities
- exploit complementary competencies of the participating organisations
- create synergies between partners
- support networking activities and the organisation of workshops and conferences
- facilitate the sharing of knowledge and testing of innovative approaches for specific R&I topics
- offer new skills acquisition and career development perspectives



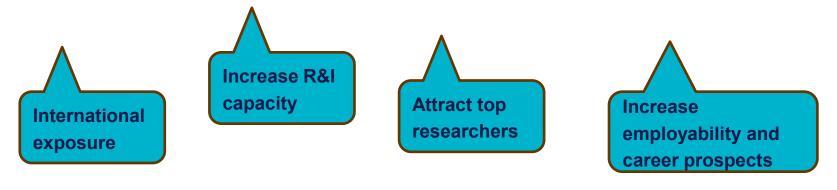






MSCA Staff Exchanges – mobility

- implemented through secondments
 - inter-sectoral
 - international
 - interdisciplinary
- partners (consortium) contribute directly by sending and/or hosting eligible staff members
- secondments must always take place between legal entities independent from each other.
- secondments must be essential to achieve the joint project's R&I objectives.



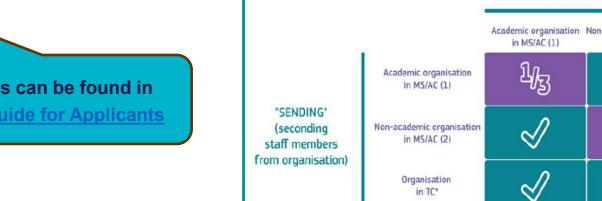




Secondments

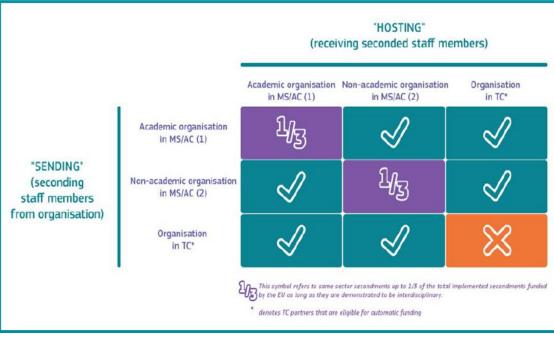
- must be international
- must be intersectoral or interdisciplinary (up to 1/3 of PM) or to a TC
- actively engaged in or linked to R&I activities at the sending institution for at least 1 month prior to first secondment (pro-rata for part time)
- have the appropriate experience to undertake the activities
- must work full time while on secondment (even if part-time usually)
- secondment can be split into several stays
- seconded staff members do not have to be researchers

Details can be found in the Guide for Applicants



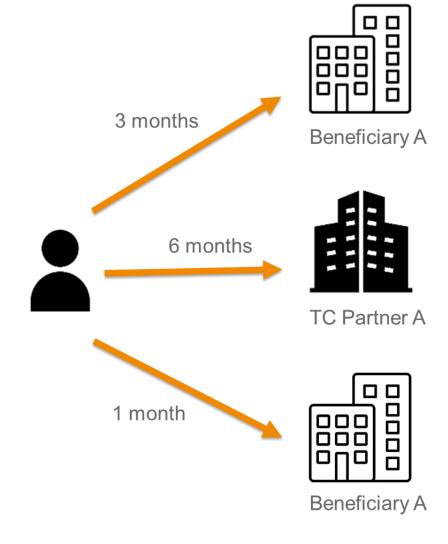


Interdisciplinary: activities undertaken during the secondments are from two or more different scientific disciplines (based on level 1 MSCA keywords)



Split Secondments

- secondments 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 (30 days) must be completed, after which funding is pro-rata





How can Third Countries (TC) be involved?

TC's can:

- host secondees
- send staff on secondments (funding rules apply here only TCs from low-middle income countries
- provide training and networking opportunities
- contribute to advisory committees and/or project boards
- participate in network-wide activities
- participate as a key stakeholder and/or end user
- provide background expertise or other resources

International mobility is key to Staff Exchanges



What's included?

