



# Kick-off Meeting

## MSCA Staff Exchanges

*Project Officer*

More Skłodowska  
Curie Actions

### Overview



Eligibility &  
Record Keeping



Communication,  
Dissemination &  
Exploitation



Reporting



Meetings



Amendments



Payments



Ethics



Key Messages





# Eligibility & Record keeping

## Eligibility of staff members - Institution Link



### Type of contract relationship

- Complies with national laws
- Complies with internal practices
- Control and instructions



### Staff from the sending institution:

- Actively engaged in R&I activities 1 month prior 1st secondment
- Full-time work
- Qualified in R&I activities

## Eligibility of staff members - Type



**Doctoral Candidate**



**Post-doctoral Researcher**



**Administrative, Managerial or Technical staff**

## Record keeping - Responsibility

### **Beneficiary's Responsibility**



- **Beneficiary own staff**



- **Associated Partners staff  
seconded to Beneficiary**

## Record keeping – Staff Eligibility



**Seconded researcher is staff of the entity**



**Seconded staff has the proper R&I expertise**



**Engaged R&I activities 1 month before the first secondment**

## Record Keeping – Secondment eligibility



- **Minimum 1 month & Maximum 12 months**
- **Splitting in several periods is possible (to same or different hosts)**



- **Work performed full time**
- **Activities linked to R&I Work packages**
- **Physical presence**

## Recorded Keeping – Payment



**Category A full amount must be used for the respective staff**



**Category A supports the staff mobility:**



- Travel
- Accommodation
- Subsistence

## Typical Mistakes Found in Audits

**Mistakes that led to rejection of costs:**



- Lack of travel and accommodation supporting documents;
- Lack of evidence of physical presence of the fellow in the premises of the hosting organisation;

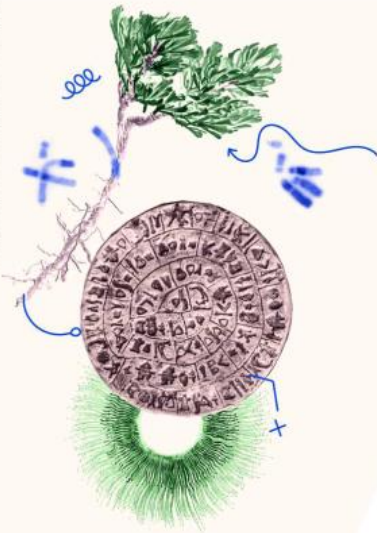


- Lack of evidence concerning the full-time and exclusive dedication of the fellow to the project activities during the secondment;



- Secondments performed remotely (virtual secondments);
- Lack of evidence concerning the existence of a proper link between the fellow and the sending organisation.

image sources: Shutterstock.com / Digiplush



# Communication, Dissemination & Exploitation



## What is what?

### COMMUNICATION



Promoting the Action and its results

### DISSEMINATION



Public Disclosure of Results

### EXPLOITATION



Use of Results



## Acknowledging EU funding (GA Art. 17)



Funded by the  
European Union

**EU Emblem (Flag)**

**Acknowledge EU Funding**



**Disclaimer**



**Graphics Guide**



## Communication Tools

**PROJECT WEBSITE**



**SOCIAL MEDIA**



**OUTREACH**



# Open Access to Scientific Information

Free of Charge & Re-usable for R&I



## 1) Peer-Reviewed Scientific Publications

- NO embargo allowed: deposit immediately in repository
- Journal Checker Tool



## 2) Scientific Research Data



# Open Science Mandatory Practices



## Data Management Plan (DMP)



Research outputs and metadata must be managed in line with "**FAIR**" principles  
Findable Accessible Interoperable Reusable



Ensure the **reproducibility** of research outputs



Deposit data in a **trusted repository** and ensure open access: *as open as possible, as closed as necessary*





# Exploitation

**OWNERSHIP  
TRANSFER**



**EUROPEAN  
IP HELPDESK**



**CONSORTIUM  
AGREEMENT**



# EC Support Services



# The European Green Deal

von der Leyen Commission

## EU Green Priorities



**SUSTAINABLE  
PROJECT MANAGEMENT**



**TRAVELS &  
MEETINGS**



**COMMUNICATION  
& DISSEMINATION**

MSCA Green Charter



## Reporting



# Continuous Reporting



**Deliverables**



**Mobility Declarations**

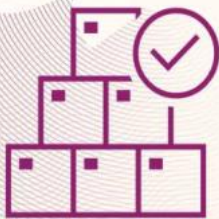


**Progress Report**



**Other Tabs**

# Continuous Reporting - Deliverables



- *Data Management Plan* due **Month 6**
- *Plan for the dissemination and exploitation of results, including communication activities* due **Month 6**
- Progress Report due **Month 13**
- Mid-Term Meeting due **Month 14-18**
- **No Personal data in "Public" deliverables**

