Your MSCA Individual Fellowship:
A Guide to Implementation

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Table of Contents

The purpose of this short guide is to provide some information and anticipate some questions relating to the <u>implementation</u> of your Marie Skłodowska-Curie Individual Fellowship (MSCA-IF).

Your project will be managed by the Research Executive Agency (REA), an agency established by the European Commission to manage EU research grants. Although your supervisor and/or the people at your host institution responsible for administering your project should be your first points of contact should you experience any difficulties or require any assistance, your main contact at the REA will be your designated Project Officer (PO). Contact with your PO should take place exclusively through the Communication Centre interface in the [Funding & Tenders Portal](#) (under "Manage Project"), unless you would like to discuss sensitive or private issues. You can find the contact details of your PO in the Evaluation Result Letter.
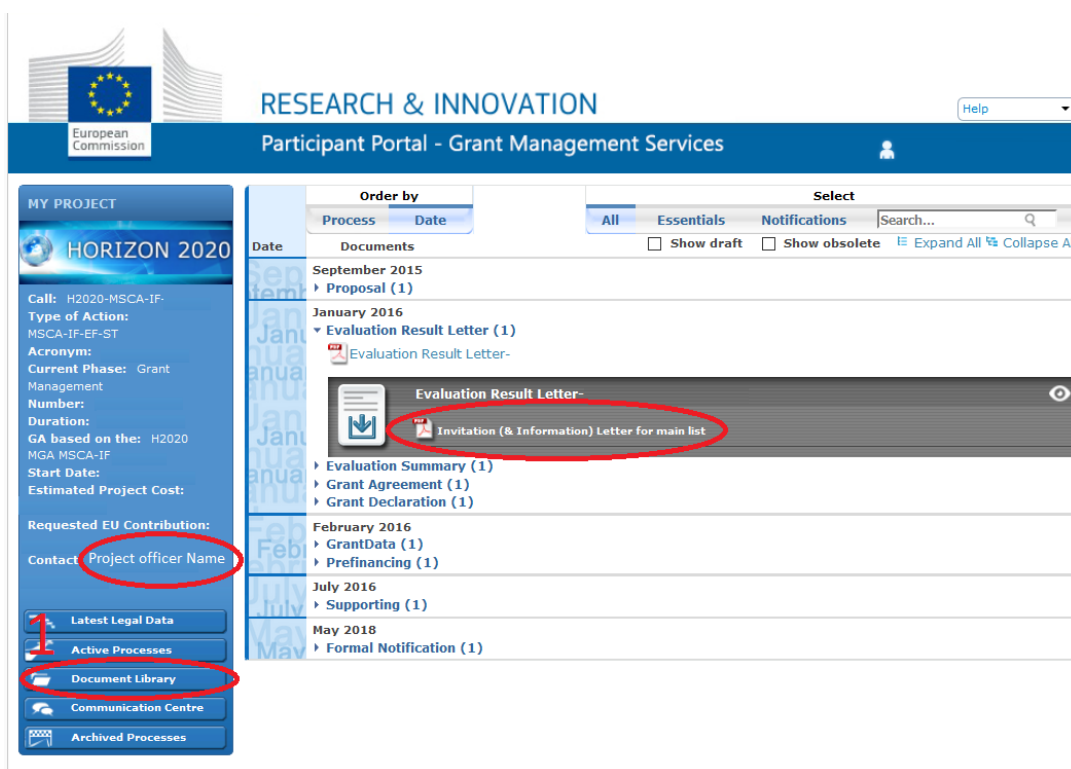

Figure 1: How to find the Evaluation Result Letter and the Grant Agreement

We strongly encourage you to read carefully the grant agreement and its annexes. These are the principal legal texts that will govern the implementation of your fellowship. You can find them under "Document Library" (see figure 1 above).

1. Project Implementation[1]

1.1 Project Start Dates

The grant agreement has now been signed by the REA. During the Grant Agreement Preparation (GAP) for your Fellowship, your host institution selected one of the three start date options below:

1. Fixed start date

2. First day of the month after entry into force of the grant agreement

In both of the above cases there is nothing that you need to do. Your project will start automatically on the date indicated in the Funding & Tenders Portal. However, should you anticipate any problem with starting the project on this date, please notify your PO <u>as soon as possible</u>. Note that normally it is not possible to change this date retroactively.