Budget



Funding

- maximum EC funding: 360 person months unit costs apply, no country coefficient
- funding is not to replace salaries of seconded staff
- amount can be used flexibility
- no detailed financial reporting
- TC participants from low-middle income countries are automatically eligible for EC funding





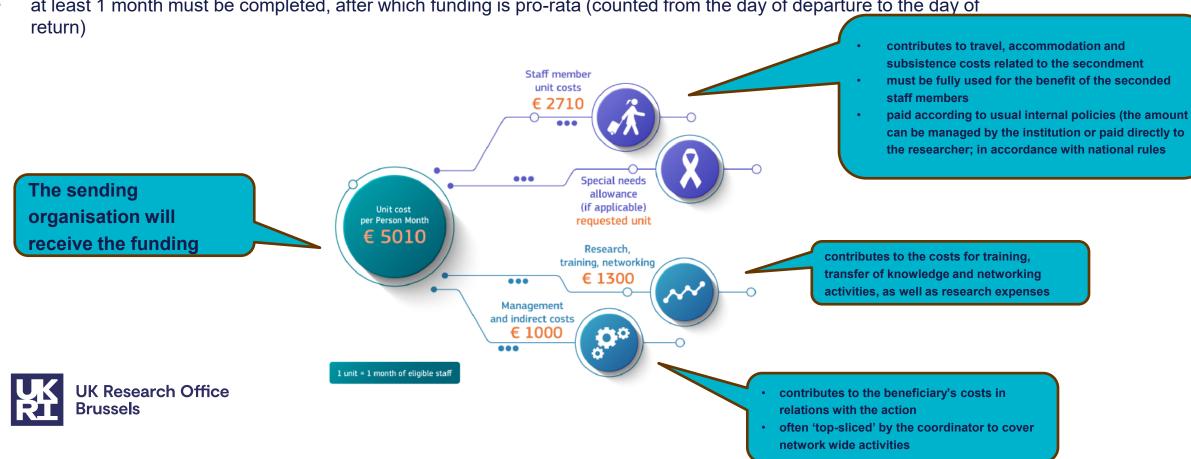
Researchers must receive the full allowance

Funding – the numbers

Maximum EC funding: 360 person months

- employers must continue to salary pay staff member's during their stay abroad
- funding based on unit costs, multiplied by requested person months
- institutional costs depend on implementation of secondments

at least 1 month must be completed, after which funding is pro-rata (counted from the day of departure to the day of



How does the funding work in practice?

- beneficiaries declare all costs in individual financial statements for:
 - o outgoing secondments of its own staff
 - incoming secondments from a TC partner (if eligible for funding)
- beneficiaries must complete a mobility declaration for:
 - o outgoing secondments of its own staff
 - o incoming secondments from a TC partner (if eligible for funding)

 if agreed by the consortium, there can be a different distribution of institutional costs -> not be reported in the financial statements