# Continuous Reporting - Mobility Declarations



Must be submitted within 20 days from start of secondment



## Exchanges between EU/AC in the same sector ("interdisciplinary")

- Only applicable to your project if validated at GAP
- Maximum eligible: 1/3 of months funded by EU implemented
- If more than 1/3: deduction of costs at the end of the project



# Continuous Reporting - Mobility Declarations

The screenshot displays the 'Add Researcher' pop-up window in the reporting system. The window contains the following elements:

- Header:** 'Add Researcher' with a warning icon and a text box: "When encoding a new Researcher for this project, you're invited to import his basic portal. In order to proceed so, please encode in a first phase only his email address for updates" button at the bottom of this pop-up. In case the Researcher couldn't be his information can be manually encoded and you must ask him to perform his registration Profile."
- Form Fields:** Researcher ID, Title\*, First Name\*, Family Name\*, Gender\*, and Nationality\* (all with dropdown menus). A red arrow labeled '2' points to the Title\* dropdown.
- Buttons:** 'Add Researcher' (highlighted with a red box and labeled '1') and 'Add Researcher Exchange'.
- Background:** The main interface shows a navigation bar with 'Patents (IPR)', 'Communic... Activities', 'Datasets', 'Mobility', and 'Other Results'. The 'Mobility' tab is active. Below the navigation bar, there is a 'Researchers' table with one entry: Researcher ID '2', First Name 'Ano', Family Name 'Ny'. Below that, 'Percentage of Interdisciplinary Exchange: 0' and a 'Mobility Declarations' table with columns: Number, Researcher # ID, First Name, Family Name.



# Continuous Reporting - Mobility Declarations

Call: HORIZON-MSCA-2021-SE-01  
Topic: HORIZON-MSCA-2021-SE-01-01

Patents (IPR) ✓ Communic... Activities ✓ Datasets ✓ Mobility i Other Results ✓

**New Researcher Exchange**

Researcher Information Exchange Information Exchange Period

Researchers

Please choose a researcher that was previously saved for this project

Researcher ID	First Name	Family Name	Gender	Birthdate	Nationality
2	Ano	Nymous	X	16/11/2022	CP

2

Percentage of Interdisciplinary Exchange: 33.3333333%

Mobility Declarations

Number	Researcher ID	First Name	Family Name	Send Organisation
1	1	Ano	Nymous	EPEM
2	1	Ano	Nymous	EPEM

**New Researcher Exchange**

Researcher Information Exchange Information Exchange Period

Destination Organisation

Legal Name\*

PIC

Country\*

Sending Sector\*  Academic  Non-Academic

1

2

3

4

5

6

7

8

9

0 out of 1

European Commission

# Continuous Reporting - Mobility Declarations

Call: HORIZON-MSCA-2021-SE-01  
Topic: HORIZON-MSCA-2021-SE-01-01

Patents (IPR) ✓ Communic... Activities ✓ Datasets ✓ Mobility i Other Results ✓

**New Researcher Exchange**

Researcher Information Exchange Information Exchange Period

Researchers

Researcher ID	First Name	Family Name
2	Ano	Nymous

Percentage of Interdisciplinary Exchange: 33.3333333%

Mobility Declarations

Number	Researcher ID	First Name	Family Name	Sending Organisation	Destination Organisation	Start date	End date	Working Time Commitment	Duration	Interdisciplinary Exchange	Status	Actions
1	1	Ano	Nymous	EPEM	AST	01/10/2022	31/10/2022	Full-Time	1	-	SUBMITTED	+
2	1	Ano	Nymous	EPEM	CENTRE	01/11/2022	30/11/2022	Full-Time	1.00	-	DRAFT	+

**New Researcher Exchange**

Researcher Information Exchange Information Exchange Period

Exchange Period 1

Start date\*

End date\*

Working Time Commitment\* Full Time

Delete Period

1

2

3

4

5

6

7

8

9

0 out of 1

European Commission

**Same Staff = Same "Researcher ID" number**

# Continuous Reporting - Progress Report



Template accessible via Continuous Reporting:



Activities performed during 1<sup>st</sup> year (M1-12)



Deliverable at M13

Horizon MSCA portal navigation: Secondary for publication, Deliverables, Milestones, Critical Risks, Publications, Results, Dissemint... activities, Communic... activities, Standards, Intellectual property (IP)

Deliverables and Other Reports

4 Guidance

5 Templates & forms

6 Progress report (HE MSCA)

7 EN



# Continuous Reporting – Others



Publications

➤ OpenAIRE



Patents

Seconded questionnaires

➤ at end of secondment

➤ 2 years after end of secondment



Mandatory to provide the seconded staff the SE Information Package



all tabs must be completed by the end of period!!



