Aspectos presupuestarios de las Acciones MSCA PF 2022

Sesión informativa nacional, 6 de junio 2022

Cristina Gómez, Representante y Punto Nacional de Contacto MSCA
Contenido

• Modalidades de participación
• Costes unitarios y partidas presupuestarias
• Aspectos a tener en cuenta
• Enlaces relevantes
MSCA PF 2023: two options, 260,47 M€

**European Postdoctoral Fellowships**
12 – 24 months

**Global Postdoctoral Fellowships**
12-24 months outgoing phase + 12 months return phase

**Timeline**
- **Publication**: May 2023
- **Closing**: Sept 2023
- **Evaluation**: 10-12/23
- **Results**: Feb 2024
- **GA**: 02-05/24
MSCA PF 2023: European Fellowships

- Open to all nationalities
- Mobility rule applies: no more than 12/36 months in the host country prior to 13/09/2023
- Researchers with PhD and not more than 8 years of research experience (13/09/2023) can apply
- Exceptions apply (maternity leave, career breaks, time outside of EU ...)
- Project carried out at a European Beneficiary/Host Institution (based in a Member State or Associated Country to Horizon Europe)
- Possibility to carry out secondments worldwide
- 12-24 months duration
- Possibility to have a placement at the end of the fellowship in Europe (+ 6 months)
MSCA PF 2023: Global Fellowships

- Consists of an **outgoing phase outside of Europe** (Third Country, 12-24 months – Associated Partner) and a **final incoming phase in Europe**, at the host institution (Beneficiary, 12 months)
- Open to EU/AC nationals or long-term residents in Europe
- **Researchers with PhD and not more than 8 years** of research experience (13/09/2023) can apply
- Exceptions apply (maternity leave, career breaks, time outside of EU ...)
- Mobility rule applies in **Third Country** (not more than 12/36 months prior to 13/09/2023)
- 24-36 months duration
- Possibility to carry out **secondments** in the **outgoing phase**
- Possibility to have a **placement** at the **end of the fellowship in Europe** (+ 6 months)
ERA Fellowships 2023

The ERA Fellowships are open for applicants of any nationality with a beneficiary from a Widening Country. Budget: €8M

**How does it work?**

- Global Fellowships are **not eligible**
- Applicants need to **opt in at application stage** (there will be no other opportunity later on)
- A number of excellent applications (i.e. on the reserve list) that cannot be funded by MSCA due to budget constraints will be offered an ERA Fellowship
## Contributions for recruited researchers

### Per person-month

<table>
<thead>
<tr>
<th>Allowance</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living allowance</td>
<td>EUR 5,080</td>
</tr>
<tr>
<td>Mobility allowance</td>
<td>EUR 600</td>
</tr>
<tr>
<td>Family allowance (if applicable)</td>
<td>EUR 660</td>
</tr>
<tr>
<td>Long-term leave allowance (if applicable)</td>
<td>EUR 5,680 x ( \frac{%}{1/\text{number of months}} )</td>
</tr>
<tr>
<td>Special needs allowance (if applicable)</td>
<td>Requested unit ( \times )</td>
</tr>
</tbody>
</table>

### Institutional unit contributions

### Per person-month

<table>
<thead>
<tr>
<th>Contribution</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research, training and networking contribution</td>
<td>EUR 1,000</td>
</tr>
<tr>
<td>Management and indirect contribution</td>
<td>EUR 650</td>
</tr>
</tbody>
</table>

- **Budget pre-calculated by EC, based on unit costs**
- **100% financing**
MSCA HEU: Allowances novelties in HE

A living allowance to cover personnel costs for the employment of researchers with full social security coverage.

A mobility allowance to cover additional, private mobility-related costs, e.g. travel and accommodation costs.

A family allowance to contribute to mobility-related costs of researchers with family obligations which can be granted during the project (increased from 500 to 660€).

A long-term leave allowance to cover personnel costs incurred by the beneficiaries in case of the researchers’ leave, including maternity, paternity, parental, sick or special leave, during the project lifetime.

A special needs allowance to contribute to the additional costs for the acquisition of special needs items and services for researchers with disabilities, e.g. assistance by third persons, adaptation of work environment, additional travel/transportation costs, up to 60,000€/researcher during the project life-time.
## MSCA PF 2023: EF Example

<table>
<thead>
<tr>
<th>MSCA</th>
<th>Researcher Unit Cost (person/month)</th>
<th>Institutional Unit Cost (P/M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Living Allowance*</td>
<td>Mobility Allowance</td>
</tr>
<tr>
<td>IF</td>
<td>5.080</td>
<td>600</td>
</tr>
<tr>
<td>IF ES</td>
<td>4.638,04</td>
<td>600</td>
</tr>
<tr>
<td>IF 24 months ES</td>
<td>111.312,96</td>
<td>14.400</td>
</tr>
<tr>
<td>TOTAL IF 2 years</td>
<td>181.152,96€</td>
<td></td>
</tr>
</tbody>
</table>

### RESEARCHER UNIT COST

- **Living Allowance:**
  - CCC: country correction factor applies (host country) **91,3**
  - Gross EU contribution living allowance (- cuota patronal, - taxes, - S.S...) before taxes!

### INSTITUCIONAL UNIT COST

- **Research, training and networking costs:**
  - Purchase of material, organisation and travel to events, payment of conferences fees, etc.