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



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

The Submission Process



The Submission process

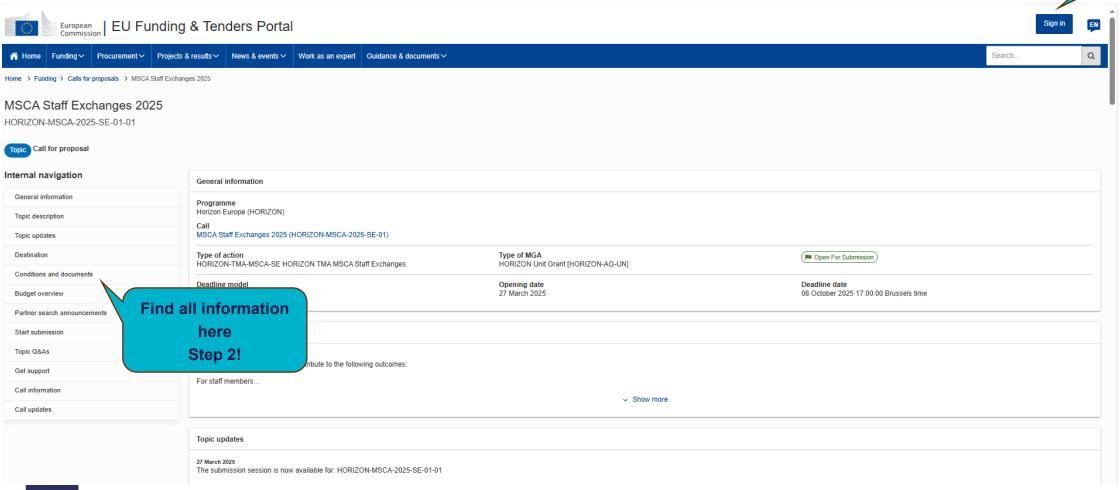
- 1. Register & create an account on EU Funding & Tenders Portal
- 2. Familiarise yourself with all the available guidance documents
- 3. Assemble your consortium and discuss the proposal writing & submission process
- 4. Start the application on the system
- 5. Develop your application & proposal
- 6. Submit early & often (the version submitted by the deadline will be accepted)