# Periodic Reporting



Periodic Reporting module opens at end of period (M24 & M48)



Information in Continuous Reporting automatically transferred



Beneficiaries submit Financial Statements to Coordinator



Coordinator submits full Periodic Report to REA



# Periodic Reporting - Sections



## 1 Technical Report:

- Part A: completed in the portal
- Part B: uploaded word document



## 1 Financial Statement from each Beneficiary

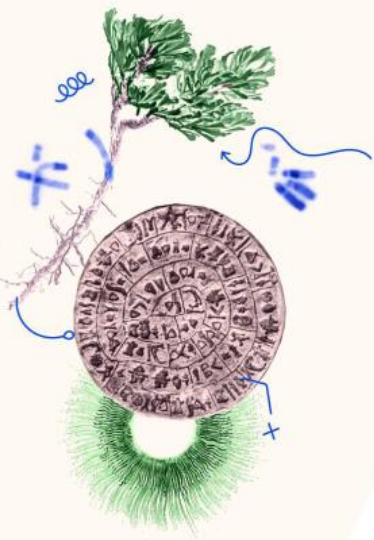


## Mobility Declarations:

- Must be encoded before submission of Financial Statement
- Can't be in "Draft" when Periodic Report is submitted



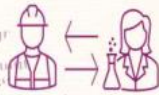
image sources: iStockphoto.com / Lingplian



# Meetings



## Kick-off meeting - Purpose



**What is Staff Exchanges?**



**Discuss project implementation**



**Financial arrangements**



**REA participation**





## Mid-term meeting (Deliverable)

- REA Staff
- (External Experts)

- Beneficiaries
- Associated Partners
- Seconded Staff



In EU/AC

Between month 14-18  
(after project start date)



## Mid-term meeting - Scope



Status of the project



Financial arrangements and mitigating measures



Meet seconded staff



## Mid-term meeting - Coordinator's Role



At least 6 months in advance agree on time and location



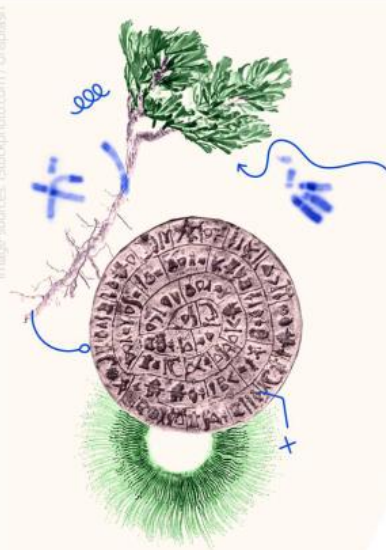
Establish meeting Agenda with PO and inform Consortium



Ensure participation of Seconded Staff



Ensure submission of Mobility Declarations



## Amendments



## Amendment or not ?



Consult your PO to identify the need for AMD

## Introduction to AMENDMENTS (AMD)



AMD is a change to Grant Agreement (GA)



Initiated either by COO or by REA



Mandatory consultation/interaction with PO



Possible over the project life-cycle

## When is an amendment normally **NEEDED**?



**Changes in the Consortium (Beneficiaries or Associated Partners)**



**Changes with Coordinator (e.g. bank account)**



**Changes affecting the project (Annex 1, Annex 2, start date, etc.)**

## When is an amendment **NOT** Needed?



**Change of the name or address of a beneficiary**



**Bank's name or address**



**Change of authorized signatory (PLSIGN / PFSIGN)**



**Change the information directly in the portal**

## Amendment ? (check with PO)



Minor modifications of the Annex 1



For certain budget transfers



Universal takeover (unless Coordinator)