3. Effective start date to be notified by the beneficiary

Under this option, you and/or your host institution are committed to informing the REA – via the Funding & Tenders Portal – of the start date you have chosen for your Fellowship. The start date must be <u>within 12 months of the date that the grant agreement was signed</u> by the REA.

? | ***How do I notify a start date?***
Notification should be done through the Funding & Tenders Portal under the "proposal management" section, and the link "Notify the project start date".

Please note that the notification of a start date is the formal responsibility of your host institution. Although it is possible for you, the researcher, to notify a start date in the Funding & Tenders Portal, we strongly advise you to liaise carefully with your supervisor and host institution before doing so.
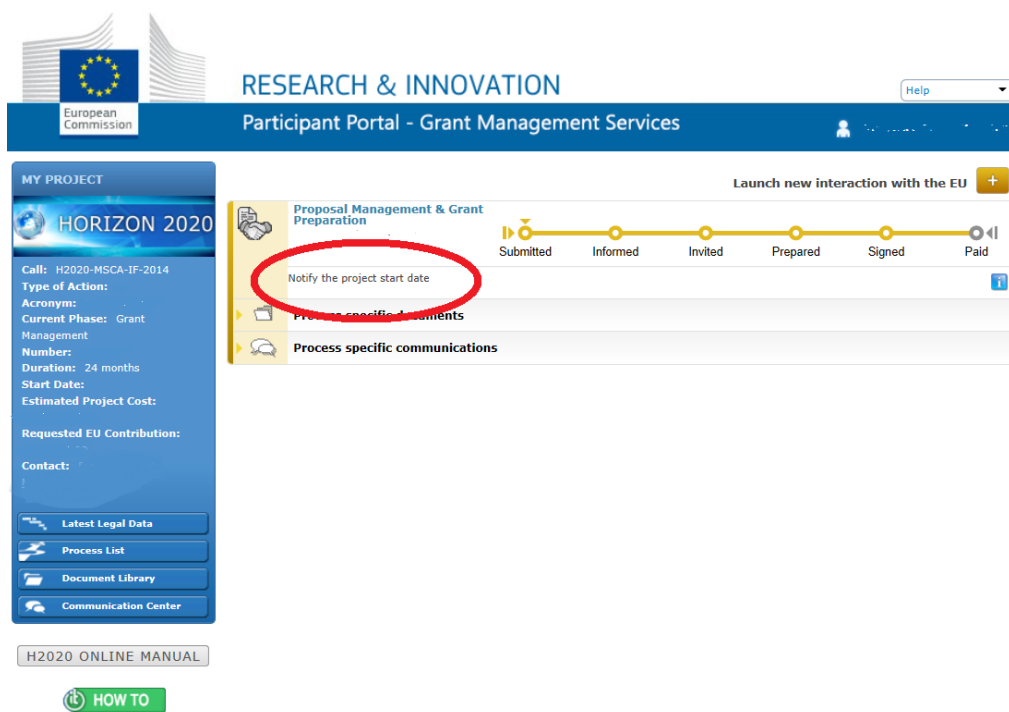

Figure 2: How to notify the project start date

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[1] For the purposes of Horizon 2020, each specific grant receiving funding is referred to as an "action". To avoid confusion with the Marie Sklodowska-Curie *actions*, the present document instead refers to "projects".

1.2 Inform Your Host Institution

You should inform your host institution as soon as possible of any events or circumstances which are likely to affect your employment and/or the implementation of your project (Art.32.1(f)(v)). These could include, for example, encountering difficulties with your research or seeking changes in your training plan, or on a personal level serious illness or pregnancy which may require the amendment or suspension of the agreement (see next point). In turn (Art.17), your host institution has the obligation to inform the REA about any events or circumstances likely to affect significantly or delay the implementation of the project.

1.3 Amendments and Formal Notifications

The grant agreement is a binding, legal contract. Its provisions are therefore legally binding and must be respected. Any substantive changes to either the proposed work or the way that the project is implemented must therefore be agreed and accepted by the REA through an amendment or formal notification procedure.

Amendments

Events triggering an amendment to the grant agreement include changes to:

- project start date
- project duration
- the fundamental scientific direction of the project
- time dedicated to the project (e.g. project suspension, due to maternity or serious illness)

Note that amendments should be discussed beforehand with your host institution and should always be requested *before* the actual change in question occurs, since amendments are not a mere formality and there is no guarantee that they will be accepted *ex post*. Moreover, amendments cannot be submitted in the IT system – and therefore cannot be accepted – after the end date of the project.