Step 1: EU Funding & Tenders Portal

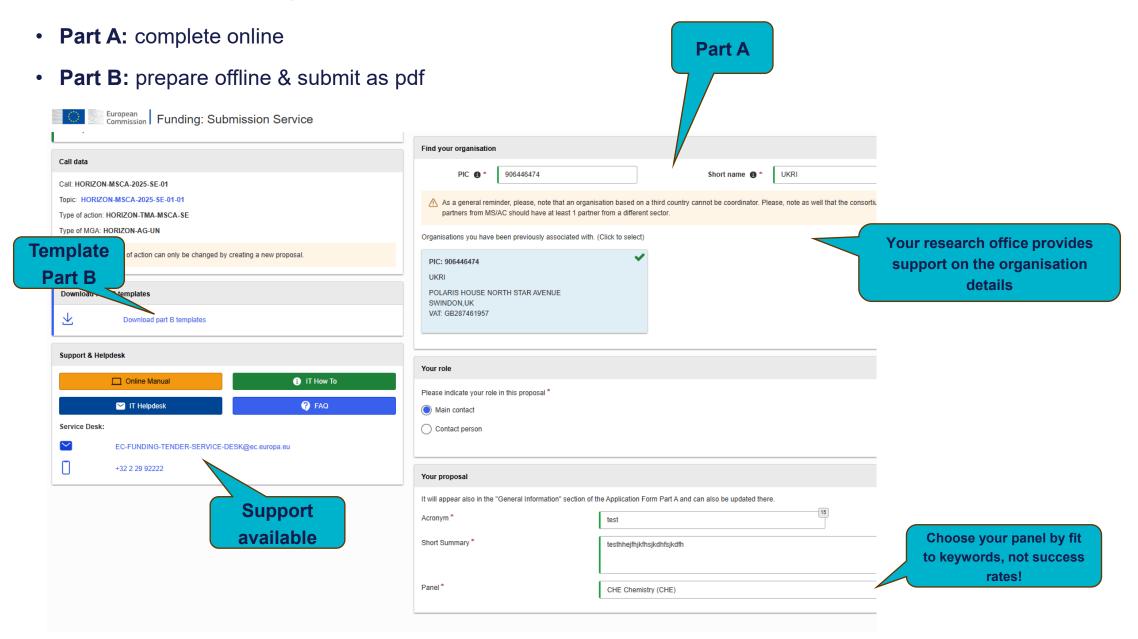
Register here

2025 MSCA SE call page: EU Funding & Tenders Portal | EU Funding & Tenders Portal



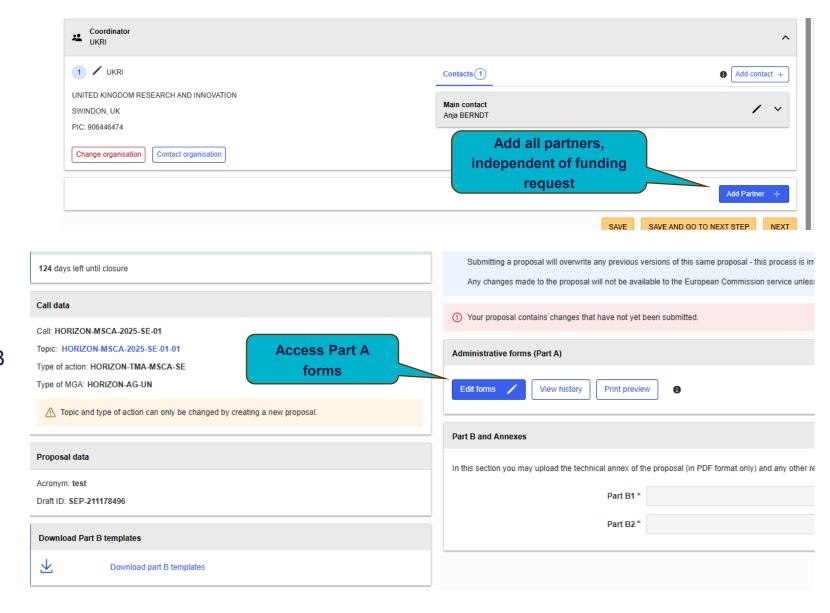


Step 4: Start your application



Step 5: Part A Administrative Forms

- filled in online often prepopulated
- in form guidance available
- participants and contacts
- budget based on person-months requested
- Gender Equality plan
- ethics and security questionnaire
- information on publications etc not mandatory in Part A → required in Part B





Step 5: Part A participants

2 - Participants

List of participating organisations

#	Participating Organisation Legal Name	Country	Role	Action
1	UNITED KINGDOM RESEARCH AND INNOVATION	United Kingdom	Coordinator	Show Participant's Deta
2	LA TROBE UNIVERSITY	Australia	Partner	Show Participant's Deta
3	FRIEDRICH-ALEXANDER-UNIVERSITAET ERLANG	I Germany	Partner	Show Participant's Deta

Short name: FAU Address Street FREYESLEBENSTRAßE 1 Town ERLANGEN Postcode 91058 Germany Country Webpage www.fau.de Specific Legal Statuses Legal person yes Public body yes Non-profit yes

Legal name

FRIEDRICH-ALEXANDER-UNIVERSITAET ERLANGEN-NUE

no

yes

yes

Based on the below details from the Participant Registry the organisation is not an SME (small- and n

Organisation data

PIC

999995408

International organisation.

Research organisation ...

SME self-assessment

SME validation.

SME Data

Secondary or Higher education establishment

SME self-declared status



14/01/2022 - no

unknown

unknown

Check the sector of

each partner!

Step 5: Part A budget

• all participant organisations encoded as "Partner", except the coordinator ("Coordinator")

3 - Budget

	Organisation short name	Role	Country	Academic sector	IO	No of seconded researchers	Number of person months	Contributions for seconded researchers Institutional contributions		contributions	
Participant number								Staff Member Unit Costs	Research, training and networking costs	Management and indirect costs	Total
1	UKRI	Coordinator	UK	Yes	No	4	20	54200	26000	20000	100200.00
2	LTU	Partner	AU	Yes	No	0	0	0	0	0	0.00
3	FAU	Partner	DE	Yes	No	3	18	48780	23400	18000	90180.00
Total					/	7	38	102980	49400	38000	190380.00
									•		

Associated Partner encode 0

Maximum 360 PM



Step 5: Ethics & Security questions

- this section does not affect eligibility
- follow the guidance on <u>How to complete your ethics self-assessment</u>
- "yes" might require a brief statement and/or upload of documents