## How do I request/set up an AMD



Always contact the PO before opening an Amendment



If the AMD is needed, launch a new interaction with EU in the portal



Fill the info in relevant tabs and upload all necessary documents

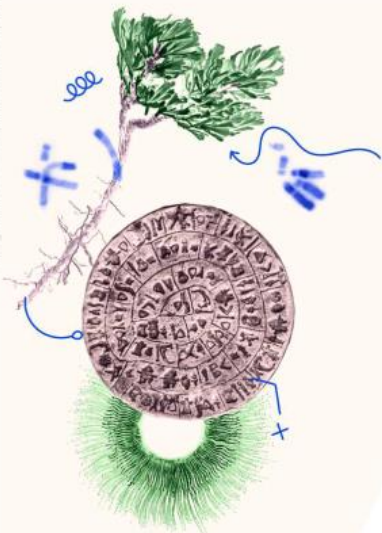


Check that validations are completed



Submit for “EU review” for validation by PO before signature

Image sources: Shutterstock.com / Unsplash



# Payments



## Unit costs



**Not real costs**  
**Unit cost per month of secondment**

**Category A for staff**  
**Category B for institution**



**4600€ x (full) month**

**Incomplete month / split stays**  
**➤ 30 days basis**



## Unit costs



from 1 May until 31 May = 1 Month  
from 1 May until 30 June = 2 Months



from 10 May until 9 June = 1 Month  
from 10 May until 9 July = 2 Months



from 12 March until 25 August = 5,47 Months  
5 months (from 12 March to 11 August)  
Plus 14/30 (for the 14 days from 12 to 25 August)

## Cost categories



# Cost categories

## Category A



- Mobility allowance
- Full amount payment
- Keep supporting documents
- Staff retains rights

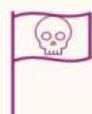
## Category B



- R&I activities, training
- Other indirect costs
- No supporting documents needed
- Can complement Category A



# Project Payments



Be aware of phishing scams

## Prefinancing



- 65% of maximum grant amount
- 5% retained MIM

Within  
30 days

## Interim payment



- Upon approval of periodic report
- Cost claim, up to 90% of maximum

Within  
90 days

## Final payment



- Upon approval of last periodic report
- Cost claim (balance)
- Restitution 5% MIM

Within  
90 days





## Project Payments – Associated Partners



**Beneficiaries may transfer funds to Associated Partners**



**Beneficiaries are accountable**



**Distribution of funds towards AP agreed in Partnership Agreement**

## Special needs allowance



**Budget for items and services for staff members with long-term impairment disabilities**



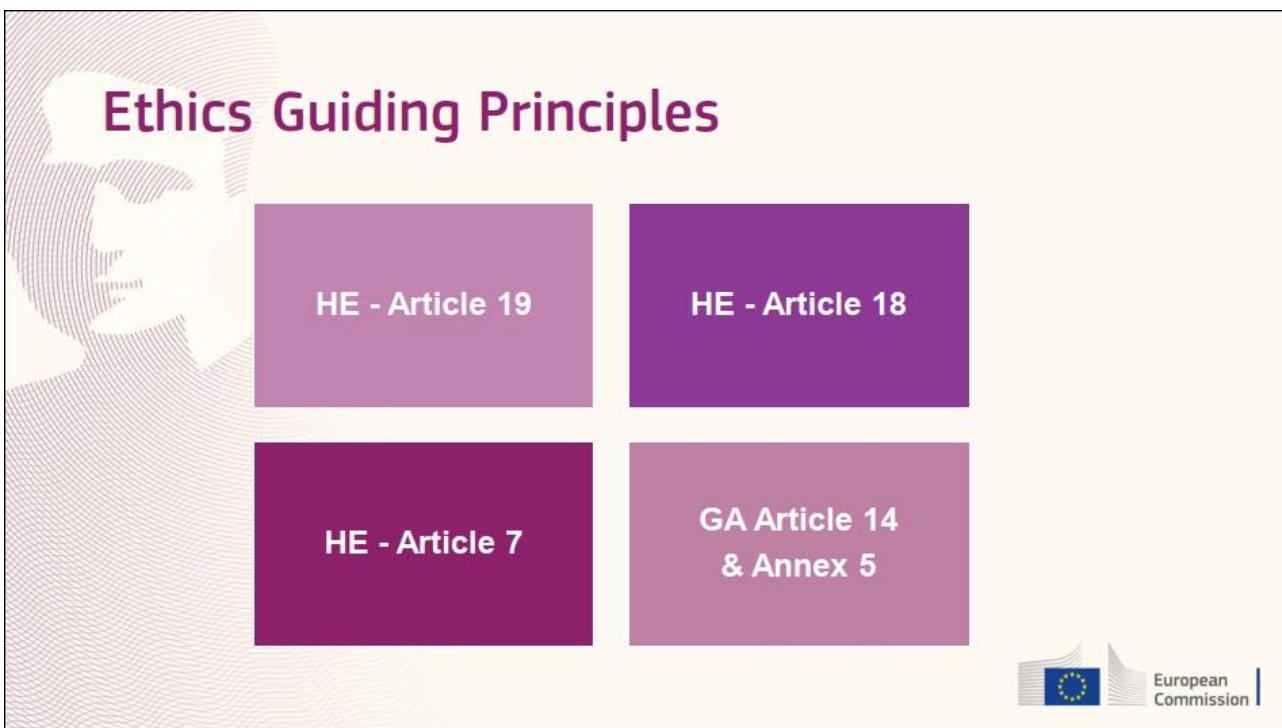
**Certified by a competent national authority**



