



# Making the Most of Your MSCA Postdoctoral Fellowship

A Webinar for Researchers

*Tuesday 17 September, 10h00-13h00 CEST*



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**slido.com**  
**#MSCAPF24**

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# Agenda

<b>10:00 – 11:15</b>		
<b>Session 1</b>		
10:00 – 10:05	<b>Opening Remarks</b>	Christopher REYNOLDS
10:05 – 10:15	<b>Welcome to the MSCA</b>	Christopher REYNOLDS
10:15 – 10:35	<b>Postdoctoral Fellowships: A Brief Introduction</b>	Bronius GOOSSENS
10:35 – 11:00	<b>MSCA-PF Budgets</b>	Eleni KARAKITSOU
11:00 – 11:20	<b>Continuous Reporting</b>	Valentina IMPARATO
<b>11:30 – 13:00</b>		
<b>Session 2</b>		
11:30 – 11:50	<b>The Researcher Mobility Declaration</b>	Edyta NIEMCZAK
11:50 – 12:10	<b>Open Science</b>	Francesco Paolo MANCINI
12:10 – 12:30	<b>Project Reporting</b>	João NERES
12:30 – 12:50	<b>Communication, Exploitation &amp; Dissemination</b>	Dimitris KAGANIS
12:50 – 13:00	<b>Summing Up &amp; Final Q&amp;A</b>	Christopher REYNOLDS



# Questions & Survey

## Who are you?

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# Understanding the MSCA

*Christopher REYNOLDS*



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# The Marie Skłodowska-Curie Actions

 Since 1996

Researcher Training  
and Mobility



International and Inter-Sectoral



150,000 +

Bottom-Up Approach





*Science is essentially international,  
and it is only through lack of the  
historical sense that national  
qualities have been attributed to it*

**Marie Skłodowska-Curie**

# Who are we?



## DG Education, Youth, Sport and Culture (DG EAC)

- Political responsibility

## European Research Executive Agency (REA)

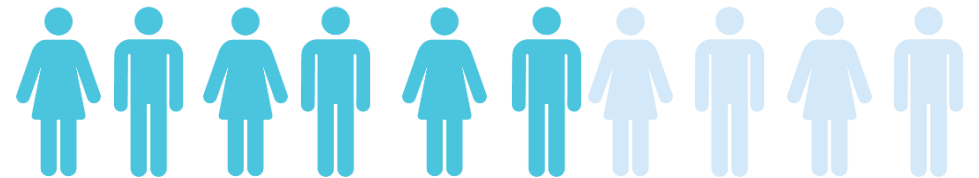
- Programme management



## The MSCA-PF team @ REA



## 60 Project Officers



# Horizon Europe (2021-2027)



Overall budget:

**€95.5 billion**

(+30% compared to H2020)

**MSCA: ca. €6.6 billion**





# MSCA-PF 2023 Call Statistics

**€260,47 m**  
Call budget

**8,039**  
Number of proposals received

**1,249**  
Number of main list proposals

**16%**  
Overall success rate

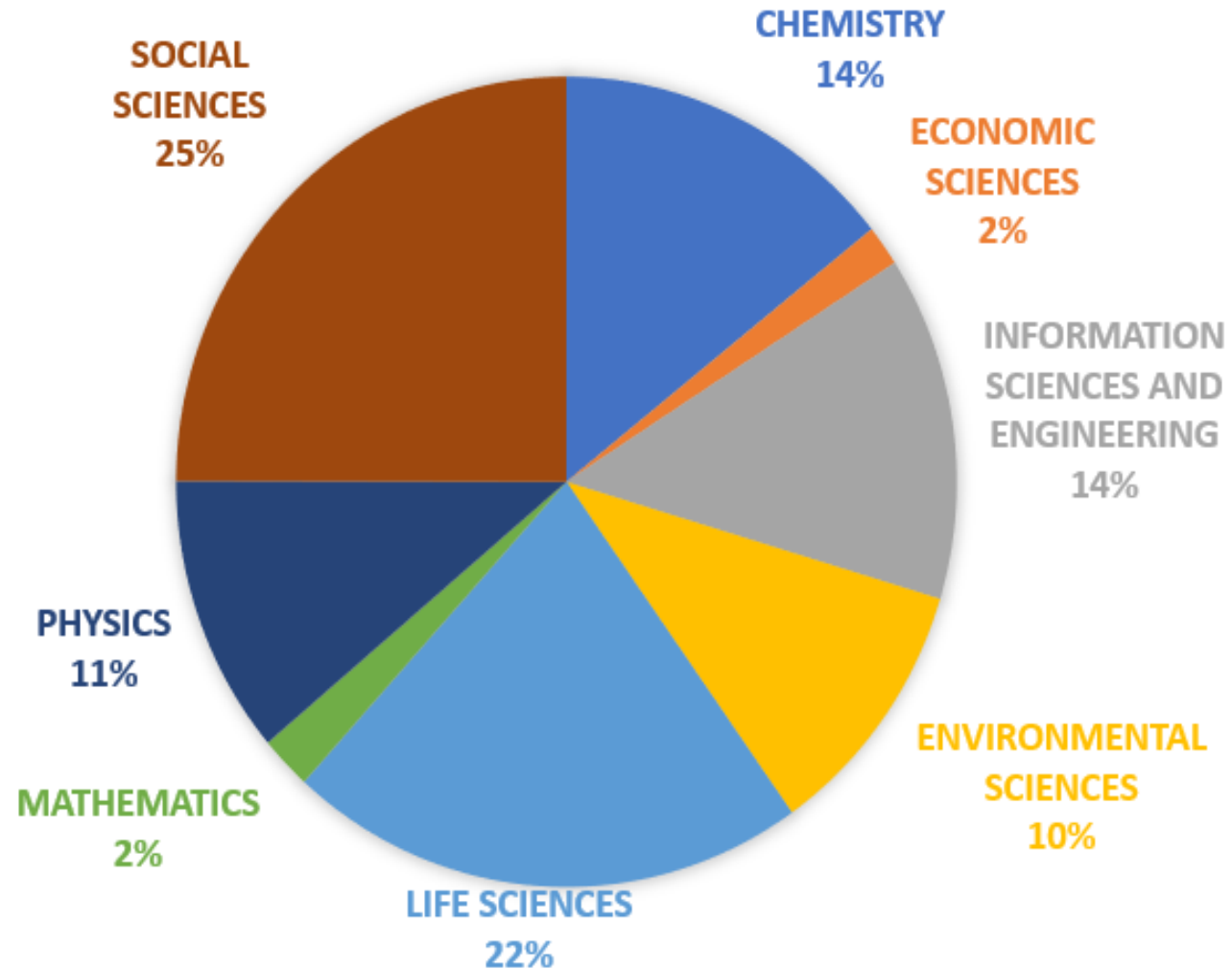
**188**  
Highest overall number of successful proposals (Spain)

**21.88%**  
Highest success rate (Belgium)

**+1,300**  
Proposals receiving the Seal of Excellence (85%+)



# MSCA-PF 2023 Submission Statistics



# Who are MSCA-PF researchers?



57%



43%



35 years old



Social Sciences / Life Sciences



# Questions & Survey

## Who are you?

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# MSCA Postdoctoral Fellowships A Brief Introduction

**Bronius GOOSSENS**



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# Who is Who?