UK applicants tick

"yes" to non-EU

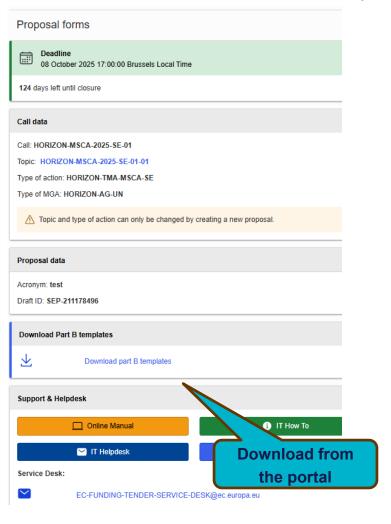
activity

JK Research Office



Step 5: Part B

- Part B1: "the proposal"; sections correspond to evaluation criteria (excellence, impact, implementation); maximum 32 pages
- Part B2: contains information on participating organisations, inter-relationship declaration



Instructions for Drafting Part B of the Proposal

Part B of the proposal contains the details of the proposed research and innovation activities along with the practical arrangements planned to implement them. They will be used by the independent experts to undertake their assessment. We would therefore advise applicants to address each of the award criteria as outlined in the relevant sections, using both the descriptive text and the tables provided. Please note that the explanatory notes included in the Part B proposal template explain the award criteria without being exhaustive. To draft a proposal, applicants should also consult the current version of the MSCA Work Programme.

Applicants <u>must</u> structure their proposal according to the headings indicated in the Part B proposal template

Please note that this call will be a single-stage proposal submission and evaluation procedure. An RTF (rich text format) version of the submission template can be downloaded from the Electronic Submission Service. Applicants <u>must</u> ensure that their proposals conform to this layout and to the instructions given.

Note: For the 2024call, applicants must submit Part B of their proposal as two separate documents:

<u>Document 1 (part B1):</u> must comprise the Start Page, Table of Contents, and Part B sections 1-3. The maximum <u>length</u> for this document is 32 pages not including the end page The Start Page must consist of one whole page. The Table of Contents must consist of one whole page. Section 1 must start on page 3 of the document. Of the maximum 30 pages applied to sections 1, 2 and 3, applicants are free to decide on the allocation of pages between the sections.

However, the overall page limit will be strictly applied and applicants must keep the proposal within the limits. The expert evaluators will disregard any excess pages above the 32-page limit, since all pages in excess will automatically be blanked out once the application is submitted.

Literature references should be listed in footnotes with font size 8. All footnotes will count towards the page limit.

Document 2 (part B2): must consist of Part B sections 4-5. No overall page limit will be applied to this document, but applicants should respect the instructions given per section (e.g. in section 5, a maximum of one page should be used per beneficiary and half a page per associated partner).

Note that applicants will not be able to submit their proposals in the submission system unless both documents 1 and 2 are provided.

Size limit of the documents: Please note that the maximum size for each document is 10 MB. The upload of any documents above this size limit will fail in the submission system. Applicants are reminded to test the system in advance, and avoid submitting their proposal at the last minute.

The minimum font size allowed for the main text and tables is 11 points. Text elements other than the body text, such as headers, foot/end notes, captions, formulas, etc. may deviate, but must be legible and not be less than 8 points. Standard character spacing and a minimum of single line spacing has to be used. The page size is A4, and all margins (top, bottom, left, right) should be at least 15 mm (not including any footers or headers). The reference font for the body text of proposals is Times New Roman (Windows platforms), Times/Times New Roman (Apple platforms) or Nimbus Roman No. 9 L (Linux distributions).

entree like in entre to the first in the first in the contract

Excess pages will be cut off!

Follow the guidance!

Do not alter, move or delete tags!

Do not attempt to outsmart the formatting rules!