Formal Notifications

Certain changes require a "formal notification" to the REA (via the formal notification option in the Funding & Tenders Portal) rather than an amendment. These include:

- Changes to the secondment duration and/or location
- Changes to the scientific supervisor

Again, in such cases please consult your Project Officer beforehand and ensure that the formal notification is submitted well before the change in question is scheduled to occur.

> **?**
>
> ### How do I request an amendment or make a formal notification?
>
> Amendments and formal notifications should be done through the Funding & Tenders Portal under the "Manage Project" section, and the link "Launch a new interaction with the EU". From there, you can launch an Amendment request or a Formal Notification. In the amendment information tab, please complete the "AMD Justification" box providing a description of your request (including dates, reason, and other relevant information). Please always select "Consult Officer" before submitting an amendment request. Our amendment team will then help to guide you through the process.
>
> Please note that requesting an amendment is the formal responsibility of your host institution. Although it is possible for you, the researcher, to do so in the Funding & Tenders Portal, we strongly suggest that the host institution performs this request.

Figure 3: How to request an amendment or send a formal notification

1.4 Secondments

Although an important part of many IF projects, secondments can only take place to institutions located in countries which are either <u>EU member states</u> or which are <u>associated to Horizon 2020</u> (Art. 8.1). No exceptions to this rule are possible.

Note that if a secondment period is indicated in the Annex 1 of the grant agreement, this is considered a contractual obligation and any change – particularly in the institution hosting your secondment – must be agreed beforehand by the REA through the formal notification procedure (see above). All such changes must be carefully explained and justified.

Short visits (for example for field work), on the other hand, have a different nature and pursue different objectives. A short visit is not a "secondment", and therefore the country where a short visit takes place can be anywhere in the world. Short visits imply mobility to another location outside the physical premises of your institution. However, the work done is supervised directly by your institution. Short visits can only represent a small part of the project.

1.5 Open Access

Open access to scientific publications

Article 29.2 of the grant agreement requires that all peer-reviewed publications resulting from your project must be made available through open access, either as "gold" access or "green" access. Either option is permissible, although for "green" open access please note that the rule on embargo periods (maximum of 6 months, or 12 months for projects in social sciences and humanities) must be respected. You are therefore advised only to target those peer-reviewed journals which respect these maximum embargo periods.

Whether you choose "gold" or "green" open access, a machine-readable electronic copy of the published version or final peer-reviewed manuscript accepted for publication must be deposited in a repository for scientific publications. For more information, please consult the [guidelines on open access to scientific publications and research data in Horizon 2020](#). Links to the repositories in question must be provided in the Project Continuous Reporting.

Open access to research data
Article 29.3 of the grant agreement requires that participants in the Open Research Data Pilot submit a Data Management Plan within 6 months of the start of the action and the obligation to deposit the research data in a research data repository. For more information, please see Section 2.1 below and refer to the aforementioned Horizon 2020 open access guidelines.

1.6 Acknowledgement of EU Funding

For all communication relating to the project (Art. 38.1.2) and for any dissemination of results, such as through publications, posters, conference papers, etc. (Art. 29.4) you are required to ensure the visibility of the EU emblem, and to acknowledge EU funding by including the following text:

> *"This project has received funding from the European Union's Horizon 2020 research and innovation programme under the Marie Skłodowska-Curie grant agreement No [number]."*

For infrastructure, equipment and major results:

> *"This [infrastructure][equipment][insert type of result] is part of a project that has received funding from the European Union's Horizon 2020 research and innovation programme under the Marie Skłodowska-Curie grant agreement No [number]."*

Please also keep your PO informed in those cases where your communication activities take place in mainstream media (TV, radio, newspapers, etc.) so that the Agency can help ensure maximum coverage.

1.7 Working Full-Time and Exclusively on the Project

The IF grant agreement states that under normal circumstances you must be "*employed full-time*" and work "*exclusively*" on your project during the period of your recruitment (Art.6.2.A(b)(ii) and (iii)). Therefore your host institution cannot require or insist that you work on other projects except the IF project. However, part-time employment can be requested either for personal/ family reasons or for professional reasons (Article 55). All requests for part-time work are subject to the prior approval of the REA and will require a formal amendment to the grant agreement (see above). Care must therefore be taken to ensure that there is no overlap in work or funding between your other research and professional activities and those for which you are receiving MSCA funding. Indeed, if a request for part-time work for professional reasons is accepted, you will be required to keep reliable time records, either on paper or in a computer-based time recording system.