## YOU

- ✓ Researcher
- ✓ MSCA "Fellow"
- ✓ Must work full-time & exclusively on project (unless otherwise agreed)



## Beneficiary/ Host institution

- ✓ Institution recruiting you (employment contract)
- ✓ Must host you at its premises (return phase in GF)
- ✓ Receives payment from REA



## Associated Partner(s)

- ✓ Secondment Host
- ✓ Outgoing Phase Host (GF)
- ✓ Non-Academic Placement (NAP) Host



## REA

- ✓ The "EU"
- ✓ Granting Authority
- ✓ Project Officer
- ✓ [EU Whoiswho](#)



# MSCA-PF: One Programme, Two Schemes



## European Postdoctoral Fellowships

**Duration:** 12-24 months (+ NAP, if applicable)

**Mobility:** moving (or recently moved) to or between EU MS/AC

**Beneficiary:** Host institution in an EU MS/AC\*\*

## Global Postdoctoral Fellowships

**Duration:** 24-36 months (+ NAP, if applicable)

**Mobility:** 12-24 months **outgoing phase** (Third Country) + **mandatory** 12 month **return phase** to EU MS/AC

**Beneficiary:** Return phase host in an EU MS/AC

### Optional:

- ✓ **Secondment(s):** up to max. 1/3 of the project duration (EF)\* or max 1/3 of outgoing phase (GF) to academic/non-academic institution(s), anywhere in the world. Can be split into multiple periods. Must be in the Grant Agreement
- ✓ **Short stays:** limited periods – to anywhere in world – for field work, short research visits, conferences, etc
- ✓ **Non-Academic Placement (NAP):** additional period of up to 6 months in a non-academic institution (in an EU MS/AC) after the end of the standard project duration (for EF) or after the end of return phase (for GF). Must be in the original proposal and in the Grant Agreement



\* Excluding NAPs

\*\* EU MS/AC: EU Members States/Associated Countries

# Essential Reference Documents & Contacts



**The Grant Agreement**

**Your Employment Contract**

**Info Package for MSCA Fellows**

**MSCA Financial Guide**



**Scientific Supervisor**

**Admin. Contact (HR)**

**MSCA National Contact Point (NCP)**

**REA Project Officer**





# MSCA Project Lifecycle



# The Funding & Tenders Portal: Your Project Hub



European Commission | EU Funding & Tenders Portal

Welcome [User Name]

HOME SEARCH FUNDING & TENDERS HOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT

MY PERSON PROFILE  
MY ORGANISATION(S)  
GRANTS  
**My Project(s)**  
TECHNICAL SUPPORT INSTRUMENTS  
Monitor requests  
Monitor projects  
MY FORMAL NOTIFICATION(S)

My Project(s) [Need help?](#)

Results: 218

ACRONYM	TOPIC ID	PROGRAMME	PROJECT	PHASE	ACTIONS
[Redacted]	HORIZON-MSCA-2021-PF-01-01	HORIZON	[Redacted]	Active	<b>Actions</b> Manage Consortium <b>Manage Project</b> Manage Cascade Funding Calls



# The Funding & Tenders Portal: Grant Management



RESEARCH & INNOVATION  
European Commission  
Grant Management Services  
Bronius GOOSSENS

MY PROJECT  
Call: HORIZON-MSCA-2021-PF-01  
Type of Action: HORIZON-TMA-MSCA-PF-EF  
Acronym: [redacted]  
Current Phase: Grant Management  
Number: [redacted]  
Duration: 24 months  
GA based on the: HE Unit MGA - Multi & Mono - 1.null  
Start Date: 01 Feb 2023  
Estimated Project Cost: €0.00  
Requested EU Contribution: [redacted]  
Contact: Bronius GOOSSENS

Continuous Reporting  
01 Feb 2023  
Started [progress bar] Completed

Process documents  
Deliverable Assessment (1)  
Deliverables (3)

Process communications

Process history

Launch new interaction with the EU +

Shows the last status of your legal Data  
Grant Agreement  
To communicate with the Project Officer

AMD-[redacted]-3  
All messages  
AMD-[redacted]-2  
GAP-[redacted]  
AMD-[redacted]-1  
DLV-[redacted]  
AMD-[redacted]-3  
Project messages

ONLINE MANUAL  
HOW TO

## Your central hub for:

- ✓ Contacting your Project Officer
- ✓ Submitting documents (e.g. reports, deliverables, formal notifications...)
- ✓ Consulting documents (e.g. grant agreement)
- ✓ Links to Online Manual & HOW TO





# Key Points to Remember

## The Grant Agreement is a legal contract between REA and your Host Institution

- ✓ You & your host institution are together supposed to deliver the project as proposed
- ✓ Any problems or changes need to be communicated to REA

## Your Employment Contract is with your Host Institution, not with REA

- ✓ Your host is your first point of contact in case of questions, problems, etc

## You must work full-time and exclusively on your project

- ✓ Unless you have agreed otherwise with your Host & REA (e.g. part-time work, suspension)

## Secondments

- ✓ To academic/non-academic institution(s) anywhere in the world
- ✓ Must be indicated in grant agreement

### *For European Fellowships:*

- ✓ Up to max. 1/3 of project duration

### *For Global Fellowships:*

- ✓ Maximum 1/3 of the outgoing phase
- ✓ Not permitted during the return phase

## Non-Academic Placements

- ✓ Up to 6 months at non-academic host, after the “normal” end of the project.
- ✓ Cannot be added later (must be in original proposal)





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# MSCA-PF Budgets

*Eleni KARAKITSOU*



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# Budget Categories



Contributions for Recruited Researchers Per person-month					Institutional Unit Contributions Per person-month	
Living Allowance	Mobility Allowance	Family Allowance <i>(if applicable)</i>	Long-Term Leave Allowance <i>(if applicable)</i>	Special Needs Allowance <i>(if applicable)</i>	Research, Training & Networking	Management & Indirect Contribution
€5,080*	€600	€660	<i>Applicable rate x % covered by beneficiary</i>	<i>Requested unit x (1/number of months)</i>	€1,000	€650

\* multiplied by the country correction coefficient to ensure equal treatment and purchasing power parity for all researchers

## Funding mechanism:

- ✓ Fully based on unit costs
- ✓ 1 person-month = 1 unit
- ✓ 1 unit = 1 month of implemented work
- ✓ **Total costs = costs per unit x number of units**

Revised rates  
for Living & Mobility Allowances  
**apply only for 2024 call onwards**



# What do the Costs Cover?



## Contributions for Recruited Researchers Per person-month

Living Allowance	Mobility Allowance	Family Allowance <i>(if applicable)</i>	Long-Term Leave Allowance <i>(if applicable)</i>	Special Needs Allowance <i>(if applicable)</i>
<p><b>Monthly gross salary</b> before compulsory deductions &amp; taxes, e.g. employer &amp; employee social security contributions (net amount varies)</p>	<p><b>Researcher's private mobility</b></p> <p>Note: <u>Project-related costs</u> are covered by the RTN contribution</p>	<p><b>Family obligations</b> acquired before or during the project</p> <ul style="list-style-type: none"> <li>• <b>Marriage or equivalent</b> (legally recognised)</li> <li>• <b>Dependent children</b></li> </ul>	<p>Researcher's <b>leave longer than 30 consecutive days:</b></p> <ul style="list-style-type: none"> <li>• <b>Maternity leave</b></li> <li>• <b>Parental leave</b></li> <li>• <b>Sick leave</b></li> <li>• <b>Special leave</b></li> </ul>	<p>Acquisition of special needs items &amp; services for <b>researchers with certified disabilities</b></p>





# What do the Costs Cover?



Institutional Unit Contributions Per person-month	
Research, Training & Networking (RTN)	Management & Indirect Contribution
<p>Costs related to the <b>training &amp; research expenses</b> of researchers &amp; costs related to the <b>networking activities</b></p> <p>For example:</p> <ul style="list-style-type: none"><li>• Attendance at conferences, seminars</li><li>• Lab material, laptops, disposables...</li><li>• Visa-related fees (even if before the recruitment date)</li><li>• Costs for secondments, non-academic placements &amp; outgoing phase travel for GF</li></ul>	<p><b>Beneficiary's additional costs</b> in connection with the <b>implementation of the project</b></p> <p>For example:</p> <ul style="list-style-type: none"><li>• Personnel costs for project management</li><li>• Indirect costs related to project implementation</li><li>• Overheads</li></ul>



# Payments



All payments are **made to the beneficiary** responsible for the implementation of the project

## Pre-financing (70%)

Beginning of project

65% beneficiary  
5% Mutual Insurance  
Mechanism

## Interim Payment (GF only)

Upon approval  
of Interim Report

## Final Payment (Balance)

Upon approval of  
Final Report



When **Associated Partners** are involved, we encourage  
a **Partnership Agreement** to regulate the relationship between all  
participating organisations (payments, IPR, etc.)