Step 5: check list associated partners

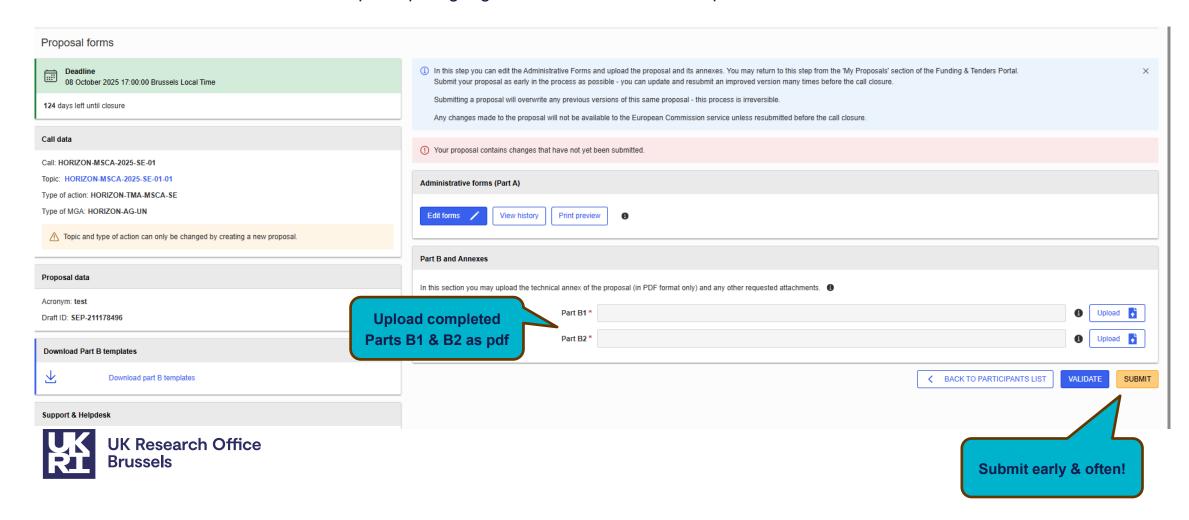
- ✓ included as a 'Partner' in Part A (even if not requesting EC funding)
- ✓ included in budget table of from countries eligible for funding (LMIC)
- ✓ encoded zero (0) "number of seconded researchers" and zero (0) "number of person months" if not eligible or not requesting funding
- ✓ if applicable: justification for requesting exceptional funding in Part B1, Section 3.2
- √ fully integrated throughout ALL of part B1
- ✓ included in Table 6 of part B2





Step 6: Submission

- Part B1: "the proposal"; sections correspond to evaluation criteria (excellence, impact, implementation); maximum 32 pages
- Part B2: contains information on participating organisations, inter-relationship declaration