**Not funded from another source**



**Pre-defined budget categories**



## Cleared Proposal



- No serious/complex ethics issues
- No ethics requirements

Keep all the ethics documents on file

## Conditionally cleared



At least 1 ethic requirement



Independent Ethics Advisor / Ethics Advisory Board

- Must be appointed from beginning of project
- Must submit EAEAB report with each Periodic Report (1&2)



Possible Ethics Check / Review

## Ethics Advisor / Ethics Advisory Board



**Independent**



**Expertise**



**Oversee / Advise**



### Deliverables

- Appointment of EA/EAB
- EA/EAB report for Period 1
- EA/EAB report for Period 2

## Ethics Check / Review



**Keep the documents on file  
Send to REA when required**



**Ethics experts will check  
the compliance**

## Serious or Complex Proposals



**Clarifications  
Deliverables**

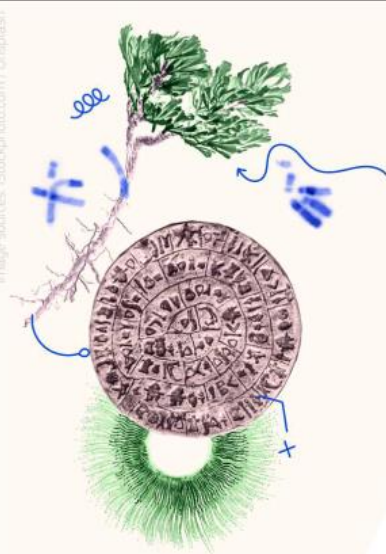


**Independent  
EA/EAB**



**Ethics Check  
Review**

**Additional Requirements**



## Key Messages

# Eligibility and Record Keeping



**Adequate supporting documents to show the duration of the secondments**



**Must demonstrate that**

- **secondment happened as declared**
- **secondee complied with the eligibility conditions**



# Communication, Dissemination & Exploitation



**EU funding Acknowledgement & EU Emblem**



**Open Access Mandatory**

- **Peer-reviewed scientific publications (immediate)**
- **Scientific research data**



**Data Management Plan (Month 6)**



**Notify the REA prior to ownership transfer or exclusive licensing**



## Reporting



**Update Continuous Reporting regularly**



**Mobility Declarations (20 days from start of secondment)**



**Periodic Reports (60 days from end of period)**



**No Personal Data in "Public" Deliverables**



## Kick-off Meeting



**Select staff for secondments well in advance**



**Identify project risks**



**Agree on financial arrangements**



**Finalise Consortium/Partnership Agreement**



## Mid-Term Meeting



Contact the PO at least 6 month in advance



Complete Mobility Declarations & Deliverables



Ensure participation of secondees



Present project results and exchanges

## Amendments



Agree with your PO on the need for an AMD (only if needed)



Structure carefully your AMD in line with the guidelines



## Payments



Reimbursements based on unit costs (months of secondment)



Category A fully used for the benefit of seconded staff



Category B used in accordance with the Consortium Agreement



Distribution of Pre-financing when Beneficiary accedes the GA



Be aware of phishing scams



## Ethics



Ethics compliance is mandatory

Keep the ethics documents on file, they can be requested



*If conditional clearance:*

Mandatory reports from Ethics Adviser / Advisory Board (M24 & M48)



*If ethics check / review:*

PO will request the ethics documents and information



*If serious or complex ethics issues:*

Upload Ethics deliverables in due time



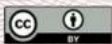


Thank you!



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

[https://rea.ec.europa.eu/funding-and-grants/horizon-europe-marie-sklodowska-curie-actions\\_en](https://rea.ec.europa.eu/funding-and-grants/horizon-europe-marie-sklodowska-curie-actions_en)



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