**This Agreement must comply with the grant agreement**



# Budget Modifications



## Budget Increase

If during the project **an allowance is added**

- ✓ Family allowance
- ✓ Long-term leave
- ✓ Special Needs allowance

## Early Termination

**Budget is re-calculated** based on the **new end date**

- ✓ Final payment is reduced
- ✓ Recovery process is initiated

## Budget Reduction

If at the **end of the project**

- ✓ Substantial errors irregularities
- ✓ Fraud
- ✓ Serious breach of contractual obligations



# What if you have unused funds?



- ✓ Unused funds (institutional costs) can – **with the agreement of the beneficiary** – be used to **support your research *after the end of the project***, but not to extend your project
- ✓ **Transfers between budget categories** are in principle NOT possible, but there is **some budget flexibility** (only in agreement with your beneficiary):
  - ✓ **Research, Training and Networking costs:** e.g. unused amounts to increase the salary of the researcher, organise additional training activities, etc.
  - ✓ **Management and Indirect costs:** unused amounts to increase the salary of the researcher



# Key Points to Remember



- ✓ **Total amount of the grant** is indicated in the grant agreement, including the breakdown per category
  
- ✓ These amounts are **for working full-time** and **exclusively on the project**. If you work part-time, they are reduced proportionally
  
- ✓ There are **2 types of costs**:
  - ✓ **Researcher costs** to cover researcher's own private costs
  - ✓ **Institutional costs** to cover the costs of implementing the project
  
- ✓ The **living allowance** is multiplied by a **country correction coefficient** to reflect the cost of living in the country in which the researcher is recruited





## Key Points to Remember

- ✓ **Living allowance, mobility allowance** and **family allowance** are **gross amounts** subject to compulsory deductions and national taxation (in most cases). This can vary from country to country and between beneficiaries in the same country (different employer contributions, pension schemes, etc.)
- ✓ These amounts can be **topped up**, but only by your beneficiary or by an Associated Partner named in Annex 1 of the grant agreement
- ✓ The **long-term leave allowance** and the **special needs allowance** are additional budget which can be paid to **the beneficiary** for additional costs that may be incurred
- ✓ Any **supplementary professional activities** require a shift to **part-time implementation** or an **interruption** of the fellowship





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# Continuous Reporting

**Valentina IMPARATO**



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# Implementation of the Project



## Continuous Reporting

- ✓ Deliverables
- ✓ Publications
- ✓ Results, etc...

## Changes to the project

- ✓ Amendments
- ✓ Formal notification



# Continuous Reporting Module



## Way to monitor your project

- ✓ Online tool used to **submit updates and documentation related to the project's progress** throughout its lifecycle
- ✓ The module is active from the start date of the project and remains available 4 years after its completion
- ✓ Should be kept updated **continuously** during the lifetime of the project
- ✓ Data encoded are **automatically** transferred into the *Periodic Report* module at the end of the reporting period



# Continuous Reporting



The screenshot displays the 'EU Funding & Tenders Portal' interface. The top navigation bar includes 'HOME', 'SEARCH FUNDING & TENDERS', 'HOW TO PARTICIPATE', 'PROJECTS & RESULTS', 'WORK AS AN EXPERT', and 'SUPPORT'. The left sidebar contains 'MY PERSON PROFILE', 'MY ORGANISATION(S)', 'GRANTS', 'My Project(s)', 'TECHNICAL SUPPORT INSTRU...', 'Monitor requests', 'Monitor projects', and 'MY FORMAL NOT'. The main content area is titled 'My Project(s)' and shows a table of projects. The first project is 'HORIZON-MSCA-2021-PF-01-01' under the 'HORIZON' programme, in the 'Active' phase. The 'Actions' column for this project is expanded, showing options: 'Manage Consortium', 'Manage Project', and 'Manage Cascade Funding Calls'. The 'Manage Project' option is highlighted with a red box and a red arrow. Below the table, a 'Project Continuous Report' dashboard is visible, showing a progress bar for 'Periodic Reporting' (01/03/2022 to 30/04/2024) and 'Continuous Reporting' (09 Aug 2022). The dashboard includes a table of reporting categories with status indicators (green checkmarks or blue information icons).

ACRONYM	TOPIC ID	PROGRAMME	PROJECT	PHASE	ACTIONS
	HORIZON-MSCA-2021-PF-01-01	HORIZON		Active	Manage Consortium Manage Project Manage Cascade Funding Calls

Category	Status
Summary for publication	✓
Deliverables	i
Milestones	i
Critical Risks	✓
Publications	i
Results	✓
Disseminat... activities	✓
Communic... Activities	✓
Standards	✓
Intellectual property rights (IPR)	✓
Datasets	✓
Mobility	✓
Impact	✓
Impact Continuation	✓
Other Results	✓



# Continuous Reporting



Project Continuous Report														
Summary for publication	Deliverables	Milestones	Critical Risks	Publications	Results	Disseminat... activities	Communic... Activities	Standards	Intellectual property rights (IPR)	Datasets	Mobility	Impact	Impact Continuation	Other Results
✓	i	i	✓	i	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

## Deliverables

- ✓ **Data Management Plan** (within 6 months of start)
- ✓ **Career Development Plan** (within 6 months of start)
- ✓ **Communication, Dissemination & Exploitation Plan**  
(1 month before the end of project)
- ✓ **Ethics Deliverables** (*only for projects with Ethics requirements*)



If encoded as Public (PUB) -  
Publicly available on [Cordis](#)

No scientific deliverables should  
be submitted to REA



# Continuous Reporting – Deliverables



## Data Management Plan (DMP)

- ✓ Due within first 6 months
- ✓ Describes how research data will be handled during and after the project
- ✓ Describes how research data will be shared, curated and preserved

Template available: [F&T Portal](#)



## Career Development Plan (CDP)

- ✓ Due within first 6 months
- ✓ Outlines training requirements for your research objectives & career goals
- ✓ Plan to achieve your project & research objectives, and to develop your scientific career

Template available: [REA website](#)



## Communication, Dissemination & Exploitation Plan (CDEP)

- ✓ Due 1 month before the end of the project
- ✓ Outlines the communication, dissemination & exploitation activities planned for your project
- ✓ Describes how you intend to communicate, disseminate & exploit the results of your research

Template available: ask your PO



# Changes to the Project



## Amendments and Formal Notifications

- ✓ The Grant Agreement (between host & REA) is a **legal contract**
- ✓ **Any changes** to the Grant Agreement conditions, including its annexes (e.g. to the proposed work or the way the project is implemented), **require mutual consent of the parties** (REA & host institution)
- ✓ The **Host Institution** (the beneficiary) is responsible for requesting/signing the change request



Always discuss with your Project Officer beforehand



# Changes to the Project



## Amendments

Substantive or important changes to the Grant Agreement or its annexes

For Example:

- ✓ **Substantial deviations from original project plan:** e.g. changes impacting the project outcome, changes affecting the description of the action in Annex 1
- ✓ **Change to secondment host / NAPs,** etc
- ✓ **Early termination** (e.g. permanent position at another institution)
- ✓ **Others:** Increase in the maximum grant amount, changes of duration



## Formal Notifications

Changes without a significant impact on the Grant Agreement or its annexes

For Example:

- ✓ **Change of scientific supervisor**
- ✓ **Changes without significant impact on the Grant Agreement**
- ✓ **Changes affecting your ability to implement the project as planned** (e.g. difficulty to travel, unavailability of key infrastructure, resources, etc. – see Article 19.3 of the grant agreement)

*\* Amendments should not call into question the decision awarding the grant or breach the principle of equal treatment of applicants*



[Amendments - Online Manual - Funding Tenders Opportunities \(europa.eu\)](#)

[Amendments - IT How To - Funding Tenders Opportunities \(europa.eu\)](#)

# Changes to the Project



RESEARCH & INNOVATION  
Grant Management Services

MY PROJECT

Periodic Reporting  
REP-101064169-1 - period  
01/02/2023 > 31/01/2025

01 Mar 2024

Draft Submitted Observations Paid

Launch new interaction with the EU +

Technical Part contribution

Call: HORIZON-MSCA-2021-PF-01  
Type of Action: HORIZON-TMA-MSCA-PF-01

Acronym  
Current Management  
Number  
Duration  
GA based  
Multi S  
Start Date  
Estimate  
Request  
€165,312  
Contact

Launch new interaction with the EU

Choose one of the options below

**Request for Amendment** - Process revised! More Info on the Online Manual and the IT Help to wiki.  
Including notification on termination of the participation of one or more beneficiaries.  
Choose the data set based on which you would like launching a new amendment request:  
 latest legal data

Launch

**Grant Agreement Termination by beneficiaries**  
**Attention!** This option is reserved for the termination of the grant agreement. The termination of the grant agreement is considered as a last resort measure, if all other efforts to continue the action fail. Termination is irrevocable and comes into force immediately after signature and submission. You are advised to consult the available guidance of the corresponding funding programme or contact the responsible officer in charge of your grant agreement.