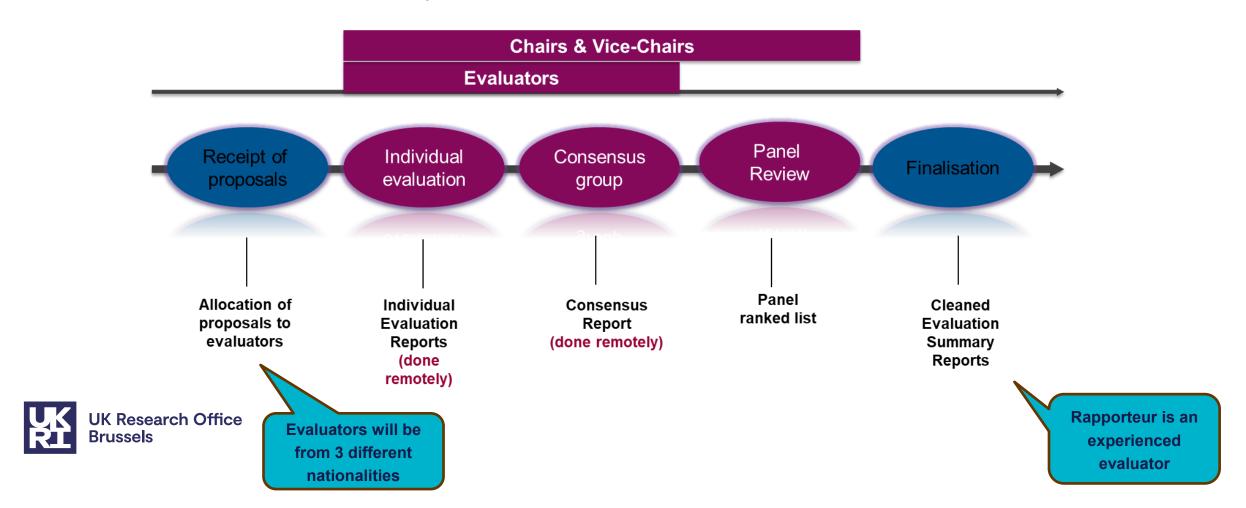


The Evaluation

Evaluation Workflow

Evaluators can reject allocation if outside their expertise or conflicts exist

- automatic pre-allocation of 3 evaluators by REA based on MSCA keywords
- Scores range from 5 (excellent) to 0 (fails) scores & comments are based on consensus of evaluators
- additional evaluators can be involved if required



Evaluation Criteria

- outlined in the Work Programme
- criteria correspond to sections in the call template Part B1
- use the MSCA SE Handbook

Make it easy for the evaluators to find the information

Read all relevant guidance documents & policies

Excellence (50%)	Impact (30%)	Quality & efficiency of the implementation (20%)		
Quality and pertinence of the project's research/innovation objectives (and the extent to which they are ambitious, and go beyond the state of the art)	Developing new and lasting research collaborations, achieving transfer of knowledge between participating organisations and contributing to improving research and innovation potential at the European and global level	Quality and effectiveness of the work plan, assessment of risks and appropriateness of the effort assigned to work packages		
Soundness of the proposed methodology (including interdisciplinary approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the quality of open science practices)	Credibility of the measures to enhance the career perspectives of staff members and contribution to their skills development	Quality, capacity and role of each participant, ncluding hosting arrangements and extent to which the consortium as a whole brings together the necessary expertise		
Quality of the proposed interaction between the participating organisations in light of the research and innovation objectives.	Suitability and quality of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities	Use clear language 8 explain jargo		
	The magnitude and importance of the project's contribution to the expected scientific, societal and economic impacts	Invest time in writing & proof-reading		

Scoring & Ranking

We cannot give out the ranking of individual proposals

- proposals are funded in ranking order per panel
- final ranking is approved by panel vice-chairs
- equal scores: prioritisation decided by panel, based on scores for award criteria
- distribution of the indicative budget is proportional to the number of eligible proposals received in each panel
- distribution of scores and cut-offs published on call page

Ex-aequo proposals: prioritised according to Excellence, then Impact



If things don't go as planned...

Reserve List

for proposals above threshold but outside of available funding

 proposals in the reserve list can be promoted to the main list until the end of the year following the call deadline (for the 2025 call – until 31 December 2026)

Redress

- process for redress outlined in decision letter
- scores can decrease during the additional evaluation

Resubmission is not restricted



We cannot give out the position on the reserve list

Majority of reserve list promotions should be finalised by late summer/early autumn Resources & Timelines



The 2025 Call Timeline

The call page is hosted on **EU Funding & Tenders Portal**

Action	Date
Invitation to submit proposal	27 March 2025
Deadline for submission	8 October 2025 (17:00 Brussels Time)
Information on outcome of evaluations	March 2026
Indicative date for signing the grant agreement	June 2026
Prospective start date	from September 2026



Submit Early, Submit Often!

Commission collects proposals at the deadline

Additional Resources

Horizon Europe MSCA - How to apply - European Commission

Staff Exchanges- Marie Skłodowska-Curie Actions

MSCA Financial Guide

MSCA-NET for SE

2025 MSCA Work Programme

Funding & Tender Opportunities Portal

Horizon Europe Strategic Plan

Horizon Europe Programme Guide







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