1.8 Income

Not only must you work full-time and exclusively on your project (unless otherwise agreed), but you are also not permitted to receive additional income from any other source for the research you are conducting in the context of your project (unless this is a "top-up" amount paid by your host institution or your partner organisation in the context of a Global Fellowship).

1.9 Career Development Plan

Your host institution is required to ensure that you establish, together with your supervisor, a so-called Career Development Plan (Article 32.1(k)) and that you are supported in ensuring its implementation during the lifetime of your project. The Plan should define your training requirements, taking into account your research objectives and subsequent career goals. No template is provided for this document, although some examples can be found by searching online. Although you are not formally required to submit this document to REA, since it is a contractual requirement, a copy may be requested for monitoring or audit purposes.

2. Project Reporting

2.1 Continuous Reporting

Continuous reporting refers to the submission of documentation and information relating to the project during the course of the project's implementation. The Continuous Reporting module will be activated as soon as your project has started.
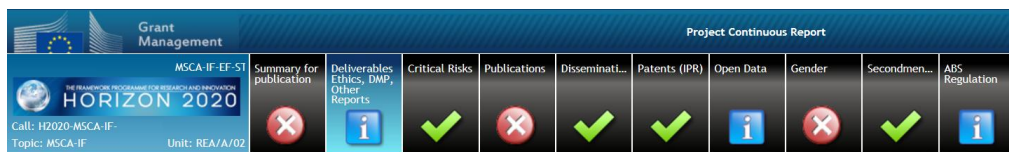

Figure 4: Continuous Reporting toolbar in the Research & Tenders Portal

Deliverables

In Individual Fellowships there are two types of deliverables which may have to be reported:

- Data Management Plan
- Ethics requirements (if there were ethical issues identified in your proposal which were not properly addressed);

All deliverables must be submitted via the Funding & Tenders Portal by selecting the link "Continuous Reporting data" and clicking the "Deliverables" tab. Only one document can be uploaded per deliverable, therefore please merge documents before uploading, where applicable.

a) Data Management Plan

The Data Management Plan (DMP) is a document outlining how the research data will be handled during your project, and after it is completed. It describes what data will be collected / generated; what methodology and standards are used; whether and how this data will be shared and/or made open; and how it will be curated and preserved. The DMP must be submitted within the first 6 months of the project.
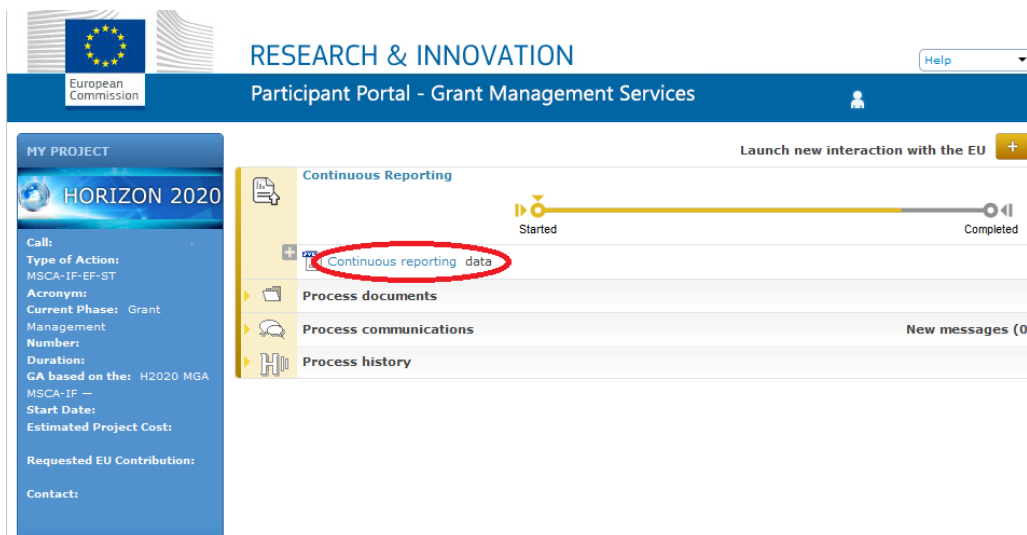
Figure 5: How to access the Continuous Reporting functionality through the Research & Tenders Portal

The Commission provides a DMP template as an annex to the [Guidelines on FAIR Data Management in Horizon 2020](#), the use of which is voluntary but recommended. You will also be required to deposit your research data in a research data repository (such as [Zenodo](#)) and to take measures to enable third parties to access, mine, exploit, reproduce and disseminate (free of charge for any user) this research data.