Launch

**Formal Notification**  
**Attention!** The use of the formal notification channel is reserved for specific purposes e.g. for communication as set out in the model grant agreement (MGA) e.g. obligation to provide information upon request or obligation to inform).  
If you wish to interact with officers, please use the messaging facility ( see below ).

Launch

**Communication to the Project Officer**  
At any time, you may wish to informally exchange messages or ask questions to the Service via the electronic system. If your query is related to an ongoing process, you're encouraged to use the messages section of that process.

Launch





# Changes to the Project



## Amendments (AMD)

- ✓ Always Inform & **discuss with PO - Preliminary check**
- ✓ **Beneficiary** launches the process via the Portal and sends to the EU for Review - **Assessment**
- ✓ Verification by **REA**
  - ✓ AMD accepted and countersigned
  - ✗ AMD sent back for revision or rejected



WHEN to send an AMD request?  
**Well before the project *original* end date**





# Implementation of the Project

European Commission | Online Manual

EU Funding & Tenders Portal

Search by keywords

Online Manual / Grants

## Grant management

- Keeping records
- Amendments
- Deliverables & milestones
- Reports & payment requests
- Acknowledgement of EU funding
- Dissemination & exploitation of project results
- Checks, audits, reviews & investigations
- Communication with the granting authority

**HOW TO**

- Keeping records
- Amendments
- Continuous reporting on milestones & deliverables
- Reports & payment requests
- Communicating your project — Acknowledgement of EU funding
- Dissemination & exploitation of project results
- Checks, audits, reviews & investigations
- Communication with the granting authority



## How To guide

[Grant management - Online Manual - Funding Tenders Opportunities \(europa.eu\)](https://europa.eu)



# Key Points to Remember

- ✓ Formal Deliverables to be submitted in the Continuous Reporting module by the deadlines indicated
- ✓ No scientific deliverables to be submitted to REA
- ✓ Always discuss with your Project Officer beforehand any modifications in your project
- ✓ The Host Institution requests the AMD, not the researcher
- ✓ Any changes must be processed and approved by REA *before* they take effect





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# Making the Most of Your MSCA Postdoctoral Fellowship

**Short break – back soon!**

A W

*Tuesday 17 September, 10h00-13h00 CEST*



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# Completing the Researcher Mobility Declaration

**Edyta NIEMCZAK**



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# MSCA Project Lifecycle



# Reporting on "Mobility" in MSCA-PF



## What?

The **Mobility tab** should contain an **accurate reflection of all periods of activity in the project**, as well as **other relevant information**:

- ✓ Full overview of all periods of work, suspensions, part-time work, long-term leave...
- ✓ Information on researcher and supervisor
- ✓ Information on **secondments** or **NAPs** (if any)

It is also the **basis for the Financial Statement/Cost Claim**, i.e. project payments are in part based on the information provided here.







# Reporting on "Mobility" in MSCA-PF

## Where?

The Mobility tab is accessible **via the project page on the Portal** (*Active Processes > Continuous Reporting data > Mobility*), as from the **project start date**.

The screenshot shows the 'RESEARCH & INNOVATION Grant Management Services' portal. The 'MY PROJECT' section displays project details for 'HORIZON-MSCA-2022-PF-01'. The 'Continuous Reporting' section is highlighted with a red box and the number '1'. A zoomed-in view of the reporting tabs is shown to the right, with the 'Mobility' tab highlighted with a red box and the number '2'. The 'Mobility' tab shows a green checkmark, indicating that reporting is complete.

Summary for publication	Deliverables	Milestones	Critical Risks	Publications	Results	Dissemination activities	Communication activities	Standards	Intellectual property rights (IPR)	Datasets	Mobility	Impact	Impact Continuation	Other Results
✓	i	i	✓	i	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓



# Reporting on "Mobility" in MSCA-PF



## When?

The Mobility Declaration should be submitted via the Portal **within 20 days of the project start date**.

It must be **kept up-to-date** throughout the lifetime of the project - the MD can be re-opened by the Project Officer at REA each time a change is required.



The MD **must always be (re-)submitted by a legal representative of the beneficiary** (i.e. your host institution);  
not by yourself as the project researcher



# Reporting on "Mobility" in MSCA-PF



## What does it contain?

1		HORIZON-..		Summary for publication	Deliverables	Milestones	Critical Risks	Publications	Results	Disseminat... activities	Communic... Activities	Standards	Intellectual property rights (IPR)	Datasets	<b>2</b> Mobility	Impact	Impact Continuation	Other Results
Call: HORIZON-MSCA-2023-PF-01		Topic: HORIZON-MSCA-2023-PF-01-01		✓	i	i	✓	i	✓	✓	✓	✓	✗	✓	✓	✓	✓	✓

### Researchers Mobility

Researcher					
First Name	Last Name	Gender	Nationality	Birthday	
3					

### Supervisors

Title	First Name	Last Name	Position at the host organization	Email	Start Date	End Date	<a href="#">+ Add Supervisors</a>
4							

### Mobility Declarations

Phase	Destination Organisation	Sector of Destination Org.	Country	Start date	End date	Contract Type	Family Charges	Working Time Commitment	Working Time (%)	Reason for Part-Time	Duration	Status	Action
5		Academic		01-07-2024	30-06-2026	A. Employment cc	No	Full-Time	100	-		DRAFT	✗ → ↻

### Secondments

Sending Organisation	Sector of Sending Org.	Country of Sending Org.	Secondment Organisation	Sector of Secondment Org.	Country of Secondment Org.	Start Date	End Date	Working Time Commitment Type	Working Time (%)	Reason for part-time	Duration
6											



# Reporting on "Mobility" in MSCA-PF



- ✓ **Researcher** information (incl. ORCID, ...) mostly as provided in the proposal but editable!
- ✓ **Supervisor** information (especially relevant in case of a change of supervisor)
- ✓ **Mobility Declarations** with all relevant information on **working patterns** (part-time), **suspension** of activities, **sick leave**, ... and on **contract type** and **family status** of the researcher (in view of rights to the family allowance)
- ✓ Information on **Secondments** or **NAP** (if any)



# Amendments linked to Mobility Declarations



## Related to Reporting Periods

**Change in working pattern** (part-time), suspension, sick leave, ... **affects the (calendar) duration of the project**

- ✓ The **host institution** should initiate an **amendment 2 months before the current end** of the reporting period to correctly reflect this information in the GA

## Related to the Budget

**Change of contract type**, a **change in the right to a family allowance**, or a long-term leave, affects the project **budget**

- ✓ The **host institution** should initiate an **amendment** circa **2 months before the current end** of the reporting period to correctly reflect this information in the GA





# Key Points to Remember

- ✓ If there is **any change to your working pattern** (due to part-time work, parental leave, sick leave, long-term leave) **notify your host institution**
- ✓ If there is any **change to your family status**, also **notify your host institution**
- ✓ Your **host institution** should complete the necessary information in the MD and **submit** it to REA (*if already submitted, the PO can reopen upon request*)
- ✓ Your **host institution** should initiate an **amendment** (if needed) at the appropriate time to align the project data