- **Management and overheads:**
  - Indirect costs for institutions
### 3 - Budget

Is the Researcher eligible for family allowance?*  
☑ Yes  ○ No

<table>
<thead>
<tr>
<th>Duration of outgoing phase (12 to 24 months)*</th>
<th>Country in which outgoing phase will take place*</th>
<th>Associated Partner for the Compulsory Outgoing Phase*</th>
</tr>
</thead>
<tbody>
<tr>
<td>24</td>
<td>United States</td>
<td>AMNH</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Country in which return phase will take place</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Non-academic placement duration (1 to 6 months)*</th>
<th>Country in which non-academic placement will take place*</th>
<th>Associated Partner for Optional non-academic placement*</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Spain</td>
<td>EFFECTIA INNOVATION SOLUTIONS SL</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Country Coefficient</th>
<th>Number of Months</th>
<th>Contributions for recruited researchers</th>
<th>Institutional contributions</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td>Living Allowance</td>
<td>Mobility Allowance</td>
<td>Family Allowance</td>
</tr>
<tr>
<td>Outgoing phase</td>
<td>1.023</td>
<td>24</td>
<td>124724.15</td>
<td>14400.00</td>
<td>15340.00</td>
</tr>
<tr>
<td>Return phase</td>
<td>0.913</td>
<td>12</td>
<td>55656.48</td>
<td>7200.00</td>
<td>7920.00</td>
</tr>
<tr>
<td>Placement in non-academic sector</td>
<td>0.913</td>
<td>3</td>
<td>13914.12</td>
<td>1800.00</td>
<td>1980.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td></td>
<td>194294.75</td>
<td>23400.00</td>
<td>25740.00</td>
</tr>
</tbody>
</table>
Relevant aspects

At proposal stage:

• **Deductions apply** to amounts indicated in MSCA Work Programme as well as **Country Coefficient Factors** to adapt the project to the host country.

• These are **not irrelevant** aspects, please be in touch with your institution PRIOR to submitting the proposal.

• You **don´t need to explain** how the budget will be distributed for RTN, unless something really specific
Relevant aspects

At implementation stage:

• Institutions **follow national and institutional rules**, always talk to the Human Resources + European Office staff

• **Taxation varies** throughout Europe

• RTN budget must be made available for the use of the project and for the benefit of the researcher

• A good **Career Development Plan** will include details on how the budget will be used

• In case of secondment/placement, a **Partnership Agreement** will be signed between institutions to establish the specific activities, IPR aspects, management of funds
Portal Funding and Tender Opportunities (FTOP)

• Portal where all EU calls are published
• Official documentation for MSCA Call

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home
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Portal Funding and Tender Opportunities (FTOP)

Under Marie Skłodowska-Curie Postdoctoral Fellowships (MSCA-PF), does the researcher have to justify his/her family status?

If the proposal is successful, it is a contractual obligation for the beneficiary (the entity signing the grant agreement) to ensure that all the necessary documentation demonstrating the researcher’s family status is correct and is kept on file in case of audit.

Under Marie Skłodowska-Curie Postdoctoral Fellowships (MSCA-PF), can EU funds be transferred to a third country, including the funding intended to cover indirect costs?

The EU contribution must be directly managed by the beneficiary established in an EU Member State or Associated Country. According to Article 9 of the MSCA-PF Grant Agreement, the beneficiary may call upon associated partners to implement part of the action (e.g. hosting and training the researcher during a secondment or the outgoing phase of a Global Fellowship). Associated partners participate in the action but do not sign the grant agreement and do not have the right to charge costs or claim contributions. Only the beneficiary can claim contributions. The beneficiary retains sole responsibility for implementing the action and complying with the grant agreement, including an obligation to ensure that certain contractual obligations also apply to associated partners. It is highly encouraged to define these obligations as well as financial arrangements between the beneficiary and associated partners, according to the needs of the project, in a partnership agreement. For a definition of “associated partner”, please see 2.3.1 Annex 2 of the Horizon Europe Work Programme.

During an MSCA Postdoctoral Fellowship (MSCA-PF), the researcher requires additional funding for personnel and lab equipment that is not covered by the MSCA grant. Is it possible to apply for another grant in that respect?

The Marie Skłodowska-Curie actions (MSCA) scheme does not prevent the host institution from receiving additional funding as long as the same costs are not reimbursed by both grants, and the researcher does not receive (for activities carried out in the frame of the action) other incomes than those received from the beneficiary.
While implementing an MSCA-PF, the researcher has been awarded a permanent academic position within an organisation that is not the host institution. Can he/she nevertheless participate in the Marie Skłodowska-Curie Postdoctoral Fellowship?

No, he/she cannot. According to Article 18 of the Model Grant Agreement for Unit Grants, the researcher must work exclusively on the action, unless part-time for professional reasons is allowed and has been approved; additionally, the researcher cannot receive incomes other than those received from the beneficiary for the activities carried out in the frame of the MSCA.

Under Marie Skłodowska-Curie Postdoctoral Fellowships (MSCA-PF), is it possible to work part-time?

As a rule, in MSCA-PF the researcher must be employed full-time. Part-time employment can however be accepted on personal or family grounds, after the start of the action. Part-time for professional reasons in order to pursue supplementary activities can also be requested provided that it is agreed beforehand together with the supervisor and beneficiary and has received the prior approval of the European Research Executive Agency (REA). However, the researcher cannot be involved in two MSCA grants at the same time. In case of part-time work for professional reasons, the researcher must dedicate at least 50% of their working time to the MSCA-PF action.

For Global Fellowships, part-time work due to engaging in supplementary activities cannot take place during the outgoing phase. Supplementary activities include, for example, creating a company, pursuing another research project, enrolling in advanced studies not related to the MSCA grant.
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What happens next

Research Executive Agency (REA)
Sesiones informativas y documentación de apoyo
Convocatoria Proyectos Posdoctorales MSCA 2022 | Horizonte Europa

@horizonteeuropa
Nothing in life is to be feared, it is only to be understood. Now is the time to understand more, so that we may fear less.

¡Muchas gracias!

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