Please note that you can still **opt out** of the Open Research Data Pilot after signature of the grant agreement, but this requires a formal amendment (see section 1.3) and a reasonable justification.

b) Ethics deliverables

Following the ethics review, the implementation of your project could be subject to the fulfilment of ethics requirements before the beginning of an activity raising an ethical issue. All ethics requirements due once the project has started are automatically included in the grant agreement in the form of deliverables. These deliverables are known as 'ethics deliverables' and, where relevant, will be placed in an automatically generated work package called "ethics requirements".

Figure 6: Ethics deliverables in the Research & Tenders Portal

2.2 Unit Costs

"Unit costs" refers to the fixed amounts that are paid to your host institution for the implementation of your project. These costs are based on units, one unit being one implemented researcher month. The funds provided to your host institution for the purposes of implementing your project are then divided into two sub-categories: those for the benefit of you, the researcher ("researcher unit costs"), and those for the benefit of the host institution ("institutional unit costs").

1. Researcher Unit Costs

These allowances are paid directly to you by your host institution and are to cover your private expenses, not those relating to your project. You should therefore request from your employer a clear overview of how your monthly allowance is calculated (both the gross amount and the amount net of all taxes and deductions). Note that the total amount received may vary from institution to institution, even within the same country. This is because your host institution can deduct employer as well as employee payroll taxes and social security costs from the gross salary.

- ✓ **Living Allowance:** this is the basic, gross amount (i.e. *before* taxation and compulsory deductions) that should be paid to you in monthly instalments. For the IF 2018 Call, this amount is €4880 per month. To ensure equal treatment and purchasing power parity, this amount is then adjusted through the application of a correction coefficient based on the country in which you are hosted. Researchers recruited in higher cost countries therefore receive a higher gross living allowance than those recruited in lower cost countries. The coefficients applied are indicated in the corresponding [MSCA Work Programme](#) and in the grant agreement. Note that each coefficient applies to the whole country in question, even if the cost of living may differ between cities or regions within that country.

- ✓ **Mobility Allowance:** This is a monthly amount of €600 and is intended to cover the costs associated with the fact that you have moved to a different country in order to take up your position. This sum will not be audited and you are therefore free to decide how to use it.

- ✓ **Family Allowance:** Should you have a family at the time of the respective MSCA-IF call deadline, you are entitled to an additional "family allowance" of €500 per month. For the purposes of the MSCA, family is defined as "*persons linked to the researcher by marriage (or a relationship with equivalent status to a marriage recognised by the legislation of the country or region where this relationship was formalised) or dependent children who are actually being maintained by the researcher*." Note that your family status is determined at the time of the Call deadline and remains fixed during the lifetime of the project.

- ✓ **Non-Eurozone Members:** The project budget is calculated and paid in euro; your host institution must also report their costs in euro. Where your allowances are *not* paid in euro (i.e. because your host institution is not located within the Eurozone), the allowances you receive may consequently fluctuate due to exchange rate changes. Your host is normally required to report the costs on the basis of an average of the daily exchange rates over the reporting period. It is permissible for your host institution to underpay you on a monthly basis in order to hedge against this fluctuation, as long as you receive the correct amount by – at the latest – the end of your fellowship.

2. Institutional Unit Costs

These allowances are directly managed by your host institution to cover your professional costs and are divided into two categories: *Research, Training and Network Costs*, and *Management and Indirect Costs*.

- ✓ **Research, Training and Network Costs:** This is a fixed amount of €800 per month for each month a researcher is recruited in the project. Although administered by your host institution, this amount is intended to cover the costs associated with your project as outlined in Annex 1 of your grant agreement, for example attending training courses, conferences, or when going on secondment. This amount should also help to cover the cost

of your research (e.g. consumables), as appropriate, and can also be used to cover other related costs, such as visas. Note, however, that this amount is normally administered by the host institution, not by researchers themselves.