The MD must always be **submitted by your host institution**





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**#MSCA #HorizonEU @REA\_research**



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European  
Commission

# Open Science

*Francesco Paolo MANCINI*



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# Open Science in Horizon Europe and the MSCA



“Open science” means **an approach** to the scientific process based on **open cooperative work, tools** and **diffusing knowledge**

*(Horizon Europe Regulation and Model Grant Agreement)*

The concepts of **Open Science**, Open Innovation, Open to the World should ensure **excellence and impact** of the Union’s investment in research and innovation, while safeguarding the Union’s interests

*(Recital 7, Horizon Europe Regulation)*

The **MSCA** endorse Open Science ..., promoting Open Science practices through targeted **training activities**, ensuring open access to research outcomes, including **FAIR data** handling, encouraging formal and informal **science education** and **feeding back** research results into teaching and education

*(MSCA Work Programme)*



# Contents

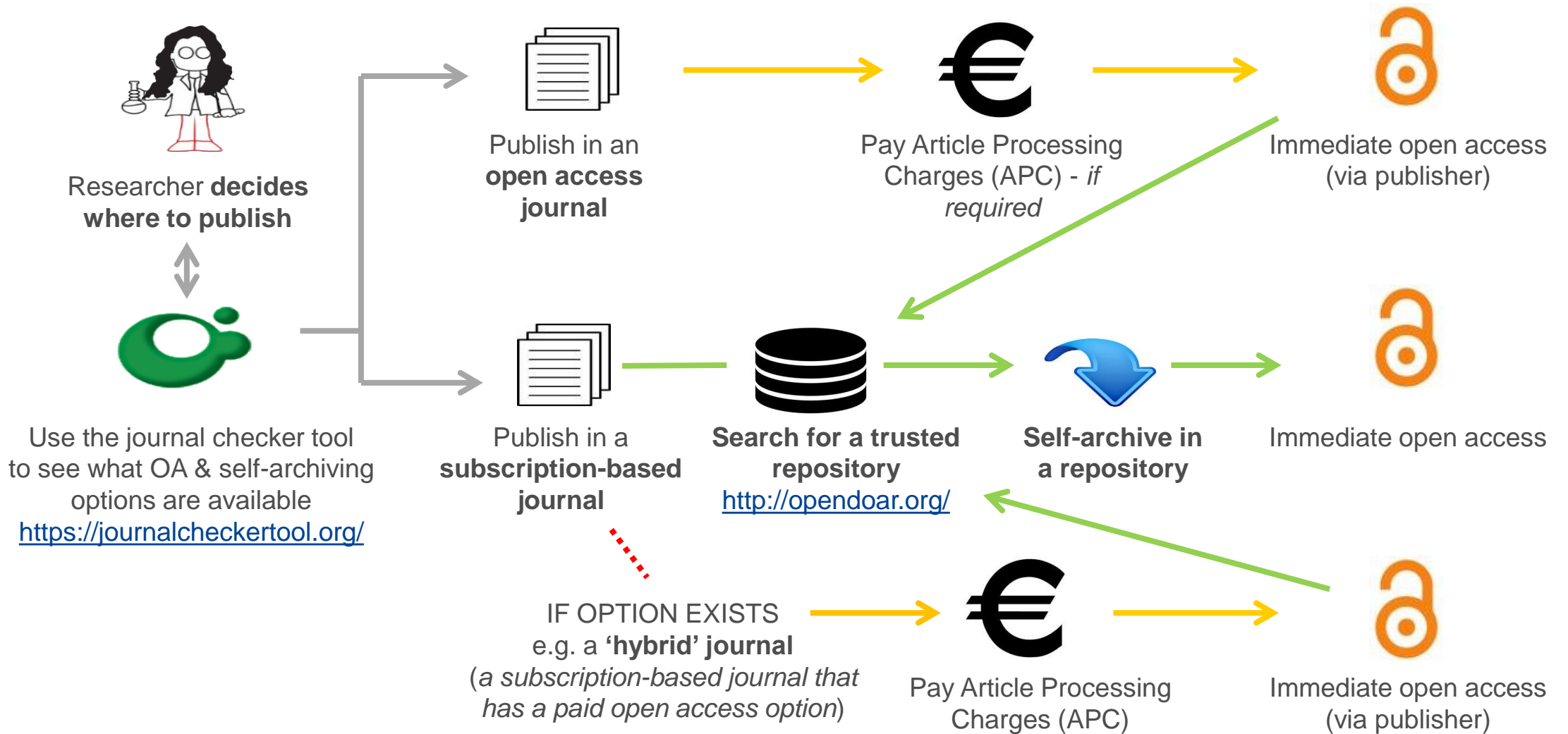


- ✓ Open Access to Scientific Publications
- ✓ Research Data Management
- ✓ Additional Optional Open Science Practices



*Adapted from Jorge Cham/Piled Higher and Deeper (PHD Comics), CC BY*

# Open Access to Publications



Adapted from Sarah Jones (<http://www.dcc.ac.uk/blog/fostering-open-science>)

# Open Access - Publications



## 2 steps for open access to publications:

1. Deposit the Author Accepted Manuscript or the Version of Record in a “**trusted repository**”
2. Immediate open access via the repository under a **Creative Commons Attribution license (CC BY)** or equivalent\*



Authors **must retain sufficient intellectual property rights** to comply with the open access requirements

- ✓ Applicable to all **peer-reviewed publications** stemming from **your MSCA project**
- ✓ **Metadata of deposited publications** must be open under **CC 0** or equivalent license
- ✓ **NO** accepted **embargo**
- ✓ **EU funding** must be correctly **acknowledged** in all publications



\* CC NC/ND licenses or equivalent are allowed for long-text formats

# Trusted Repositories under Horizon Europe



Trusted repositories are independent of the journal platform and can be grouped into 3 categories:

- ✓ **Certified** repositories (e.g., certified by international organisations or government-authorized certification bodies, like CoreTrustSeal, etc)
- ✓ **Disciplinary / domain** repositories commonly used and endorsed by the research communities (e.g., Europe PMC for life sciences, ArXiv for physics, etc)
- ✓ **General-purpose** and **institutional** repositories, or any other repositories that present the essential characteristics of trusted repositories (e.g., IRIS in Italy, HAL in France, etc)



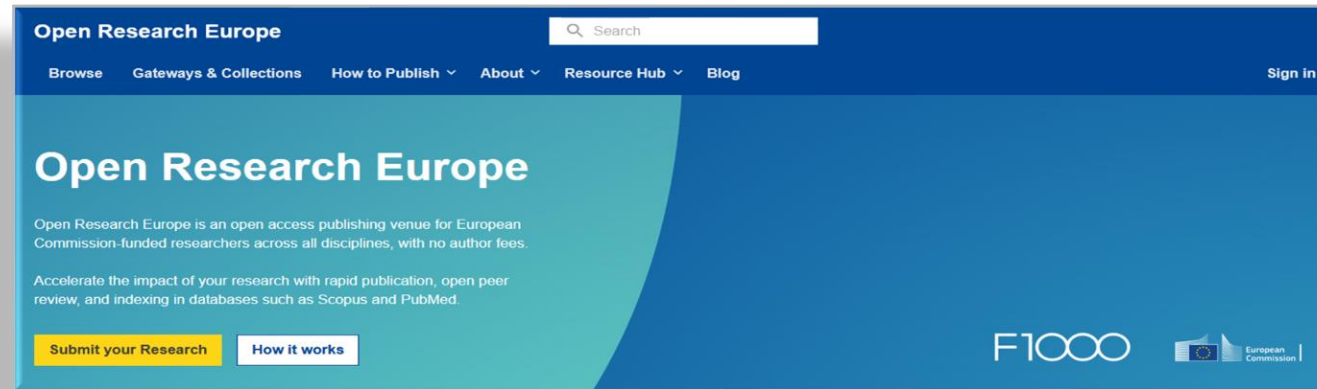
- ✓ A project website, a personal website, or networks such as **ResearchGate** or **Academia.edu** are **NOT valid repositories!**
- ✓ **Still can't find an appropriate repository?**  
Try **Zenodo**, OpenAIRE's universal repository hosted at CERN



# Open Research Europe



A high-quality, reliable and efficient open access publishing venue for EU-funded research



- ✓ **High scientific standards** (e.g. editorial policies + guidelines), expert Scientific Advisory Board across all fields of science
- ✓ **Swift publication times** and **transparent processes** (e.g. open peer-review). **No cost** to authors or beneficiaries (publication fees paid by the Commission)
- ✓ **Optional**: no obligation to publish there, but if you do, you **automatically comply with Horizon Europe policy**
- ✓ Published articles **are automatically deposited in Zenodo** and **indexed** in PubMed, Scopus, Inspec, Google Scholar, etc



<https://open-research-europe.ec.europa.eu/>

# Research Data Management



- ✓ Establish & regularly update a **data management plan** (DMP)
- ✓ Deposit the research data in a **trusted repository**
- ✓ Ensure **open access** to data - under CC BY, CC 0 or equivalent license - as specified in the DMP
- ✓ **Metadata** of deposited data **must be open** under a CC 0 or equivalent license
- ✓ Provide information about any **research output** / **tools** / **instruments** needed to **re-use or validate** the data

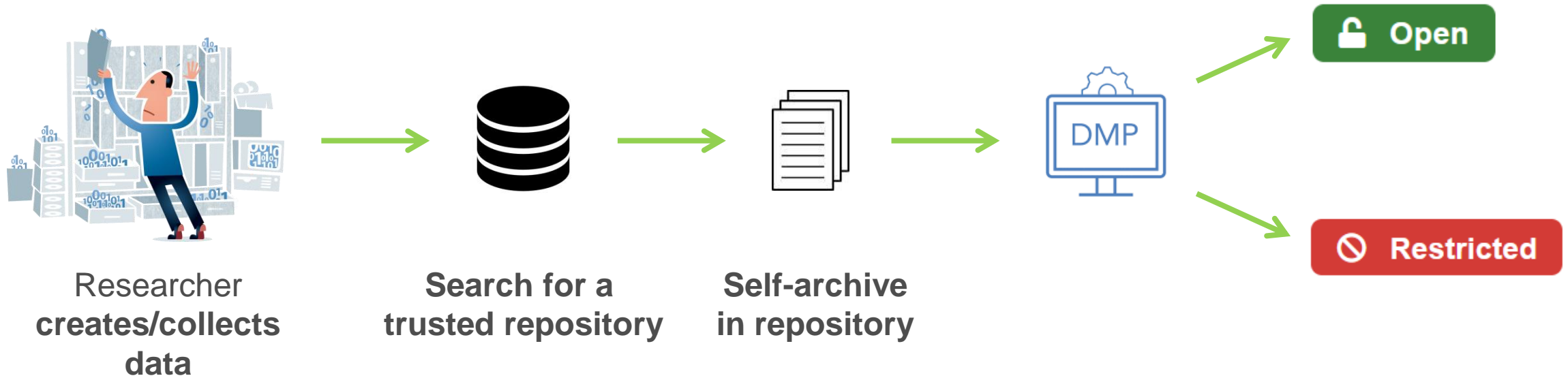


**Data may be kept closed if:**

- ✓ Making the data open access is against your legitimate interests
- ✓ It is contrary to any other constraints



# Open Access to Research Data



**‘As open as possible, as closed as necessary’**



Adapted from Sarah Jones, see also: <http://www.dcc.ac.uk/blog/fostering-open-science>



# Data Management Plan



In line with the **FAIR principles**:  
“**F**indable”, “**A**ccessible”, “**I**nteroperable”, **R**eusable”

You should maintain the DMP as a **living document** and update it over the course of the project whenever significant changes arise

## What template?

1. Template available
2. **Make sure you do not use templates that are specific to other Agencies (not ERC)**
3. Follow the guidelines, answer all questions & submit

EU Grants: Data management plan (HE):V1.1 – 01.04.2022

**DATA MANAGEMENT PLAN**

*(To be filled in and uploaded as deliverable in the Portal Grant Management System, at the due date foreseen in the system (and regularly updated).)*

**⚠️ The template is recommended but not mandatory. If you do not use it, please make however sure that you comply with the research data management requirements under Article 17 of the Grant Agreement.**

PROJECT	
Project number:	[project number]
Project acronym:	[acronym]
Project name:	[project title]

DATA MANAGEMENT PLAN	
Date:	[dd/mm/yyyy]
Version:	[DMP version]

**1. Data Summary**

*Will you re-use any existing data and what will you re-use it for? State the reasons if re-use of any existing data has been considered but discarded.*

*What types and formats of data will the project generate or re-use?*

*What is the purpose of the data generation or re-use and its relation to the objectives of the project?*

*What is the expected size of the data that you intend to generate or re-use?*

*What is the origin/provenance of the data, either generated or re-used?*

*To whom might your data be useful ('data utility'), outside your project?*

**2. FAIR data**

**2.1. Making data findable, including provisions for metadata**

*Will data be identified by a persistent Identifier?*

*Will rich metadata be provided to allow discovery? What metadata will be created? What disciplinary or general standards will be followed? In case metadata standards do not exist in your discipline, please outline what type of metadata will be created and how.*

*Will search keywords be provided in the metadata to optimize the possibility for discovery and then potential re-use?*

*Will metadata be offered in such a way that it can be harvested and indexed?*

**2.2. Making data accessible**

**Repository:**

*Will the data be deposited in a trusted repository?*





# A Tailored Data Repository for Horizon Europe

Dedicated section of [Zenodo](#):

A screenshot of the Zenodo website's dedicated section for the EU Open Research Repository (Pilot). The page features a dark grey header with the Zenodo logo, a search bar, and navigation links for 'Communities' and 'My dashboard'. On the right side of the header are 'Log in' and 'Sign up' buttons. Below the header, the main content area is white. It starts with the European Union flag, followed by the title 'EU Open Research Repository (Pilot)' and the text 'by European Commission' with a green checkmark and a URL 'https://research-and-innovation.ec.europa.eu'. To the right of this text are two buttons: a yellow 'How to submit' button and a blue 'Join with your EU project' button. Below this is a light blue horizontal bar with the text 'Research and Innovation'. Underneath is a dark blue navigation bar with links for 'Home', 'Records', 'Submit', 'Curation policy', and 'About'. The main body of the page is white and contains the heading 'Open repository for EU-funded research (Pilot)' and the subtitle 'Research outputs from Horizon Europe, Euratom and earlier Framework Programmes'. At the bottom of this section is a search bar with the placeholder text 'Search...' and a yellow 'Search' button.



# Additional Optional Open Science Practices



- ✓ Early and open sharing of research
- ✓ Research output management
- ✓ Providing open access to research outputs beyond publications and research data
- ✓ Participation in open peer-review
- ✓ Involving all relevant knowledge actors including citizens, civil society & end users in the co-creation of R&I agendas and contents