✓ **Management and Indirect Costs:** This is a fixed monthly amount of €650 per researcher month which is for the direct benefit of the host institution in order to cover the costs of their involvement in the project.

2.3 Submission of Reports

The standard duration of IF projects is between 12 and 24 months, with the exception of Global Fellowships and Career Restart Fellowships which can last up to 36 months. Due to professional or personal reasons, however, projects sometimes have to finish sooner (so-called "grant agreement termination") or indeed later than planned (e.g. due to suspension or part-time implementation). Whatever the final length of your project, together with your host institution you will be required to submit a Final Report once your project has ended. Further reporting guidelines will be sent to you at the end of your project.

In your report, you will be required to report on the scientific progress of your project, as well as your training and transfer of knowledge activities, secondments (if any), career development, the scientific management of the project, dissemination and communication activities, and on the project's overall impact.

Your report must be submitted **within 60 days** following the end date of the project. Submission of this report is a precondition for payment of the remaining amounts.
NB: For all Global Fellowship projects, an additional Periodic Report must also be submitted within 60 days following the end of the first reporting period (i.e. at the end of the outgoing phase).

? ┃ ***How do I submit my Final Report?***
┃ Through the Funding & Tenders Portal. Submission is the formal responsibility of your institution. Although it is possible for you, as the researcher, to submit the report we strongly suggest that you liase carefully with your supervisor and host institution before doing so. A separate financial report must be submitted by a legal representative of your institution.

2.4 Submission of Questionnaires

Based on Article 32.1(e) of the grant agreement, funded researchers are requested to submit two questionnaires about their experience: one immediately following the completion of the project ("Evaluation Questionnaire") and one two years later ("Follow-up Questionnaire"). We strongly value the opinions of all researchers funded through the programme and your responses to these questionnaires will help us shape the future design of the MSCA.

? ┃ ***How do I submit a Questionnaire?***
┃ The Evaluation Questionnaire can be accessed [here](). You will need to enter – at a minimum – your project number and acronym. The Follow-up Questionnaire will be operational soon.

3. In Case of Problems

Most projects are invariably implemented without any major difficulties, while those problems that do occur tend to be easily resolved together with your host institution. Indeed, your supervisor and/or those people at your host institution responsible for administering your project should be your first points of call should you experience any difficulties or require any assistance.

Additional help is also provided by the network of National Contact Points (NCPs), individuals within each EU member state and Horizon 2020 Associated Country who are able to provide expertise and support in your host country and/or own language. The names and contact details of the NCP(s) in each country are available here. An EU-funded network coordinating the work of several MSCA-NCPs, called Net4Mobilty, also offers information and support to MSCA applicants and funded researchers. Their website can be accessed here.

Should you experience IT problems with the Funding & Tenders Portal, please consult the Funding & Tenders IT Manual (authentication is required):

HOW TO

 and/or contact the IT HELPDESK directly.

Only when these channels breakdown or, for whatever reason, are not available should you contact the PO at the REA. This can be done through the Funding & Tenders Portal, as previously described .

4. What's Next?

The next step, of course, is to get to work! We wish you every success with your research project and very much hope that your experience as an MSCA Individual Fellow proves to be a fruitful and rewarding one, both personally and professionally.

You can follow the MSCA on Facebook and Twitter for the latest developments, including MSCA events, further funding opportunities, competitions, etc.

@Marie.Curie.Actions

@MSCActions

The Marie Curie Alumni Association
As an MSCA researcher, you are also eligible to join the MCA Alumni Association. Established as a not-for-profit organisation in 2014, the Association offers opportunities for networking and peer exchange, an alumni directory, job offers, an events calendar, and other services of potential interest to IF researchers. The MCAA is free to join and is open to all MSCA-supported researchers, past and present.

5. Further Reading and References

- [MSCA IF mono-beneficiary model grant agreement](#)
- [H2020 annotated model grant agreement](#)
- [Horizon 2020 open access guidelines](#)
- [European IPR helpdesk](#)
- [EurAxess](#)
- [National Contact Points](#)
- [Marie Skłodowska-Curie website](#)
- [DG Education and Culture](#)
- [DG EAC Information Note for MSCA Fellows](#)
- [DG EAC Information Note for MSCA-IF Fellows](#)