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# Project Reporting

**João NERES**



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# MSCA Project Lifecycle

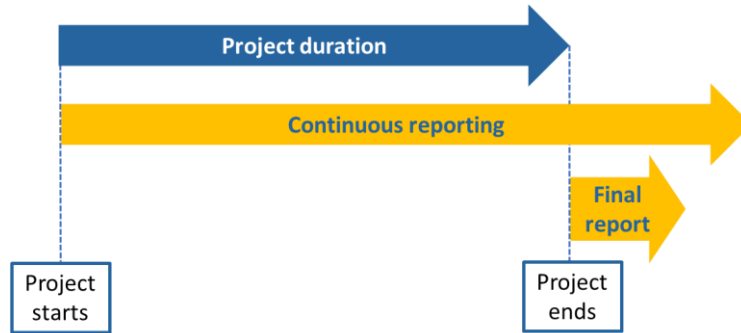


# When are the Reports due?



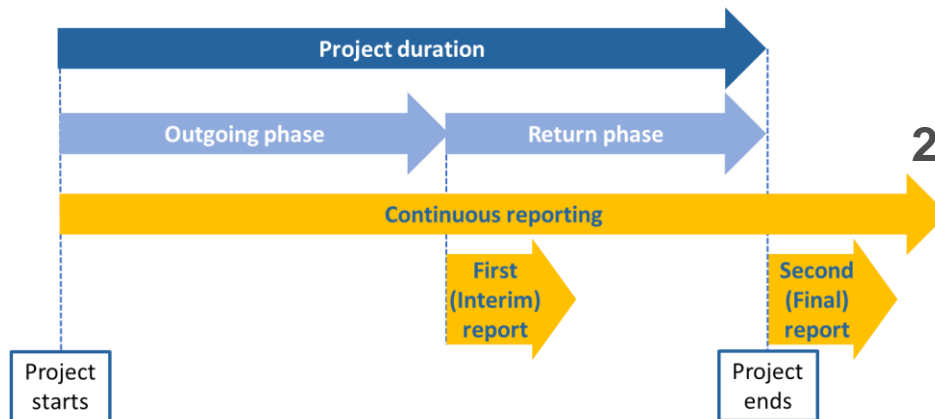
60 days after the end of the reporting period

## European Fellowships



1 reporting period  
whole project duration

## Global Fellowships



2 reporting periods  
outgoing phase &  
return phase



Amendment requests  
must be sent **well  
before the end of  
the reporting period**  
(no amendment will be  
accepted afterwards)



# Where?



European Commission | EU Funding & Tenders Portal

Welcome [User Profile]

HOME SEARCH FUNDING & TENDERS HOW TO PARTICIPATE PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT

MY PERSON PROFILE  
MY ORGANISATION(S)  
GRANTS  
**My Project(s)**  
TECHNICAL SUPPORT INSTRU...

My Project(s) Need help?

Results: 218

ACRONYM TOPIC ID PROGRAMME PROJECT PHASE ACTIONS

Launch new interaction with the EU +

Active **Actions**

- \* Manage Consortium
- Manage Project**
- Manage Cascade Funding Calls

**Periodic Reporting**  
Period 01/05/2022 > 30/04/2024  
01 May 2024  
Draft Submitted Observations Paid

Technical Part contribution  
Periodic Report composition

Process documents  
Process communications  
Process history

**Continuous Reporting**  
09 Aug 2022  
Started Completed

Continuous reporting data

Process documents

ONLINE MANUAL  
**HOW TO**

**Questions?**  
Check the online manual  
and "How to" instructions

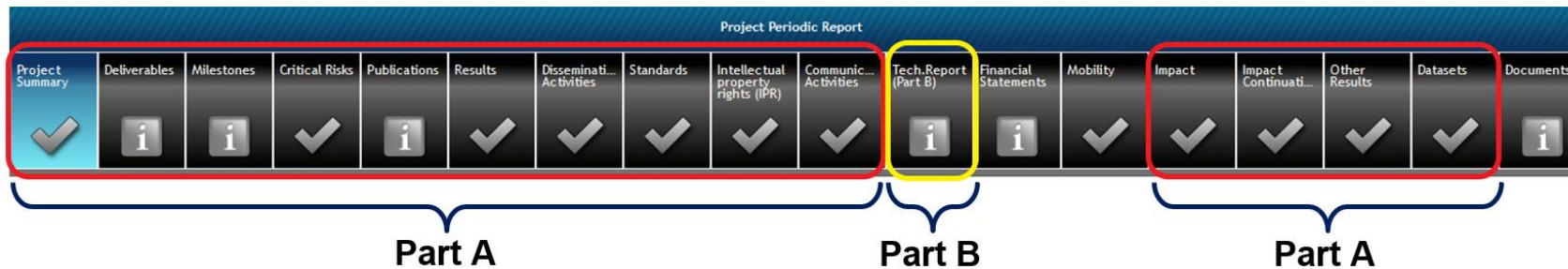
**\* Manage consortium**  
To update list of contact persons  
for the Project - done by the  
Primary Coordinator contact  
(normally, the Project Supervisor)





# Where?

## Periodic Report module



### Technical Report for the project period:

**Part A** – Information from **continuous reporting**

**Part B** – Narrative section

- ✓ **Cover page** (Project number, name, acronym & reporting period)
- ✓ **Overview** of the project implementation and progress towards its objectives, including any deviations



All **due deliverables** must be **submitted** at the latest **before the end of the reporting period.**

**Financial statement:** automatically filled in by the system.

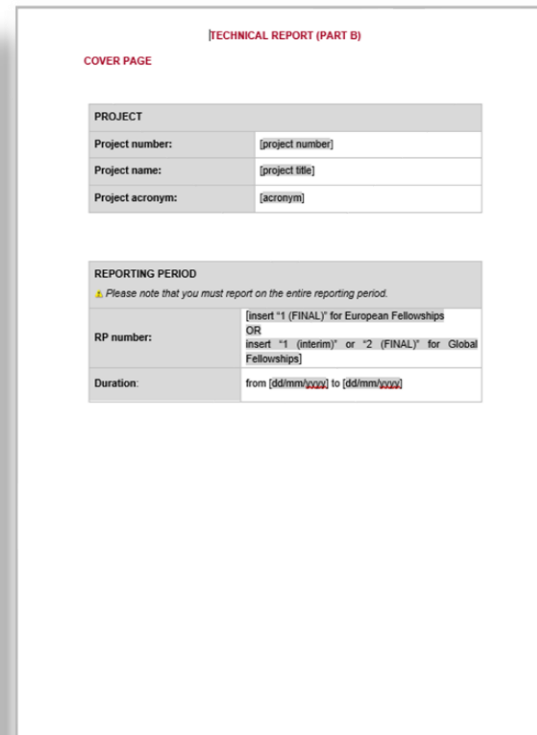
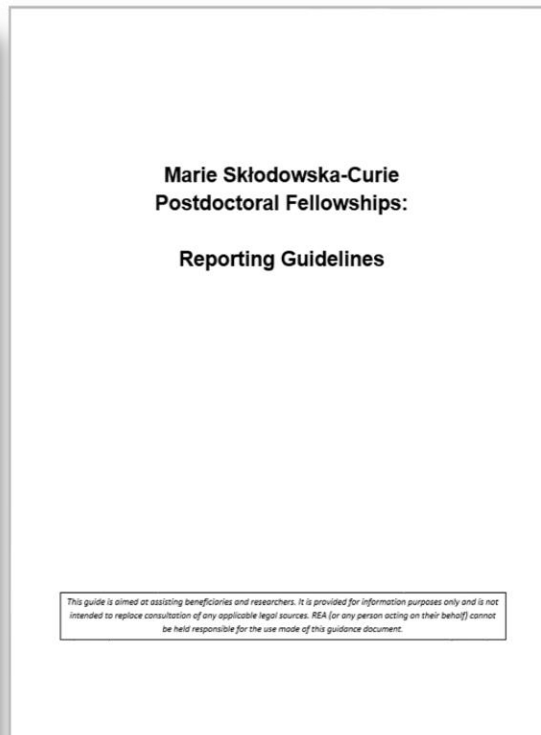
Your host institution **must check** its correctness before submission



# How?



Follow the **Guidelines** and use the **Report Template** that will be sent to you towards the end of the reporting period/project



The **Technical Report (Part B) Template**  
for **MSCA-PF** sent to you  
is used for GF & EF reports

**Make sure you use this template** as it  
has specific annotations you must follow



# What to Report: Technical Report – Part B



## What was done

- ✓ Objectives achieved?
- ✓ Scientific Work Packages completed?
- ✓ How was the Project managed?
- ✓ Training and Transfer of knowledge activities completed?
- ✓ Communication, Dissemination and Exploitation of project results as planned?
- ✓ What was the impact? (scientific and on the fellow's career)

VS

## What was planned (Grant Agreement, Annex 1)

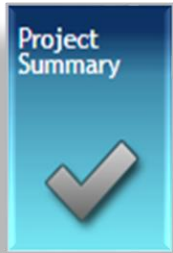
- ✓ Objectives
- ✓ Scientific Work Packages
- ✓ Training and Transfer of knowledge
- ✓ Communication, Dissemination and Exploitation of project results
- ✓ Impact

## Deviations

- ✓ Reasons
- ✓ Consequences on original plan
- ✓ Proposed corrective actions



# What to Report: The Summary for Publication



The **Summary for Publication** – in the **Project Summary** tab covers the entire duration of the project

## Content:

- ✓ Context and overall objectives
- ✓ Work performed and main achievements
- ✓ Results beyond the state of the art
- ✓ Policy relevant evidence/outcomes of your project
- ✓ Image(s) illustrating the project and/or its results (GDPR compliant)



The **Project Summary** will be **publicly available** on **CORDIS**

- ✓ Use simple language, understandable by a non-specialist audience
- ✓ **Do not include confidential or IP-sensitive information**



# Frequent Mistakes (to avoid!)



## Technical Report – Part B

- ✗ Cover page with **wrong information** (e.g. **dates**)
- ✗ **Wrong report template** used or provided **template annotations not followed**
- ✗ Not reporting on the **original proposal** (Annex 1 to the Grant Agreement)
- ✗ Lack of clarity on whether the **scientific objectives** have been achieved
- ✗ Missing information on **Non-scientific activities, Secondments** and/or **Non-academic placements**, and **Deviations**

## Continuous Reporting (becomes Technical Report – Part A)

- ✗ **Project Summary** (for publication) is not understandable by a general audience or mentions confidential/protected results
- ✗ Incomplete/missing information on **project publications** (e.g. repository link)




# You have submitted your report... What's next?



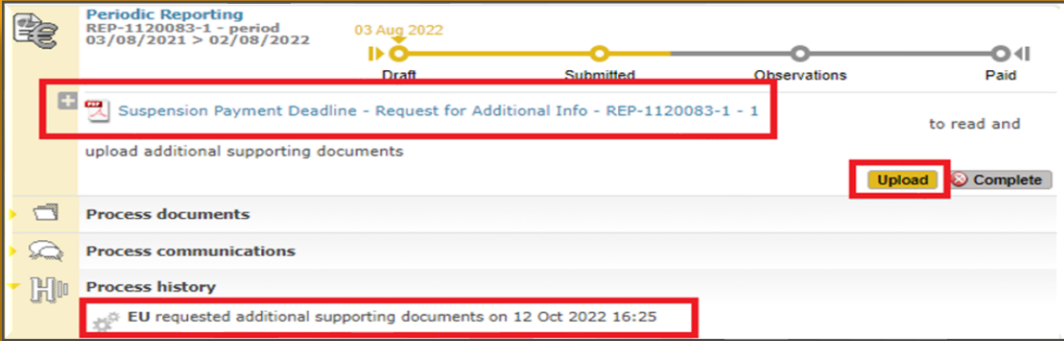
The PO assesses the report  
Three outcomes are possible:

The report is accepted

 REA will pay the remaining funds or recover the amount due within 90 days of submission of the final, accepted version of the report.

Further information is requested

- You will receive a "Suspension of payment deadline letter" with instructions
- Provide requested information or submit the revised report within 15 days via the portal



# After the End of the Project - Your Obligations



## Your obligations include:

- ✓ Communication and dissemination of project results
- ✓ Protection / exploitation of results
- ✓ Visibility of EU funding
- ✓ Submit 2 evaluation questionnaires:
  1. [Evaluation Questionnaire](#) - **immediately after the end** of the project
  2. [Follow-up Questionnaire](#) - **two years after the end** of the project

**Your feedback will help us shape the future  
design of the MSCA-PF programme**



# After the end of the project - good to know



## MSCA Certificate

Available for **Researchers who have completed their MSCA fellowship**. It must be requested by an authorised representative of the beneficiary via an [online form](#)



## Working as an Expert

**Former MSCA Researchers** can register as experts to support the European Commission in the implementation, evaluation and monitoring of its funding programmes. Information and registration on the EU F&T Portal - [Work as an expert](#)



## MSCA Alumni Association (MCAA)

The MCAA brings together **Researchers who benefit or have benefitted from MSCA funding**, in all career stages from all disciplines, encouraging networking and cooperation. Further information in [Marie Curie Alumni Association](#)







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# Communication, Dissemination & Exploitation

*Dimitris KAGANIS*



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# What's the Difference?



## Communication

- ✓ Promote projects, results
- ✓ Newspapers/magazines, digital (YouTube, X, LinkedIn), TV, radio
- ✓ Horizon Results Platform

**Audience:** beyond the project's own community, broader public



## Dissemination

- ✓ Make results public
- ✓ Open Science
- ✓ Horizon Results Platform

**Audience:** users of results (scientific community, patient associations, industrial partners, policy makers)



## Exploitation

- ✓ Make good use of your results
- ✓ Commercial, societal political purpose

**Audience:** partners that make actual use of the results



# Communication



## HOW?

Well-designed strategy

Clear messages

Targeted media channels

## WHEN?

From the start of the project until the end (& beyond...)

## WHY?

Engage with stakeholders

Share best practices

Attract the best experts to your team

Trigger new collaborations and opportunities

Generate market demand

Show the success of European collaboration

Raise awareness of how public money is spent

Legal obligation Article 17 of Horizon Europe



# Free-of-Charge Tools: Communication, Dissemination, Exploitation



Communication



Dissemination



Exploitation



## Research and Innovation success stories

The most recent success stories from EU-funded Research & Innovation



## HORIZON Dashboard

Interactive knowledge platform where you can extract statistics and data on EU Research and Innovation programmes



## CORDIS

Multilingual articles and publications that highlight top research



## HORIZON Magazine

Latest news and features about thought-provoking science and innovative research projects



## HORIZON Results Booster

Apply to benefit from one of these services:

- ✓ Portfolio Dissemination & Exploitation Strategy
- ✓ Business plan development
- ✓ Go-to-Market Support



# Key Points to Remember



## ACKNOWLEDGE EU FUNDING

Article 17.2 of the Horizon Europe grant agreement: **Visibility of European flag & funding statement**



**Funded by  
the European Union**



**Co-funded by  
the European Union**

**Has your project won an important scientific award?**

**Have you made a ground-breaking discovery and/or is featured in the media?**

**Inform your Project Officer & National Contact Point**

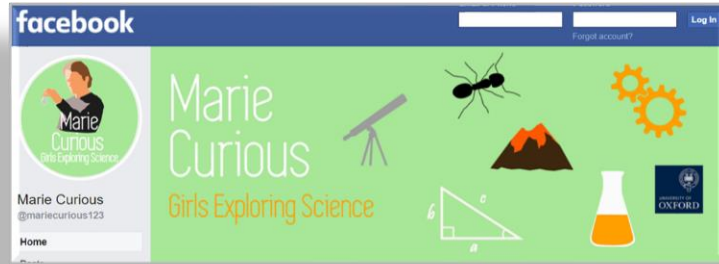
REA's Communication team can help you by:

- ✓ Proposing your project's success story for inclusion in the European Commission's free-of-charge communication channels
- ✓ Highlighting & multiplying your news and results through our own and the Commission's social media channels - **tag us!**



Find guidance and download the EU emblem: <https://europa.eu/!m83Myq>

# Key Points to Remember



- #MSCActions
- #ShapingEuropeTogether
- #MSCANetwork
- #smallbusinesses
- #ResearchImpactEU
- #MSCA
- #ZeroPollution
- #EUfunded
- #NextGenerationEU
- #HorizonEU
- #researchimpact
- #smallbusinesssupport
- #eufunds
- #Science
- #smallbusinessideas
- #MarieCurious
- #partnershipsofthefuture
- #MissionOcean
- #MissionCities



# Key Points to Remember



Follow us and stay up-to-date

Keep in touch & always contact your PO



[@REA\\_research](https://twitter.com/REA_research)



[REA website](#)



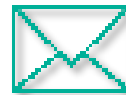
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# Summing Up and Final Q&A

*Christopher Reynolds*



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# Questions & Answers



# Stay in Touch!



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